

BEFORE THE METRO CONTRACT REVIEW BOARD

FOR THE PURPOSE OF APPROVING A WORK)	RESOLUTION NO. 06-3661
PROGRAM FOR THE 2035 REGIONAL)	
TRANSPORTATION PLAN UPDATE AND)	Introduced by Councilor Rex
AUTHORIZING THE CHIEF OPERATING)	Burkholder, Councilor Brian Newman
OFFICER TO AMEND CONTRACT NO. 926975)	and Councilor Rod Park

WHEREAS, Metro initiated an update to the Regional Transportation Plan (RTP) with approval of Resolution 05-3610A for the Purpose of Issuing a Request for Proposals to Develop a Work Scope for an Expanded 2005-08 Regional Transportation Plan Update that Incorporates the “Budgeting for Outcomes” Approach to Establishing Regional Transportation Priorities on September 22, 2005; and

WHEREAS, the RTP is the federally recognized transportation policy for the metropolitan region and threshold for all federal transportation funding in the region that must be updated every four years; and

WHEREAS, the RTP fulfills statewide planning requirements to implement Goal 12 Transportation, as implemented through the Transportation Planning Rule, and must be updated every 5 to 7 years; and

WHEREAS, the RTP is a central tool for implementing the Region 2040 Growth Concept, and constitutes a policy component of the Regional Framework Plan; and

WHEREAS, it is Metro’s intent to integrate this update to the RTP with the New Look regional planning process and consolidate periodic updates to the RTP to meet applicable federal, state and regional planning purposes; and

WHEREAS, Metro was awarded a Transportation & Growth Management Grant for the 2005 – 2007 Biennium to prepare a regional plan for freight and goods movement and recommendations from this planning effort will be forwarded for consideration as part of the RTP update; and

WHEREAS, the most recent update to the RTP was completed in March 2004 and the next federal update must be completed by March 2008 to provide continued compliance with federal planning regulations and ensure continued funding eligibility of projects and programs using federal transportation funds; and

WHEREAS, the federal update requires the development of a “financially constrained” system of improvements that meet regional travel demand, yet are constrained to reasonably anticipated funding levels during the 20-year plan period; and

WHEREAS, the recently adopted RTP contains a large shortfall between the “financially constrained” and “preferred” systems of improvements such that implementation of all RTP projects would cost more than twice the anticipated funding; and

WHEREAS, the first phase of the update included a formal scoping period to build agreement on the overall approach for the RTP update and develop a work program to guide the process; and

WHEREAS, the Metro Council, the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), Metro Technical Advisory Committee (MTAC), Transportation Policy Advisory Committee (TPAC), the Regional Travel Options (RTO) Subcommittee of TPAC and the Bi-State Transportation Committee and other elected officials, city and county staff, and representatives from the business, environmental, and transportation organizations from the Portland-Vancouver metropolitan region discussed key issues to be addressed as part of this update; and

WHEREAS, Metro and the Consultant team prepared a draft work program that responds to key issues identified during the discussions that was released for review from May 10, 2006 through May 24, 2006; and

WHEREAS, the technical and policy development component of the work program seeks to create a streamlined plan that better advances regional policies, public priorities and local efforts to implement the 2040 Growth Concept given rapid population growth and significant fiscal constraints in the region; and

WHEREAS, the public participation plan component of the work program seeks to actively engage and consult with transportation system providers, public agencies, business groups, community organizations, advocacy groups, state and federal resource agencies and the general public (including traditionally under-represented groups) in plan development through the use of targeted, yet representational outreach techniques; and

WHEREAS, the Metro Committee for Citizen Involvement reviewed the public participation plan component of the work program on June 7, 2006; and

WHEREAS, a revised work program that responds to comments received from Metro Advisory Committees, Federal Highway Administration Division Office staff and Federal Transit Administration Regional Office staff is set forth in Exhibit A; and

WHEREAS, the Metro Council authorizes the Chief Operating Officer to have staff amend Metro Contract No. 926975, Amendment #2, for additional time, budget and scope for consulting services identified in Exhibit A, for the period from February 17, 2006 to June 30, 2007, not-to-exceed \$410,000; now, therefore;

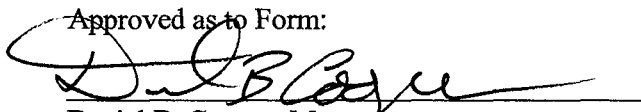
BE IT RESOLVED:

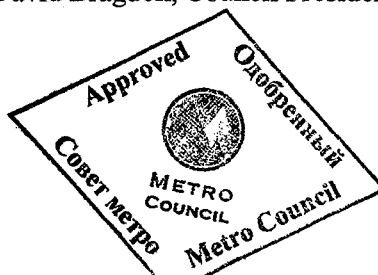
1. The Metro Council approves the 2035 RTP Update work program, identified in Exhibit A, which Metro will use to create an updated RTP that responds to the New Look policy direction and prioritizes transportation investments to best meet desired outcomes within fiscal constraints.
2. The Metro Council authorizes the Chief Operating Officer to have staff amend Metro Contract No. 926975, Amendment #2, for additional time, budget and scope for consulting services identified in Exhibit A, for the period from February 17, 2006 to June 30, 2007, not-to-exceed \$410,000.

ADOPTED by the Metro Council this 15th day of June 2006.


David Bragdon, Council President

Approved as to Form:


Daniel B. Cooper, Metro Attorney





METRO

2035 REGIONAL TRANSPORTATION PLAN UPDATE

WORK PROGRAM

BACKGROUND

Metro is starting the first significant update to the Portland metropolitan region's long-range transportation plan in six years.¹ This is the first major update to the Regional Transportation Plan (RTP) since 2000, which was the first truly multi-modal plan to fully embrace the policies and vision for 2040 Growth Concept. The RTP serves as the threshold for all federal transportation funding in the Portland metropolitan region. As the federally designated Metropolitan Planning Organization (MPO), Metro is responsible for coordinating the distribution of these funds through the RTP and Metropolitan Transportation Improvement Program (MTIP). The region is experiencing unprecedented growth and increasing competition for limited funds. The current plan includes projects that would cost more than twice the anticipated funding. This update will involve a new approach to address these realities – an approach that uses desired outcomes to define, evaluate and prioritize the most critical transportation investments in the region and integrates land use, economic, environmental and transportation objectives in the context of the New Look.

This document is a work program for an update to the Regional Transportation Plan (RTP). It has two parts:

- The Technical Analysis Plan (TAP) addresses the *technical and policy development* components that will support the creation, evaluation, and adoption of a new 2035 Regional Transportation Plan (RTP).
- The Public Participation Plan (PPP) addresses *stakeholder engagement and outreach* components that will inform development, evaluation and adoption of an updated 2035 RTP.

Prepared by Metro staff and the ECONorthwest team², the work program and public participation plan integrates with the overall New Look planning process, coordinates with development of a *Regional Plan for Freight and Goods Movement* and *Regional Transportation System Management and Operations Plan*, and responds to key technical, policy and process issues identified by the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) in March and by Regional Transportation Forum participants on April 20 as part of the Scoping Phase.³

¹ There were minor updates in 2002 and 2003-04, designed to keep the RTP in compliance with state regulations and federal changes to transportation laws.

² ECONorthwest (ECO), Moore Iacofano Goltsman, Inc. (MIG), Kittelson and Associates (KAI), Siegel Consulting, and Moore Information.

³ Readers wanting additional background information can go to <http://metro-region.org/rtp> (click on *2035 RTP Update* to go to

This document has four sections:

- **Overview of the RTP** provides context for the RTP update, summarizing Metro’s role in transportation planning and the decision-making framework that guides these activities, and the specific issues and objectives to be addressed as part of the 2035 RTP update.
- **Technical Analysis Plan** describes the major technical and policy development tasks to be completed during the 2035 RTP update. The tasks are organized by project phase.
- **Public Participation Plan** describes the stakeholder engagement and outreach components that will inform development of an updated 2035 RTP plan and support the decision-making role of the Metro Council, Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Policy Advisory Committee (MPAC) and the participatory role of public agencies, other identified stakeholder groups and the general public.
- **Appendices** provide more detailed descriptions of elements referenced in the Overview section.

The work program and was reviewed and refined by Metro’s Advisory Committees prior to Metro Council approval.

1.0 OVERVIEW OF THE RTP

WHAT IS A REGIONAL TRANSPORTATION PLAN?

Metropolitan areas with populations over 50,000 people are required by federal law to have a Metropolitan Planning Organization (MPO), and those organizations are required to prepare regional transportation plans that describe, among other things, how federal and state funds for transportation projects and programs will be spent. An MPO must create an RTP that identifies the transportation investments it will make with those funds for at least a 20-year planning period. The plan must be updated at least every four years.

The RTP is the threshold for all federal transportation funding in the region. Federal rules require the RTP to be financially constrained—that the estimated costs of the identified projects not exceed an estimate of revenues that are “reasonably anticipated to be available” for the plan period. A transportation project is eligible for federal transportation funds distributed through Metro if it is included in the financially constrained system and is consistent with federal air quality standards. Though there are many requirements (federal and state) and planning standards that affect the content of an RTP, it is fundamentally about making good choices about transportation investments that support the 2040 Growth Concept in the face of competition for limited funds.

WHAT IS METRO’S ROLE IN TRANSPORTATION PLANNING

Metro is the regional government responsible for regional land use and transportation planning under state law and the federally designated metropolitan planning organization (MPO) for the Portland metropolitan area. Metro’s transportation planning activities are guided by a decision-making framework that consults and coordinates the perspectives of federal, state, regional and local government agencies, citizens and interest groups as part of the process.

the project web page).

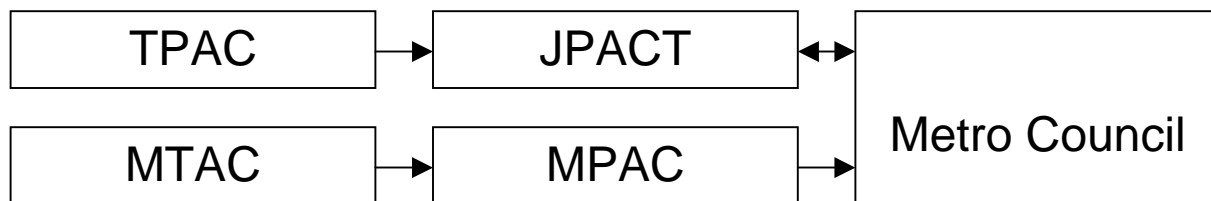
Metro's targeted stakeholders and planning partners include the 25 cities, three counties and affected special districts of the region, Oregon Department of Transportation (ODOT), Oregon Department of Environmental Quality, Port of Portland, SMART, TriMet and other interested community, business and advocacy groups as well as state and federal regulatory officials. Metro also coordinates with the City of Vancouver, Clark County Washington, the Port of Vancouver, the Southwest Washington Regional Transportation Council (RTC), C-Tran, the Washington Department of Transportation, the Southwest Washington Air Pollution Control Authority and other Clark County governments on bi-state issues. This broad spectrum of stakeholders is the primary focus of the public participation plan.

REGIONAL CONSULTATION, COORDINATION AND DECISION-MAKING STRUCTURE

Metro facilitates this consultation, coordination and decision-making through four advisory committee bodies –the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC). In addition, the Metro Committee for Citizen Involvement (MCCI) provides advice to the Metro Council on how to best engage residents in regional planning activities. **Figure 1** displays the regional transportation decision-making process.

Figure 1.

Regional Transportation Decision-Making Process



Source: Metro

The 2035 RTP updating process will rely on this existing decision-making structure for development, review and adoption of the plan. MPAC, JPACT and the Metro Council will make recommendations at key decision points based on input from TPAC, MTAC, the Council-appointed Regional Freight Plan Task Force and the public participation process. SAFETEA-LU provisions also require additional consultation with state and federal resource agencies, and tribal groups not represented on Metro's existing committee structure. Opportunities for consultation with these groups will be identified in coordination with FHWA staff.

All transportation-related actions (including federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both bodies. Under state law, the RTP serves as the region's transportation system plan. As a result, the Metro Policy Advisory Committee (MPAC) also has a role in approving the regional transportation plan as a land use action, consistent with statewide planning goals and the Metro Charter.

The work program has been designed to build consensus on the 2035 RTP throughout the process. In the event that differences occur between MPAC and JPACT, joint MPAC/JPACT meetings will be held to discuss and reconcile differences on these and other critical policy issues. Opportunities to hold joint TPAC/MTAC workshops will also be identified throughout the process.

Finally, the *Regional Freight and Goods Movement Plan* element of the RTP update will also be guided by a Council-appointed 33-member Task Force and a Technical Advisory Committee (TAC).⁴ Recommendations from the Regional Freight TAC will be forwarded to the Regional Freight and Goods Movement Plan Task Force. The Task Force will make its recommendations to TPAC, JPACT and the Metro Council. The recommendations will be forwarded to the 2035 Regional Transportation Plan process for adoption into the region's long-range transportation system plan.

The roles and responsibilities and membership for each advisory committee is described in detail in **Appendix A**. Opportunities for additional stakeholder involvement will be provided as described in the public participation plan in **Section 3.0**.

FEDERAL, STATE AND REGIONAL CONTEXT

This planning effort will be conducted within the context of guiding federal, state, and regional transportation and land use policy and requirements. In addition, Metro is concurrently updating the region's long-range growth management plan, supporting transportation plan (the RTP), and implementation tools in its *New Look* planning effort. By working within the umbrella of the New Look, the RTP update will take into consideration how regional transportation investments affect land use, the economy and environmental quality. To understand how the RTP update fits in the context of the broader *New Look Regional Planning Process*, readers should refer to **Appendix A**.

Metro also will undertake a planning effort, in coordination with the update of the Regional Transportation Plan (RTP), which focuses specifically on the region's freight transportation system. To accomplish this work, Metro sought and was awarded a 2005-2007 Biennium Transportation & Growth Management Grant to prepare a regional plan for freight and goods movement.

Finally, Metro will undertake a planning effort, in coordination with the update of the Regional Transportation Plan (RTP), which focuses specifically on development of a Regional Transportation System Management and Operations Plan. Metro received a Federal Highway Administration grant to support this work.

KEY ISSUES TO ADDRESS

The region has aggressively implemented state policy calling for reduced reliance on any single mode of transportation. In practice, this has meant complementing the region's roads and highways with a comprehensive public transit network; taking seriously the needs of pedestrians and bicyclists in addition to cars; and integrating land use and transportation planning by promoting compact urban form and

⁴ The Regional Freight and Goods Movement Task Force will be comprised of 33 members from the community, private and public sectors, representing the many elements of the multimodal freight transportation system and community perspectives on freight. The Freight Technical Advisory Committee (TAC) will be comprised of public sector staff from the local, regional, and state agencies operating within Metro's jurisdictional boundaries. The TAC will provide input and review of technical work products.

mixed-use development. Providing for the region's current and future transportation needs will be made more difficult by three key challenges, all of which have important implications for the region's ability to achieve its economic and community goals.

- **Growth:** As the region expands to accommodate the one million new residents that are expected to be living here by 2030, major new transportation investments will be required to serve both developed and developing areas.
- **Congestion and impacts to the region's economy and quality of life:** A 2005 study found that the region's excellent rail, marine, highway, and air connections to national and international destinations position it as both a hub for the distribution of goods across the country and a gateway for global trade. These connections make the region's economy highly dependent on transportation. However, projected growth in freight and general traffic cannot be accommodated on the current system. Increasing congestion — even with currently planned investments — will harm the region's ability to maintain and grow business.
- **Funding:** State and local funding for roads and transit is failing to keep pace with current needs, to say nothing of the growth expected in the coming decades. Funding has been identified for less than half the \$10 billion cost of the projects in the current Regional Transportation Plan. Furthermore, these capital expenditures compete against critical needs for operations and maintenance of the existing transportation system.

To address these challenges, the traditional process the region uses to identify, evaluate and prioritize transportation improvements has been modified to use an outcomes-based planning approach, integrating land use, economic, environmental and transportation objectives in the context of the New Look. This focus on outcomes is described in more detail in **Appendix A**.

PROJECT GOALS

The following project goals will guide the overall approach for development of the 2035 Regional Transportation Plan.

- (1) Develop an updated 2035 RTP by November 2007 that complies with state and federal regulations and implements New Look policy direction.
- (2) Create an outcomes-based plan that better advances regional policies, public priorities and local efforts to implement the 2040 Growth Concept given the rapid population growth and dwindling financial resources in the region.
- (3) Actively engage and consult with transportation system providers, public agencies, business groups, community organizations, advocacy groups, state and federal resource agencies, and the general public (including traditionally under-represented groups) in plan development through the use of targeted, outreach techniques.

PROJECT OBJECTIVES

The following project objectives direct the development of the 2035 Regional Transportation Plan. The project will:

- ✓ Improve community awareness and understanding of regional transportation system needs and funding issues.
- ✓ Develop a set of desired outcomes that reflect public priorities for managing and improving the regional transportation system.
- ✓ Develop an outcomes-based evaluation approach and performance measures to assess 2040 implementation, regional transportation needs and deficiencies, and measure and prioritize transportation projects.
- ✓ Analyze current fiscal realities, transportation funding trends and transportation funding options to inform development of an updated *financially constrained* revenue forecast.
- ✓ Identify issues, needs and deficiencies in the regional transportation system and develop recommended solutions and strategies to address them in support of the Region 2040 Growth Concept.
- ✓ Assess and refine current regional transportation policies to implement public priorities and the New Look policy direction.
- ✓ Reconsider projects in the current RTP based on revenue availability, public priorities and New Look policy direction.
- ✓ Prioritize infrastructure, system management and demand management projects and programs for all travel modes to meet the desired outcomes and implement the New Look policy direction.
- ✓ Assess and refine current implementation strategies, including performance measures and corridor refinement studies, to implement public priorities and the New Look policy direction to achieve desired outcomes.
- ✓ Integrate with planning efforts to update the Region 2040 Growth Concept implementation tools (*New Look*) and develop the *Regional Freight and Goods Movement Plan* and the *Metro-Region Plan for Transportation System Management and Operations* (TSMO).
- ✓ Comply with Oregon's Statewide Planning Goals and the Federal SAFETEA-LU provisions.

2.0 TECHNICAL ANALYSIS PLAN

The following section summarizes major technical and policy development tasks to be completed by Metro staff and the consultant team during the 2035 RTP update. The tasks are organized by project phase. The activities described in this section will be integrated with the public participation plan described in **Section 3.0**. A major milestone chart in **Appendix B** graphically displays the overall timeline, key decision points, tasks, products and outreach strategies of each phase.

PHASE 1: SCOPING (FEBRUARY – JUNE 2006)

Objective: Develop a work program for technical work and policy development and public participation plan with the Metro Council, JPACT and other key stakeholders that supports development of an updated Regional Transportation Plan by November 2007, incorporates a planning approach based on outcomes for prioritizing transportation investments and meets regional, state and federal planning requirements.

This phase develops a detailed scope of work that will guide the technical work and policy development and public participation plan through the subsequent phases of the 2035 RTP update. It ends when the Metro Council reviews and approves the overall work program in June 2006.

PHASE 2: 2040 RESEARCH AND POLICY DEVELOPMENT TASKS (JUNE –DEC. 2006)

Objectives: Identify the existing regional transportation issues, needs and deficiencies and assess 2040 implementation. Investigate financial, transportation, land use, and economic/demographic trends that influence regional development and the performance of the regional transportation system. Identify public priorities for transportation and willingness to pay for desired transportation services and programs.

Task 1: Data Review and Collection (June - July 2006)

Objectives: Identify available financial forecast data, transportation modeling, economic/demographic data, environmental data, and corridor-level transportation system data. Collect and organize the data necessary to support the RTP update technical and financial analysis. Establish the common transportation network and base travel demand forecast to be used to compare the 2035 Base Case, to New Look policy alternatives and the discussion draft Regional Transportation Plan.

Responsibility: Metro will lead this task with participation from TPAC to review 2035 Base Case transportation network.

Task 2: Develop Outcomes-Based Evaluation Framework (June – Sept. 2006)

Objective: Develop an outcomes-based evaluation approach and identify criteria/performance measures in the context of the New Look process to assess the state of transportation in the region, regional transportation needs and deficiencies, and measure, prioritize and select regional transportation projects and programs.

Sub-task 2.1: Develop Outcomes-Based Evaluation Framework. Contractor will work with Metro staff to define a framework to identify and evaluate a set of desired outcomes that will guide recommendations for policy, infrastructure and system management projects, and implementation strategies pertaining to the regional transportation system. Contractor will work with Metro staff to identify a small (5 – 6) number of categories of outcomes.

Responsibility: Contractor will lead this task with assistance from Metro and input from Advisory Committees and the Metro Council.

Sub-task 2.2: Define Regional Transportation System. Determine what constitutes the regional transportation system to be evaluated by the outcomes-based framework.

Responsibility: Metro will lead this task with and participation by TPAC, JPACT and the Metro Council.

Sub-task 2.3: Develop Outcomes-Based Performance Measures. Contractor will work with Metro staff to identify a set of performance measures for each of the categories of outcomes. The measures will be used to help assess transportation system conditions and land use/transportation scenarios in Phase 2, prioritize transportation projects and program in Phase 3 and periodically monitor successful implementation of the RTP over time. The measures will include transportation performance measures and other measures to address impacts to the built and natural environment, and to other aspects of quality of life as appropriate. Measures could include: travel performance (e.g., vehicle miles traveled and travel time), safety (e.g., reduction in bike and pedestrian fatality/severe injury rate, miles of bike and pedestrian facilities), congestion management (e.g., percentage decrease in delay), equity/public amenities (e.g., households and jobs within ¼-mile of high quality transit), and environmental impact (e.g., acres of impervious surface and number of stream crossings).

Responsibility: Contractor will lead this task with assistance from Metro, participation by the Metro Council, JPACT and MPAC, and input from Advisory Committees.

Sub-task 2.4: Prepare documentation. Contractor will prepare an Outcomes-Based Evaluation Framework Technical Memorandum, documenting these tasks. Metro will provide review and comment on draft Outcomes-Based Evaluation Framework Technical Memorandum.

Responsibility: Contractor will lead this task with assistance from Metro. MPAC, JPACT and the Metro Council will approve the outcomes-based evaluation performance measures with input from Advisory Committees.

Task 3: Identify Public Priorities and Desired Outcomes for Transportation (June – Dec. 2006)

Objectives: Identify public priorities for transportation and the public's willingness to pay for desired levels of transportation services and programs. Establish a set of desired outcomes that reflect public priorities for managing and improving the regional transportation system that will guide the development of policy, projects, programs and implementation strategies.

Sub-task 3.1: Identify Desired Outcomes for Transportation. Identifying public priorities and desired outcomes for transportation occurs as part of the public participation element of this scope of work described in Section 3. This task is mainly one of coordinating the technical work of Task 2, above, with the stakeholder and public outreach that is described in the Public Participation Plan (Section 3).

Responsibility: Contractor will lead this task with assistance from Metro and input from Advisory Committees and other stakeholders as identified in the Public Participation Plan.

Sub-task 3.2: Prepare documentation. Contractor will prepare a Public Priorities Report, executive summary, fact sheet, and Powerpoint presentation documenting the results of this task. Metro shall provide review and comment on draft Public Priorities Report and draft fact sheet.

Responsibility: Contractor will lead this task with input from Metro, MPAC, JPACT and the Metro Council will approve the set of desired outcomes with input from Advisory Committees.

Task 4: Financial Analysis (June – Oct. 2006)

Objectives: Investigate current fiscal realities and transportation funding trends; determine the reasonably anticipated local, regional, state and federal financial resources that would result from current funding trends; identify potential new revenue sources; and estimate the funding available for capital projects after necessary operation and maintenance costs and implications for the regional transportation system that result. Evaluate funding scenarios to address funding shortfall. Identify priorities for use of existing resources and for the use of potential resources. Develop a 2007-2035 revenue forecast for the 2035 Regional Transportation Plan that meets federal requirements.

Sub-task 4.1: Prepare methodology report. Review current financial cost and revenue data available from transportation agencies in region. Prepare methodology report for estimating and forecasting transportation costs and revenues in the Metro region that meets all the requirements and recommendations in the “Interim FHWA/FTA Guidance on Fiscal Constraint for STIPs, TIPs, and Metro Plans” released 6/27/05.

Responsibility: Contractor will lead this task with participation from ODOT, TriMet and SMART and local transportation agencies. Metro will coordinate compilation of available financial forecast data and review draft methodology report.

Sub-task 4.2: Analyze transportation funding trends. Investigate transportation funding trends, estimate current and future funding operations and maintenance shortfall for roads and transit and estimate “reasonably anticipated to be available” transportation revenues for the period from 2007 through 2035. Prepare technical memorandum documenting the following:

1. Estimate current road operations and maintenance costs and cost trends/issues for:
 - ODOT facilities in Metro region
 - Local transportation agencies in Metro area by regional and local facilities
2. Estimate current transit operations and maintenance costs and cost trends/issues for transit agencies in the Metro region considering:
 - current operating level of service
 - current maintenance costs
3. Forecast future road operations and maintenance costs
 - Forecast maintenance costs for ODOT and local transportation agencies through 2035
 - maintain current pavement conditions
 - improve pavement conditions to policy objective level (90% fair or better)
 - other maintenance measurements such as bridge, structures, culverts, etc.
 - define method for adding maintenance costs of planned system improvements once defined
4. Forecast future transit Operations and Maintenance Costs
 - Forecast operations costs per vehicle hour of service for transit agencies in Metro area for the period from 2007 through 2035

- Forecast maintenance costs of transit system in Metro area for the period from 2007 through 2035 and method for adding maintenance costs of planned system once defined
5. Estimate Transportation Revenues
- Summarize Metro area state and federal transportation revenues from State forecast for the period from 2007 through 2035
 - Determine current Metro area local transit agency revenues and forecast for the period from 2007 through 2035
 - Determine current Metro area local transportation revenues and forecast for the period from 2007 through 2035

Responsibility: Contractor will lead this task with input from Metro, and participation from ODOT, TriMet and SMART and local transportation agencies.

Sub-task 4.3: Financial scenario development and evaluation. Determine revenues available for capital improvements based on different levels of investment in the maintenance and operations of the road and transit systems. Transit system operation costs/revenues will be an iterative methodology utilizing the regional travel demand model. Develop and analyze up to four (4) funding scenarios to address the funding gap. This analysis should link raising revenue options with Budgeting for outcomes principles. Examples of the types of funding scenarios that could be examined include: tolls for state freeways, state gas taxes for state freeways, regional ballot measure for state freeways, state gas taxes for local maintenance, street utility fees for local maintenance, state gas taxes distributed on a formula basis for city/county arterials and collectors and system development charges for all expansion of arterial and collectors to meet population growth projections. Prepare technical memorandum that documents this sub-task.

Responsibility: Contractor will lead this task with input from Metro and participation from TPAC, JPACT and the Metro Council.

Sub-task 4.4: Define "Reasonably Available" future revenue sources. Identify new revenue sources forecast as available in the State revenue forecast. Identify expected new local revenue sources. Identify public-private partnerships forecast anticipated to be available (such as Oregon Innovative Public-Private Partnerships). Define actions necessary to implement these new revenue sources and document steps taken to date to address the necessary actions. Distinguish reasonably available funds from those not yet defined as reasonable available that may be identified in a strategy to finance "illustrative projects." Prepare technical memorandum that documents this sub-task.

Responsibility: Contractor will lead this task with input from Metro and participation from TPAC, JPACT and the Metro Council.

Sub-task 4.5: Financial Analysis and Revenue Forecast Report. The Contractor will compile all technical memoranda, with supporting graphics and data, to create a final report and appendices that document a 20-year revenue forecast for the 2035 Regional Transportation Plan and identifies priorities for use of existing resources and for the use of potential resources. The report shall document all cost estimation methodologies, forecast assumptions and scenarios utilized in the forecast and provide a complete assessment of the financial outlook of the transportation system in the region with assurances and/or disclaimers, in the opinion of the consultant, as to the accuracy of data collected and confidence in forecasted numbers provided. The Contractor will prepare an executive summary and Powerpoint presentation to highlight the forecasts by scenario, referencing any pertinent information in the main report. Metro will review draft final report and prepare a 2-4 page fact sheet summarizing the results of this analysis.

Responsibility: Contractor will lead this task with input and assistance from Metro. JPACT and the Metro Council will approve the financially constrained revenue forecast with input from Advisory Committees.

Task 5: Land Use/Transportation Scenario Analysis (July - October 2006)

Sub-task 5.1: Develop Land Use/Transportation Scenario Analysis Framework. Contractor will work with Metro staff to define a framework to identify and evaluate a set of land use and transportation scenarios that will inform recommendations for policy, infrastructure and system management projects, and implementation strategies pertaining to the regional transportation system and the broader New Look context future growth vision and implementation strategies.

Responsibility: Metro will lead this task with assistance from Contractor, participation from the Metro Council and input from Advisory Committees and other stakeholders identified in the public participation plan.

Sub-task 5.2: Land Use/Transportation Scenario Analysis. Metro staff will identify and evaluate a set of land use and transportation scenarios using the outcomes-based framework defined in Task 2 that will inform recommendations for policy, infrastructure and system management projects, and implementation strategies pertaining to the regional transportation system and the broader New Look future growth vision and implementation strategies.

Responsibility: Metro will lead this task with assistance from Contractor, participation from the Metro Council and input from Advisory Committees and other stakeholders identified in the public participation plan.

Task 6: 2035 Base Case Travel Forecasting Analysis (June – Aug. 2006)

Objective: Identify the year 2035 regional transportation needs and deficiencies based on travel demand forecasts that represent relevant adopted plans, population/employment forecast based on current state law for urban growth boundary expansions and current Financially constrained system of projects in the region. This work will be coordinated with the Investing in Communities and Shape of the Region elements of the New Look.

Sub-task 6.1: Travel Demand Forecasting. Metro will prepare and conduct travel demand forecasting of the 2005 Base Year and 2035 Base Case travel forecast. The 2035 Base Case forecast is based on current state law for urban growth boundary expansions and current financially constrained system of projects in the region.

Responsibility: Metro will lead this task with review of 2035 Base Case network by TPAC.

Sub-task 6.2: Base Case Transportation System Analysis. Metro will analyze the travel demand forecasting results of the 2005 Base Year and 2035 RTP forecast using the evaluation approach defined in Phase 2 if available. The travel forecasting analysis will include: auto, truck and transit volumes; congestion levels, speed, and other information needed to assess the impacts of the RTP systems during the 2-hour AM and 2-hour PM peak periods, and the 1-hour mid-day.

Responsibility: Metro will lead this task with participation from TPAC and assistance from Contractor with analysis of travel outputs. TriMet will assist with analysis of transit network outputs.

Sub-task 6.3: Base Case Transportation System Analysis Documentation. Metro will prepare a Base Case Transportation System Analysis report, fact sheet summarizing analysis and Powerpoint presentation, documenting these tasks. The final report will document model assumptions and analysis results.

Responsibility: Metro will lead this task with participation from TPAC.

Task 7: Economic/Demographic Analysis (June – Sept. 2006)

Objective: Investigate regional economic and demographic trends, including population and household growth, travel characteristics, employment trends (by industry and occupation), labor force characteristics and other key economic indicators that influence regional growth and development and impact the regional transportation system. This work will be coordinated with the Investing in Communities and Shape of the Region elements of the New Look, and be reviewed by the Council of Economic Advisors. The following information and products will be created by Metro as part of this task:

Sub-task 7.1: Forecast Growth Analysis. Metro will analyze forecasted growth from Year 2005 to 2035 in the 4-county Metro region and prepare a memo and fact sheet with charts and graphics summarizing data and key findings on implications for transportation.

Responsibility: Metro will lead this task.

Sub-task 7.2: Growth in Household and Population Analysis. Metro will analyze household and population growth from Year 1990 to 2000 for the 4-county Metro region and Metro urban growth boundary using U.S. census data. More recent will be used if available. Metro will prepare a memo and fact sheet with charts and graphics summarizing data, including 2000 population spatial distribution, and key findings on implications for transportation.

Responsibility: Metro will lead this task.

Sub-task 7.3: Growth in Jobs and the Economy Analysis. Metro will analyze employment growth by different sectors from Year 1990 to 2000 for the 4-county Metro region and Metro urban growth boundary using U.S. Census data. More recent will be used if available. Metro will prepare a memo and fact sheet with charts and graphics summarizing data, including 2000 employment spatial distribution, and key findings on implications for transportation.

Responsibility: Metro will lead this task.

Sub-task 7.4: Growth in Neighbor Cities Analysis. Metro will analyze household, population and employment growth from Year 1990 to 2000 for neighbor cities using U.S. census data. More recent will be used if available. Metro will prepare a memo and fact sheet with charts and graphics, summarizing data and key findings on implications for transportation.

Responsibility: Metro will lead this task.

Sub-task 7.5: Regional Travel Characteristics Analysis. Metro will analyze regional travel characteristics from Year 1990 to 2000 for the 4-county region using U.S. census data and other sources (including more recent data) when available. Metro will prepare a memo with charts and graphics summarizing data, and key findings on implications for transportation. Examples of data to be analyzed include:

- Work and non-work trips by mode
- Commute patterns and percent of all trips
- Non-work trip patterns and percent of all trips

- Typical trip purposes for the daily trips made by an average household
- Average commute distance
- Average commute time
- Daily vehicle miles traveled per capita
- Daily trips per household

Responsibility: Metro will lead this task.

Sub-task 7.6: Regional Environmental Justice Analysis. Metro will analyze environmental justice communities as defined by 2000 Census block groups containing a concentration of minority populations (African-American, Hispanic or Asian) and/or containing a concentration of households below the poverty line for the 3-county region using U.S. census data and other data sources (including more recent data) when available. Metro will prepare a memo and fact sheet with charts and graphics, summarizing data and key findings on implications for transportation, both in terms of serving these populations and engaging them when affected by transportation planning and/or investments.

Responsibility: Metro will lead this task.

Task 8: Environmental Analysis (June - July 2006)

Objective: Identify existing natural, historic and cultural resources using existing available data to support system level technical analysis of environmental trends and issues as they relate to the regional transportation system and identification of environmental mitigation strategies during Phase 3. The data collection will be conducted as part of the Shape of the Region element of the New Look. Examples of the types of data being collected include:

- Metro Goal 5 inventory
- Wetlands as documented on the National Wetland Inventory
- Inventory of ESA species on record (no primary research is included in inventory)
- EFU/Forest land as designated by local zoning
- Scenic/Historic/Backcountry Roads, Byways, and Trails as designated by the FHWA, US Department of the Interior and ODOT
- Floodplain locations as determined by the FEMA
- Superfund sites as determined by the US EPA
- Historic properties and districts listed on the National Register of Historic Places
- Existing Federal (US BLM, US Army Corps of Engineers, US Forest Service, US Bureau of Reclamation, US Fish and Wildlife Service) and State owned/managed recreation facilities, National Wildlife Refuges, Recreation Areas and Forests
- Existing City, County, Regional and State public parks, trails and recreational facilities
- Metro wildlife hotspots incident locations
- Metro inventory of culverts that block fish passage

- State Historic Preservation Office likely archeologically-sensitive areas
- Oregon Department of Fish and Wildlife conservation opportunity area maps
- Oregon Department of Fish and Wildlife, National Marine Fisheries and U.S. Fish and Wildlife sensitive species lists
- Maps of previous Oregon Department of Transportation mitigation sites
- Division of State Lands existing mitigation banks and service areas
- Potential Oregon Department of Transportation mitigation banks and service areas
- Water quality limited bodies as defined by Oregon Department of Environmental Quality
- National Marine Fisheries and U.S. Fish and Wildlife recovery and conservation plans

Responsibility: Metro will lead this task.

Task 9: Transportation System Conditions Analysis (June – Oct. 2006)

Objective: Identify the existing regional transportation issues, needs and implications for regional growth trends and effective multimodal people and goods movement in the Portland metropolitan region. This work will be coordinated with the Investing in Communities and Shape of the Region elements of the New Look, the Regional Freight and Goods Movement Plan and Regional Transportation System Management and Operations Plan work program activities.

Sub-task 9.1: Roadways System Conditions Analysis. Metro will develop a comprehensive base of information on the characteristics of the region's multi-modal roadway system using existing data sources available from ODOT, Portland State University Center for Transportation Studies and local transportation agencies. The following activities will be completed as part of this task:

- Review the existing regional roadway functional classifications to identify gaps and/or inconsistencies on the regional network.
- Develop inventory of miles of roadways (interstate, arterials and collectors), pavement condition, bridge locations and existing average daily traffic count data for key highways/arterials in the region.
- Document current transportation system management and operations efforts in the region and their effects.
- Conduct Congestion Management Process (CMP) analysis to identify congestion hot spots and average travel speeds for the CMP network as defined in the 2006-07 Unified Planning Work Program and implications for people and goods movement.
- Conduct a roadway safety analysis, including the identification of the top 20 crash locations by County.
- Prepare memo and graphics documenting roadway system conditions analysis.

Responsibility: Metro will lead this task with participation by local transportation agencies and the TRANSPORT subcommittee.

Sub-task 9.2: Regional Freight System Conditions Analysis. Metro will develop a comprehensive base of information on the characteristics of the region's multimodal freight system including industry trends, shipper logistics stories, freight system profiles, and freight traffic generator characteristics.⁵ The Freight System Profiles are a series of profiles for each of the key elements of the regional freight system that document their physical, operational, and market characteristics, including trucks, air cargo, marine cargo, freight rail and gas lines/pipe lines. Metro will prepare memo, fact sheet and graphics documenting freight system conditions analysis.

Responsibility: Metro will lead this task with participation by the Regional Goods Movement TAC and Task Force.

Sub-task 9.3: Regional Transit System Conditions Analysis. Metro will develop a comprehensive base of information on the characteristics of the region's multimodal transit system using existing data sources from TriMet and SMART. The following activities will be completed as part of this task:

- Inventory of existing routes and facilities (e.g., intercity bus service, intercity passenger rail service, transit centers, major transit stops, park-and-ride lots), transit ridership and revenue hours, park-and-ride lot usage and other capital elements (shelters, transit tracker, low-floor stops).
- Document current transportation system management and operations efforts in the region and their effects.
- Conduct safety analysis using existing data sources and document security efforts of each transit service provider.
- Prepare memo, fact sheet and graphics documenting transit system conditions analysis.

Responsibility: Metro will lead this task with participation by TriMet and SMART.

Sub-task 9.4: Regional Bicycle and Pedestrian System Conditions Analysis. Metro will develop a comprehensive base of information on the characteristics of the region's bike and pedestrian system using the existing pedestrian system inventory and Metro Bike There Map data. This will not include a detailed review of sidewalk or bike facility conditions. The following activities will be completed as part of this task:

- Identify corridor-level pedestrian and bicycle deficiencies and missing links to key generators and destinations, including the regional trail system and the regional transit system.
- Conduct bike and pedestrian safety analysis.
- Prepare memo, fact sheet and graphics documenting bike and pedestrian system conditions analysis.

Responsibility: Metro will lead this task with participation by local transportation agencies, TriMet and SMART.

⁵ This task will be completed as part of the Regional Freight Plan work program activities and forwarded to the 2035 RTP update.

Sub-task 9.5: Regional Travel Options Program Analysis. Metro will develop a comprehensive base of information on the characteristics of the Regional Travel Options (RTO) Program. This work will be conducted as part of development of the RTO Annual Report and will include the following data and activities:

- Inventory Transportation Management Associations (TMAs) and evaluate performance
- Inventory and evaluate collaborative marketing efforts (includes TravelSmart, TriMet employer program, SMART TDM program and travel options marketing campaign)
- Inventory and evaluate Rideshare program (regional vanpool program and carpool matching)
- Other RTO program monitoring efforts and findings.
- Prepare memo, fact sheet and graphics documenting RTO program analysis.

Responsibility: Metro will lead this task with participation by the RTO Subcommittee.

Sub-task 9.5: Regional Security Analysis. Metro will document existing security strategies, programs, policies, activities, and actions currently in plan in the Portland metropolitan region in response to September 11, 2001. The following activities will be completed as part of this task:

- Document existing security plans, manuals, procedures and policies at state and regional level.
- Develop recommendations for short-term mid-term and long-term strategies to strengthen these efforts.
- Prepare memo, fact sheet and graphics documenting the security analysis.

Responsibility: Metro will lead this task with participation by the Regional Emergency Management Group and the region's transit agencies and Port districts.

Sub-task 9.6: Regional Elderly and Disabled Transportation Planning Analysis. Metro will document recommendations from the update of the Tri-County Elderly and Disabled Transportation Plan (EDTP) anticipated to be completed mid-2006. The planning effort is focused on assessing potential gaps in providing coordinated transportation services for elderly, disabled and low-income persons and updating new service standards for providing transportation services for the elderly and persons living with disabilities. Elements of the updated EDTP will be coordinated with and implemented through the 2035 Regional Transportation Plan. The following activities will be completed as part of this task:

- Document EDTP recommendations for the 2035 RTP and strategies to strengthen these efforts.
- Prepare memo, fact sheet and graphics documenting the results of the EDTP effort and relationship to the 2035 RTP.

Responsibility: Metro will lead this task with participation from TriMet and SMART.

Task 10: System Assessment (Sept. – Nov. 2006)

Objectives: Develop a comprehensive assessment of the regional transportation system issues, needs and deficiencies, and the affect of the transportation system on land use patterns and desired outcomes. Use assessment to improve community and stakeholder awareness and understanding of regional

transportation system needs and funding issues and to inform New Look policy direction, including prioritization of desired outcomes. The following activities will be completed as part of this task:

- Prepare final report, fact sheet, Powerpoint and graphics documenting results of the public opinion research and financial, base case, demographic and system conditions analysis and possible strategies to address system needs and funding issues.
- Publish report on the “State of Transportation in the Region.”

Responsibility: Metro will lead this task with input from Contractor and participation from Advisory Committees, JPACT and the Metro Council.

PHASE 3: SYSTEM DEVELOPMENT AND POLICY ANALYSIS (JAN. - SEPT. 2007)

Objective: Develop a financially constrained system of projects and programs that address transportation issues/needs, achieve desired outcomes for transportation and implement the New Look policy direction. Evaluate performance of the financially constrained transportation system and document findings. Prepare a discussion draft Regional Transportation Plan that identifies a set of consistent outcomes, policies, strategies and performance measures, implements the New Look policy vision and meets state and federal planning requirements.

Task 1: Policy Development (Jan. – March 2007)

Objectives: Review and recommend refinements to the regional transportation system policies (Chapter 1) that respond to desired outcomes and New Look policy direction for transportation priorities. Identify the policy issues that need to be addressed at the regional and the local (county & city) level and develop complementary policy recommendations.⁶

Responsibility: Metro will lead this task with participation from Advisory Committees.

Task 2: Outcomes-Based Transportation Solutions Identification and Prioritization (Feb. – April 2007)

Objectives: Conduct a process to solicit projects for consideration in RTP financially constrained system using evaluation and project solicitation approach defined in Phase 2. Identify and prioritize regional transportation system and program improvements using the updated policies and the desired outcomes as a guide.

Sub-task 2.1: Solicit Transportation Solutions. Metro will solicit infrastructure, demand management and system management projects and programs for consideration in RTP financially constrained system using evaluation and project solicitation approach defined in Phase 2. Agencies responding to that solicitation will be asked to provide information, to the extent practical, on the “outcome measurements” identified in Phase 2 and on planning-level project costs.

Responsibility: Metro will lead this task with participation from ODOT, local transportation agencies, TriMet and SMART and input from Advisory Committees and stakeholders as identified in the Public participation plan.

Sub-task 2.2: Create RTP Database. Metro will create a RTP project and program database that includes: transportation need to be addressed, outcome project will address, project description and location, travel forecasting assumptions (e.g., number of lanes, capacity, speed), right-of-way needs, cost estimates, potential funding source(s), recommended timing for implementation and other information.

Responsibility: Metro will lead this task with participation from ODOT, local transportation agencies, TriMet and SMART.

Sub-task 2.3: Prioritize Transportation Solutions. Metro will facilitate a process for JPACT and the Metro Council to prioritize infrastructure, demand management and system management projects and

⁶ The freight element of this task will be completed as part of the Regional Freight Plan work program activities and forwarded to the 2035 RTP update.

programs for consideration in RTP financially constrained system using evaluation and project solicitation approach defined in Phase 2 and New Look policy direction for transportation investments.

Responsibility: Metro will lead this task with assistance from Contractor. JPACT and the Metro Council will prioritize financially constrained projects based on input from Advisory Committees.

Sub-task 2.4: Prepare Transportation Priorities Documentation. Metro will prepare a Transportation Priorities Report to document these tasks.

Responsibility: Metro will lead this task.

Task 3: System Development and Analysis (May – Aug. 2007)

Objectives: Analyze performance of the 2035 RTP committed, financially constrained and illustrative systems using the evaluation approach defined in Phase 2 and New Look policy direction and recommended future growth vision (updated 2035 forecast). Refine RTP policies, projects, and performance measures as needed to respond to system performance and desired outcomes.

Sub-task 3.1: Travel Demand Forecasting. Metro will prepare and conduct travel demand forecasting of the RTP committed, financially constrained and illustrative systems using the evaluation approach defined in Phase 2 and updated 2035 forecast. The RTP systems will be developed into auto and transit networks for Metro's travel forecasting model. It is anticipated that full travel demand model runs will be prepared for each RTP system. Metro will provide travel projections for the planning year of 2035 for each system. The travel forecast analysis will include: auto, truck and transit volumes; congestion levels, speed, and other information needed to assess the impacts of the RTP systems during the 2-hour AM and 2-hour PM peak periods, and the 1-hour mid-day.

Responsibility: Metro will lead this task with participation from TPAC. TriMet and SMART will assist with development of transit networks.

Sub-task 3.2: Transportation System Analysis. Metro will analyze the travel demand forecasting results of the RTP committed, financially constrained and illustrative systems using the evaluation approach defined in Phase 2 and updated 2035 forecast. Metro will analyze the impacts of the RTP Financially Constrained System on the built, cultural and natural environment using Geographic Information System (GIS) data and other available environmental data identified in Phase 2 Task 8. The level of detail of the environmental analysis will be at a system-level to be determined in consultation with Federal Highway Administration and Federal Transit Administration staff to ensure adequate consideration of the National Environmental Policy Act (NEPA) in transportation system planning. The analysis will describe impacts to the built, cultural and natural environment, transportation performance and other results.

Responsibility: Metro will lead this task with participation from TPAC and assistance from Contractor with analysis of travel outputs. TriMet will assist with analysis of transit network outputs and documentation of system level capital, operations and maintenance costs.

Sub-task 3.3: Transportation System Analysis Documentation. Metro will prepare a Transportation System Analysis report, documenting these tasks and identifying recommended refinements to RTP policies, projects, programs, and performance measures as needed to respond to environmental impacts, system performance and desired outcomes.

Responsibility: Metro will lead this task with assistance from Contractor and participation from Advisory Committees.

Task 4: Implementation Strategies (June – Aug. 2007)

Objective: Review and recommend refinements to the RTP implementation strategies and requirements (Chapter 6) to address regional transportation system needs and issues, and respond to desired outcomes, New Look policy direction and updated regional transportation policies. Identify a set of performance measures (i.e., benchmarks) for the identified desired outcomes that can be applied to periodically monitor successful implementation of the RTP over time.

Examples:

- Congestion mitigation strategies
- Modal strategies
- Transportation system management and operations strategies
- Transportation demand management strategies
- Land use and economic development strategies
- Environmental and neighborhood impacts and mitigation strategies
- Financing strategies
- New urban area planning strategies
- Corridor planning strategies
- Benchmarks to monitor progress toward plan implementation

Sub-task 4.1: Update Implementation Strategies. Metro will update Chapter 6 of the RTP to reflect findings and recommendations from all previous tasks.

Responsibility: Metro will lead this task with input from Advisory Committees and the Metro Council.

Task 5: Develop Discussion Draft Regional Transportation Plan (May – Aug. 2007)

Objective: Prepare a discussion draft RTP for 45-day public review and comment based on information, findings and recommendations from all previous tasks.

Responsibility: Metro will lead this task with input from Advisory Committees. MPAC, JPACT and the Metro Council will release the discussion draft plan for a formal 45-day public comment period.

PHASE 4: ADOPTION PROCESS (SEPT. – NOV. 2007)

Objective: Provide an opportunity for interested parties to express ideas and concerns about the discussion draft plan policies, projects and implementation strategies. Provide detailed information about the 2035 RTP update, decision-making process, technical analysis and project timeline. Compile a public comment report that responds to all comments received prior to the final decision by JPACT and the Metro Council. Adopt 2035 RTP by November 2007.

Task 1: Solicit Comments on Discussion Draft 2035 RTP (Sept. – Oct. 2007)

Objective: Conduct a process for interested parties to express ideas and concerns about the discussion draft plan policies, projects and implementation strategies (including a draft regional investment strategy) as described in the Public Participation Plan.

Responsibility: Metro will lead this task with assistance from Contractor and input from Advisory Committees and other stakeholders as defined in the public participation plan. Metro will consult with the Collaborative Environmental and Transportation Agreement for Streamlining (CETAS) group as part of this task.

Task 2: Prepare Public Comment Report (Sept. – Oct. 2007)

Prepare a report documenting all public comments received for consideration prior to final decision by JPACT and the Metro Council.

Responsibility: Metro will lead this task with assistance from Contractor.

Task 3: Refine Discussion Draft 2035 RTP (Sept. – Oct. 2007)

Refine 2035 RTP based on public comments for consideration prior to final decision by JPACT and the Metro Council.

Responsibility: Metro will lead this task with input from Contractor and from Advisory Committees. MPAC, JPACT and the Metro Council will approve a final draft 2035 RTP that meets state and federal planning requirements, pending the air quality conformity analysis to be conducted in Phase 5.

PHASE 5: POST-ADOPTION FEDERAL AND STATE CONSULTATION (DEC. 2007. - MARCH 2008)

Objective: Complete air quality conformity determination to corroborate that the updated plan meets federal and state air quality requirements. Submit the updated plan to federal and state regulatory agencies for approval, prior to the current plan's expiration in March 2008.

Task 1: Conduct 2035 RTP Air Quality Conformity Determination Process (Dec. 2007 – March 2008)

Objectives: Analyze the air quality impacts of the 2035 RTP Financially Constrained System, document methodologies and findings in Air Quality Conformity Determination report and provide an opportunity for public comment prior to approval by JPACT and the Metro Council.

Sub-task 1.1: Air Quality Conformity Consultation. Consult with state and federal regulatory agencies to review conformity methodologies and procedures.

Responsibility: Metro will lead this task with participation from TPAC. Local transportation agencies will provide documentation of recently constructed or funded regionally significant projects to be included in the conformity analysis.

Sub-task 1.2: Air Quality Conformity Analysis. Analyze and document the air quality impacts of the 2035 RTP Financially Constrained System using the regional travel demand model following the methodologies agreed to in Subtask 1.1.

Responsibility: Metro will lead this task with participation from TPAC, JPACT and the Metro Council.

Sub-task 1.3: Solicit Comments on 2035 RTP Air Quality Conformity Determination. Conduct a process for interested parties to express ideas and concerns about the air quality conformity methodology and results.

Responsibility: Metro will lead this task with participation from Advisory Committees and other stakeholders as defined in the public participation plan.

Sub-task 1.4: Prepare Public Comment Report. Prepare a report documenting all public comments received for consideration prior to final decision by JPACT and the Metro Council.

Responsibility: Metro will lead this task.

Sub-task 1.5: Approve Final 2035 RTP and Air Quality Conformity Determination. Consider public comments prior to final decision by JPACT and the Metro Council.

Responsibility: Metro will lead this task with participation from TPAC, JPACT and the Metro Council.

Sub-task 1.6: Federal Findings Documentation. Develop and submit Federal Findings and Air Quality Conformity Determination to FHWA and FTA for review.

Responsibility: Metro will lead this task.

Sub-task 1.7: State Findings Documentation. Develop and submit State findings to the Department of Land Conservation and Development for Post-Acknowledgement review.

Responsibility: Metro will lead this task.

Task 2: Federal Classification Review (March - June 2008)

Objective: Identify and submit Federal Functional Classification Updates⁷ and National Highway System Updates⁸ to ODOT, FHWA and FTA for review.

Responsibility: Metro will lead this task with participation from TPAC and local transportation agencies in coordination with ODOT and FHWA. JPACT and the Metro Council will forward the recommended updates to ODOT, FHWA and FTA for approval.

3.0 PUBLIC PARTICIPATION PLAN

The Overview section (Section 1) described the decision-making structure that guides transportation planning activities and decision-making in the Portland metropolitan region. This section describes the *stakeholder engagement and outreach* components that will inform development of an updated 2035 RTP plan, and support the decision-making role of the Metro Council, JPACT and MPAC and the participatory role of public agencies, targeted stakeholder groups and the general public.

Metro's targeted stakeholders and planning partners include the 25 cities, three counties and affected special districts of the region, Oregon Department of Transportation (ODOT), Oregon Department of Environmental Quality, Port of Portland, SMART, TriMet and other interested community, business and advocacy groups as well as state and federal regulatory officials and resource agencies. Metro also coordinates with the City of Vancouver, Clark County Washington, the Port of Vancouver, the Southwest Washington Regional Transportation Council (RTC), C-Tran, the Washington Department of Transportation, the Southwest Washington Air Pollution Control Authority and other Clark County

⁷ The Federal Functional Classification Review will occur after the 2035 RTP update process is completed.

⁸ The National Highway System review will occur as part of the Regional Freight Plan work program activities.

governments on bi-state issues. This broad spectrum of stakeholders is the primary focus of the public participation plan.

A second priority for community outreach is the general public. The general public will be engaged and provided opportunities to give input throughout the planning process via the Metro website, publications, electronic newsletters, telephone hotline, public opinion survey, focus groups, Metro public meetings, public hearings, media outreach, community newspapers and The Oregonian. In addition, feedback will be solicited on specific plan elements during public comment periods, public hearings and as part of formal review processes. Opportunities to partner with local governments, business and community groups and use public access television to broaden awareness of and participation by the general public in the 2035 RTP update will be identified throughout the process.

A collaborative effort will be required between the consultant team, Metro Council, JPACT, and staff to ensure that the public participation plan is an effective tool for developing and creating a constructive, meaningful, and broad-based dialogue with the citizens and decision-makers of the Portland metropolitan region.

Successful outcomes of this ambitious RTP update process depend on the active participation of local, state and regional decision makers, other transportation providers, public agency staff, and other stakeholders that include the business community, community and environmental groups, and residents of the region. Generally, the outreach component will seek to inform, educate and gain input in a targeted fashion, recognizing the limited time and financial resources available. The public participation plan relies on educational opportunities and innovative tools and forums/workshops that provide for adequate and effective, though focused public dialogue. With targeted input from stakeholders and the broader community, Metro and its regional partners will update the RTP to prioritize critical transportation investments to best support the desired economic, environmental, land use and transportation outcomes the New Look identifies and, as a result, better implement the 2040 Growth Concept vision.

The public participation plan builds responds to two key directives from Metro Council: (1) the questions for the public and stakeholders are not about the broad vision for growth and development in the Portland metropolitan region (that vision is articulated in the 2040 Growth Concept, and has been supported several times in various ways by local governments and the general public); rather, the questions are about implementation (what can we do, especially, in the context of the RTP, with transportation investments, to better achieve the 2040 Growth Concept vision); and (2) focus on elected and appointed representatives of local governments and interest groups, not on extensive outreach to the general public (though opportunities for public education, engagement and comment will be provided in a targeted manner).

COMPONENT 1: STAKEHOLDER OUTREACH AND EDUCATION (JUNE -DEC. 2006)

The first component is intended to serve a two-fold purpose of public education and engagement, using six primary methods to engage key stakeholders and the public in focused input and discussions: regional forums, opinion survey, focus groups, stakeholder workshops, media outreach, publications, interested parties' mailing list, an outreach toolkit, and project website. This component is expected to begin in partnership with the June New Look forum and will conclude with the New Look forum scheduled for December.

Regional Forums

The regional forums will provide the setting for both sharing and collecting information. During these day-long interactive forums to be held in June and December, the project team and Metro staff and leadership can introduce New Look effort to the targeted stakeholders while beginning the process of

soliciting feedback and collecting input. The project team in partnership with Metro staff and leadership will develop the specific objectives and format of these forums.

<i>Consultant Deliverables:</i>	Workshop organization, outreach and educational materials design, workshop facilitation, summary report, and outreach video design.
<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.
<i>Number of Meetings:</i>	2 planning meetings and 3 conference calls per forum.
<i>Link to RTP TAP:</i>	A June Forum marks the beginning of the effort to identify desired outcomes and policy tradeoffs to be analyzed during Phase 2, while a December Forum will mark the transition from the research and policy development phase to development of an updated RTP that implements the New Look policy direction.
<i>Links to Other Efforts:</i>	The Regional Forums are intended to directly link all New Look long-range planning efforts currently underway. The RTP (including the Regional Freight Plan), Shape of the Region, and Investing in Communities components will all be included in the forums and discussed in the context of the broader New Look effort.
<i>Timeframe:</i>	June 2006 and December 2006

Opinion Survey

The project team, working with Metro staff and leadership, will develop an opinion survey focused on soliciting a representative sample of opinion on desired outcomes for transportation, the public's willingness to pay for transportation priorities and transportation funding options. The project team and Metro staff and leadership will work in partnership to develop the goals and purpose of the survey. This opinion survey, implemented by Moore Research, Inc., will include instrument design, sample selection, administration, coding and data analysis, and reporting.

<i>Consultant Deliverables:</i>	Develop survey instrument (English and Spanish), conduct survey, survey analysis report.
<i>Metro Responsibilities:</i>	Materials production/printing, mailing costs.
<i>Number of Meetings:</i>	1-2 Conference Calls.
<i>Link to RTP TAP:</i>	The opinion survey will be used to refine the desired outcomes, public priorities for transportation and willingness to pay for those priorities.
<i>Links to Other Efforts:</i>	Questions will be formulated to solicit feedback on regional transportation issues and their relationship to the New Look effort.
<i>Timeframe:</i>	September 2006 - December 2006

Focus Groups

The purpose of the focus groups is to involve participants in a highly interactive small group setting that allows for candid discussion and feedback on project-related issues and options, including desired outcomes for transportation and transportation needs, funding options and investment priorities. Each will involve a selected group of participants reflecting a variety of social, demographic, and economic characteristics (involving 10 to 15 participants). The project team will work with Metro staff and leadership to develop the purpose, goals, and agenda for each focus group.

<i>Consultant Deliverables:</i>	Focus group design, outreach and educational materials design, focus group facilitation, summary report.
<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, mailing costs.
<i>Number of Meetings:</i>	2 planning meetings and 3-4 conference calls (combined focus group/targeted workshop meetings).
<i>Link to RTP TAP:</i>	A first round of focus groups will be conducted in September to December of 2006, serving to inform the desired outcomes and public priorities effort. After the December Regional Forum, another round of focus groups will be held from January to June of 2007 to prioritize transportation investments based on the desired outcomes, public priorities and fiscal constraints. The project team will work with Metro staff and leadership to determine the number of focus groups to be scheduled for each component.
<i>Links to Other Efforts:</i>	The focus groups will be structured to include time to solicit feedback on regional transportation issues and their relationship to the other New Look components.
<i>Timeframe:</i>	September 2006 - December 2006
<i>Number of Focus Groups:</i>	5

Stakeholder Workshops

Targeted workshops will allow the project team and Metro staff and leadership to reach groups that need more in-depth outreach efforts. These workshops will be held with specific groups and organizations with interests in transportation and its connection with a broad range of issues across the region, include a series of meetings held with traditionally underrepresented groups, in cooperation with community-based organizations (CBOs).

Groups and organizations targeted may include transportation and land use advocacy organizations (e.g., Bicycle Transportation Alliance, 1000 Friends of Oregon, Coalition for a Livable Future), immigrant and refugee advocates (e.g., Immigrant and Refugee Community Organization, Frente Commun), affordable housing advocates (e.g., Community Alliance of Tenants, Clackamas Community Land Trust), environmental organizations (e.g., Sierra Club, Natural Resources Council), business groups (e.g., chambers of commerce, the Portland Business Alliance, Westside Economic Alliance, Clackamas County Economic Alliance) The project team in cooperation with Metro staff and leadership should develop the list of partner CBOs and target groups for outreach as the process progresses.

<i>Consultant Deliverables:</i>	Workshop organization, outreach and educational materials design, facilitation, summary report.
<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.
<i>Number of Meetings:</i>	2 planning meetings and 3-4 conference calls (combined focus group/targeted workshop meetings).
<i>Link to RTP TAP:</i>	Stakeholder workshops will be held to inform the desired outcomes and public priorities tasks in Phase 2 and prioritizing transportation investments within fiscal constraints tasks in Phase 3. The number of workshops needed for each phase will be determined by the project team, in partnership with Metro staff and leadership.

Links to Other Efforts: Where ever possible partnering opportunities will be pursued to combine and consolidate the stakeholder workshops with other similar efforts being conducted by local governments and targeted groups and organizations. It is hoped that this will help to avoid “meeting fatigue” and will allow participants to better consider the broader issues facing the region.

Timeframe: September 2006 - June 2007

Number of Workshops: 5 (2 for traditionally underrepresented groups)

Web Site

The project team will create interactive project website components, including an interactive web survey element, and a budget scenario allocation exercise feature (the Budget Challenge Game).

Consultant Deliverables: Web survey element design, budget scenario allocation exercise design.

Metro Responsibilities: Hosting and maintenance of interactive elements, response collection and tabulation.

Number of Meetings: 1 Planning Meeting and 3-4 Conference Calls (combined Interactive Web Component/Web-based Outreach meetings).

Link to RTP TAP: Web-based outreach will be an ongoing feature of the public involvement effort to engage the general public and other stakeholders. The interactive survey element and budget scenario allocation game will be added during the project prioritization tasks of Phase 3. These elements are intended to assist in refining priorities and developing a Financially Constrained System of projects.

Links to Other Efforts: The RTP web component will be part of a larger web-based outreach effort that combines all of the New look long-range planning initiatives accessed through a single website. Opportunities to have local governments and other stakeholder group websites to provide links to the Metro website will be identified.

Timeframe: June 2006 – November 2007

Transportation Hotline

Metro staff will maintain a 2035 RTP Update message program with timely information that includes meeting dates and key decision points. A mailbox option for requesting information will also be established as part of this function.

Consultant Deliverables: None.

Metro Responsibilities: Hosting and maintenance of hotline, response collection and tabulation.

Link to RTP TAP: Use of the transportation hotline will be an ongoing feature of the public involvement effort to communicate key decisions points and receive comments during formal public comment periods.

Timeframe: June 2006 – March 2008

Media Outreach

Using mass media, information will be provided to inform and engage the community throughout the process. A mailing list of local media will be compiled. Media briefings will be conducted with reporters

and editorial board members as determined appropriate. Op-ed pieces will be developed. Press releases and media packets will be provided to media at key decision-making points. The media will be notified of public meetings and decisions prior to the date of the meeting/hearing.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Creation of media list, preparation, printing and distribution of materials, general media outreach.
<i>Link to RTP TAP:</i>	Media outreach will be an ongoing feature of the public involvement effort to report on the results and findings of the technical tasks.
<i>Links to Other Efforts:</i>	Public information materials and outreach will explicitly link the RTP with the Regional Freight Plan and New Look processes.
<i>Timeframe:</i>	June 2006 – November 2007

Interested Parties Mailing List and Electronic Newsletters

An interested parties' mailing list will be established of interested members of the public.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Creation/maintenance of interested parties' mailing list, electronic newsletters.
<i>Link to RTP TAP:</i>	Use of the interested parties mailing list and electronic newsletters will be an ongoing feature of the public involvement effort.
<i>Timeframe:</i>	February 2006 – March 2008

Publications

Two newsletters are planned. Fact sheets will be developed throughout the process to describe different components of the update as needed. The newsletters and fact sheets will be distributed through Metro's website, at meetings and to stakeholders upon request. Summary reports documenting the results and findings of major tasks will also be developed and made available on Metro's website and meeting presentations.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Preparation, printing and distribution of materials.
<i>Link to RTP TAP:</i>	Publications summarizing the results and findings of the TAP will be an ongoing feature of the public involvement effort.
<i>Links to Other Efforts:</i>	Public information materials and outreach will explicitly link the RTP with the Regional Freight Plan and New Look processes.
<i>Timeframe:</i>	June 2006 – March 2008

COMPONENT 2: STAKEHOLDER COORDINATION, COLLABORATION, AND OUTREACH (JUNE 2006-SEPTEMBER 2007)

The second component of the participation plan will bring agencies and jurisdictions and targeted stakeholders together to discuss the implications of the findings of the first component's outreach effort as well as to ensure effective regional and local collaboration and cooperation throughout the process. This effort will involve two main components: agency and jurisdictional outreach, and a collaboration and

cooperation effort focused on specific technical topics and interest areas. This component will be conducted along a roughly parallel timeframe with the first component.

Agency and Jurisdictional Outreach

In this component, the project team will work with cities, counties, and agencies such as Tri-Met and the Port of Portland to conduct targeted outreach and communication efforts intended to address the specific outreach and information needs of each agency or jurisdiction. In addition, the role of the project team will be to assist the agencies and jurisdictions in question so as to ensure that they are effectively collaborating with each other and the RTP process. The regular standing County Coordinating Technical Advisory Committees meetings and other means (e.g., joint MTAC/TPAC and MPAC/JPACT workshops, Regional Travel Options Subcommittee, Transport Subcommittee, Freight TAC the Bi-State Transportation Committee presentations) will be utilized to share project information and collect input throughout the process.

<i>Consultant Deliverables:</i>	Meeting organization, outreach and educational materials design, facilitation, summary report.
<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.
<i>Number of Meetings:</i>	2-4 Planning Meetings and 1-2 Conference Calls (combined Agency and Jurisdictional Outreach/ Topical Workshops).
<i>Link to RTP TAP:</i>	The agency and jurisdictional outreach process is intended to extend the reach of the RTP outreach effort by coordinating with agencies and jurisdictions responsible for implementing elements of the Regional Transportation Plan. This effort will occur during the identification of desired outcomes, public priorities and scenarios tasks in Phase 2 and prioritization of transportation investment tasks in Phase 3, with coordinating meetings split evenly between the two phases.
<i>Links to Other Efforts:</i>	Where ever possible partnering opportunities will be pursued to combine and consolidate outreach to agencies and jurisdictions with other similar efforts. It is hoped that this will help to avoid “meeting fatigue” and will allow participants to better consider the broader issues facing the region.
<i>Timeframe:</i>	June 2006 – June 2007
<i>Number of Workshops:</i>	6

Mayors’/Chairs’ Forums

The Mayors’/Chairs’ forums will provide the setting for both sharing and collecting information with the region’s elected officials as part of the broader New Look process. Three forums are budgeted in the New Look work program. Metro staff and leadership will develop the specific objectives and format of these forums.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.
<i>Link to RTP TAP:</i>	The forums are intended to extend the reach of the RTP outreach effort by coordinating directly with local elected officials responsible for implementing elements the Regional Transportation Plan. The purposes of the forum and link to technical work will be developed.

Links to Other Efforts: The Forums are intended to directly link all New Look long-range planning efforts currently underway. The RTP (including the Regional Freight Plan), Shape of the Region, and Investing in Communities components will all be included in the forums and discussed as parts of one single planning effort.

Timeframe: October 2006 and May 2007

Technical Topic Workshops

These workshops will be conducted focusing on key interest areas and technical topics such as: finance, governance, economic development, sustainability, and housing as they related to the regional transportation system. Public agency and jurisdictional staff, as well as representatives from identified community-based organizations, business groups and advocacy groups will meet to help to ensure effective region-wide cooperation and collaboration. A high priority in this effort will be to make sure that minority, low-income, or other traditionally underrepresented communities share in the benefits of transportation improvements without bearing a disproportionate burden. The project team in partnership with Metro staff and leadership will develop the format and purpose of these workshops.

Consultant Deliverables: Meeting organization, outreach and educational materials design, facilitation, summary report.

Metro Responsibilities: Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.

Number of Meetings: 3 Planning Meeting and 1-2 Conference Calls (combined Agency and Jurisdictional Outreach/Technical Topic and Interest Area meetings).

Link to RTP TAP: The topical workshops are intended to assist in the refinement of the transportation investment priorities and selection of the recommended implementation strategies.

Links to Other Efforts: Participants will be asked to consider transportation issues in relation to the broader long-range planning context. Opportunities to partner with local governments and targeted groups and organizations will be identified.

Timeframe: January 2007 – September 2007

Number of Workshops: 5

CETAS Briefings

SAFETEA-LU requires consultation of Federal and state wildlife, land management and regulatory/resource agencies during the process to ensure adequate consideration of environmental impacts at a transportation system planning level of analysis. The Collaborative Environmental and Transportation Agreement for Streamlining (CETAS) group includes state and federal resource agencies, including FHWA, National Marine Fisheries, ODOT, DLCD, ODEQ, Oregon Department of Fish and Wildlife, State Historic Preservation Office, Oregon Division of State Lands, Oregon Parks and Recreation, U.S. Army Corp of Engineers, U.S. Environmental Protection Agency and U.S. Fish and Wildlife Service. Metro staff and leadership will develop the specific objectives and format of these briefings.

Consultant Deliverables: None.

Metro Responsibilities: Materials production/printing and presentation.

<i>Link to RTP TAP:</i>	The consultation briefings are intended to extend the reach of the RTP outreach effort by coordinating directly with Federal and state wildlife, land management and regulatory/resource agencies as required by SAFETEA-LU. The purposes of the briefing and link to technical work will be developed in consultation with FHWA Division staff.
<i>Links to Other Efforts:</i>	The RTP (including the Regional Freight Plan), Shape of the Region, and Investing in Communities components will all be included in the briefings and discussed as parts of one single planning effort.
<i>Number of Briefings:</i>	2
<i>Timeframe:</i>	October 2006 and September 2007

Outreach Toolkit

In order to extend the reach of the outreach effort, local jurisdictions, agencies, and organizations will be provided with a “toolkit” of outreach and educational materials. This outreach kit will consist of a variety of educational materials and information designed for distribution to the public by Metro in partnership with agencies, jurisdictions, and organizations.

<i>Consultant Deliverables:</i>	Outreach toolkit design.
<i>Metro Responsibilities:</i>	Materials production/printing, toolkit distribution, mailing costs.
<i>Number of Meetings:</i>	1-2 Conference Calls.
<i>Link to RTP TAP:</i>	The outreach toolkit will be developed to assist in the identification of desired outcomes and public priorities, with potential supplemental materials to be determined later to assist in the transportation investment prioritization tasks in Phase 3.
<i>Links to Other Efforts:</i>	The outreach toolkit will be created in such a way that it clearly links the RTP process with the New Look regional long-range planning effort.
<i>Timeframe:</i>	Development and distribution from June 2006 – September 2006, with supplemental materials development and distribution to occur after the December Forum to coincide with the project prioritization tasks in Phase 3.

COMPONENT 3: ADOPTION PROCESS (SEPT. – NOV. 2007)

The third component will coincide with the release of the draft RTP, and will focus on soliciting input. A final Regional Forum, public hearings, web-based outreach, transportation hotline and other means will be used to provide information to key stakeholders and the general public. This component will begin upon release of a discussion draft 2035 RTP document. It is expected that this effort will begin in September 2007 and continue into November 2007.

Regional Forum

A Regional Transportation Forum will be conducted with the goal of introducing the findings and recommendations of the RTP and soliciting public feedback. The forum will be similar to the regional forums described in component one, with a focus on the discussion draft RTP and will include informational booths and presentations as well as a variety of methods for collecting feedback.

<i>Consultant Deliverables:</i>	Meeting organization, outreach and educational materials design, facilitation, summary report.
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<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, speaker stipends, mailing costs.
<i>Number of Meetings:</i>	1 Planning Meeting and 1-2 Conference Calls.
<i>Link to RTP TAP:</i>	This forum will be conducted with the goal of introducing the findings and recommendations of the RTP and soliciting public feedback
<i>Links to Other Efforts:</i>	The forum will be structured so as to show the relationships between the RTP and Metro's other planning efforts.
<i>Timeframe:</i>	September 2007
<i>Number of Forums:</i>	1

Metro Council Public Hearings

Public hearings will be conducted throughout the region with the goal of introducing the findings and recommendations of the RTP and soliciting public feedback. These hearings will be hosted by the Metro Council as part of regular meetings, and may include informational booths.

<i>Metro Responsibilities:</i>	Materials production/printing, facility rental, food and beverage service, participant recruitment, mailing costs.
<i>Link to RTP TAP:</i>	The hearings will be conducted with the goal of introducing the findings and recommendations of the RTP and soliciting public feedback
<i>Links to Other Efforts:</i>	Where possible, public hearings will be combined with events of the other planning efforts.
<i>Timeframe:</i>	September – November 2007
<i>Number of Hearings:</i>	4

Web-Based Outreach

The project website will be configured to allow the public to submit comments on the draft RTP. The web page will also include a description of the update process, a timeline with key decision points, fact sheets, newsletters and other pertinent information about the process. Additionally, the Budget Challenge Game will be completed and ready for public use.

<i>Consultant Deliverables:</i>	Summary report and the Budget Challenge Game.
<i>Metro Responsibilities:</i>	Hosting and maintenance of interactive elements, response collection and tabulation.
<i>Number of Meetings:</i>	1 Planning Meeting and 3-4 Conference Calls (combined Interactive Web Component/Web-based Outreach meetings).
<i>Link to RTP TAP:</i>	Web-based outreach will be integrated into the public review phase of the discussion draft RTP.
<i>Links to Other Efforts:</i>	The RTP web component will be part of a larger web-based outreach effort that combines all four long-range planning initiatives accessed through a single website. Opportunities to have local governments and other stakeholder group websites to provide links to the Metro website will be identified.
<i>Timeframe:</i>	Ongoing

Transportation Hotline

Metro staff will maintain a 2035 RTP Update message program with timely information that includes meeting dates and key decision points. A mailbox option for leaving comments and requesting information will also be established as part of this function.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Hosting and maintenance of hotline, response collection and tabulation.
<i>Link to RTP TAP:</i>	Use of the transportation hotline will be integrated into the public review phase of the discussion draft RTP.
<i>Timeframe:</i>	September – November 2007

Media Outreach

Using mass media and public outreach techniques, information will be provided to inform and engage the community about the release of the draft RTP, and solicit feedback. Media briefings will be conducted with reporters and editorial board members as determined appropriate. Press releases and media packets will be developed and provided to media at key decision-making points. The media will be notified of public meetings and decisions prior to the date of the meeting/hearing.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Preparation, printing and distribution of materials, general media outreach.
<i>Number of Meetings:</i>	1-2 conference calls (if needed).
<i>Link to RTP TAP:</i>	Media outreach will be integrated into the public review phase of the discussion draft RTP.
<i>Links to Other Efforts:</i>	Public information materials and outreach will explicitly link the RTP with the New Look.
<i>Timeframe:</i>	September 2007 – November 2007

Public Comment Report

A public comment report will be compiled and summarized at the end of the formal public comment period.

<i>Consultant Deliverables:</i>	None.
<i>Metro Responsibilities:</i>	Public Comment Report and printing and distribution of materials.
<i>Link to RTP TAP:</i>	The public comment summary report will be integrated into the public review phase of the discussion draft RTP and will be used to identify refinements to the discussion draft RTP prior to adoption.
<i>Timeframe:</i>	September 2007 – November 2007

Final Public Outreach Summary Report

A final summary report containing a complete evaluation and overview of the outreach effort, including a discussion of the successes and potential areas for improvement will be created.

<i>Consultant Deliverables:</i>	Final Summary Report.
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<i>Metro Responsibilities:</i>	Printing and distribution of materials.
<i>Number of Meetings:</i>	1-2 conference calls (if needed).
<i>Link to RTP TAP:</i>	The final public outreach summary report is intended to be included in the final RTP report.
<i>Links to Other Efforts:</i>	The RTP summary report will include a section that outlines how the outreach effort for the RTP was linked with New Look efforts, as well as an evaluation of how well this was accomplished.
<i>Timeframe:</i>	February 2008

APPENDIX A: ADDITIONAL CONTEXT FOR THE 2035 RTP UPDATE

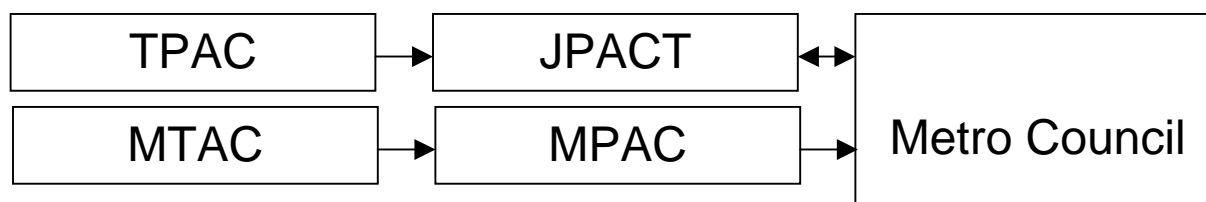
REGIONAL CONSULTATION, COORDINATION AND DECISION-MAKING STRUCTURE

Metro's transportation planning activities are guided by a decision-making framework that consults and coordinates the perspectives of federal, state, regional and local government agencies, citizens and interest groups as part of the decision-making process.

Metro facilitates this consultation and coordination through four advisory committee bodies –the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC). In addition, the Metro Committee for Citizen Involvement (MCCI) provides advice to the Metro Council on how to best involve residents in regional planning activities. **Figure 1** displays the regional transportation decision-making process.

Figure 1.

Regional Transportation Decision-Making Process



Source: Metro

Roles and Responsibilities

A more detailed description of make-up and the roles and responsibilities of each decision-making body are provided below.

Metro Council. The Council President is directly elected region-wide and the six other members of the Metro Council are directly elected from districts throughout the region. The Council approves Metro policies, including transportation plans recommended by JPACT. The Metro Council, in making policy decisions and approving transportation plans, relies on JPACT and the Metro Policy Advisory Committee (MPAC) for input. JPACT and MPAC, in turn, rely on technical expertise and input from TPAC and the Metro Technical Advisory Committee (MTAC).

JPACT. The Joint Policy Advisory Committee on Transportation (JPACT) provides a forum for elected officials and representatives of agencies involved in transportation planning to evaluate transportation policies and make recommendations on projects to implement those policies. This 17-member committee makes funding recommendations to the Metro Council. The committee includes elected officials from local governments within the region, three Metro councilors, representatives from ODOT, TriMet, the Port of Portland, plus representatives from governments and agencies of Clark County, Wash., and the state of Washington. The JPACT finance subcommittee also meets to develop and recommend financing strategies to implement the region's transportation policies.

- **Bi-State Transportation Committee**

The Bi-State Coordination Committee is a subcommittee of Metro's Joint Regional Policy Advisory Committee on Transportation (JPACT) and Southwest Washington Regional Transportation Council (RTC). The role of the committee is to review transportation and land-use issues of bi-state significance and to present recommended actions to JPACT and RTC. The committee is comprised of six members from Clark County and seven members from the Portland metro area. The Bi-State Coordination Committee was chartered through resolutions approved by Metro, Multnomah County, the cities of Portland and Gresham, TriMet, ODOT, the Port of Portland, the Southwest Washington Regional Transportation Council (RTC), Clark County, C-Tran, Washington State Department of Transportation (WSDOT) and the Port of Vancouver.

MPAC – Metro Policy Advisory Committee (MPAC) is a 28-member committee that was established by Metro Charter to provide a vehicle for local government involvement in Metro's growth management planning activities. It includes eleven locally-elected officials, three appointed officials representing special districts, TriMet, a representative of school districts, three citizens, two Metro Councilors (with non-voting status), two officials from Clark County, Washington and an appointed official from the State of Oregon (with non-voting status). Under Metro Charter, this committee has responsibility for recommending to the Metro Council adoption of, or amendment to, any element of the Charter-required Regional Framework Plan. In accordance with this requirement, the transportation plan developed to meet SAFETEA-LU, the Oregon Transportation Planning Rule and Metro Charter requirements will be developed with input from both MPAC and JPACT. This ensures proper integration of transportation with land use and environmental concerns.

TPAC. The Transportation Policy Alternatives Committee (TPAC) provides technical input into the planning process and makes recommendations to JPACT. TPAC membership includes senior technical staff from cities and counties in the region, ODOT, TriMet, the Port of Portland, the Washington Department of Transportation, Federal Highway Administration, Oregon Department of Environmental Quality and the Southwest Washington Regional Transportation Council. There are also six citizen representatives with strong public involvement skills and diverse backgrounds appointed to TPAC by the Metro Council. The citizen members represent business, freight, and alternative mode interests from different parts of the region.

- **Regional Travel Options (RTO) subcommittee.** The Regional Travel Options (RTO) subcommittee makes recommendations to the Transportation Policy Alternatives Committee (TPAC) related to a program to provide alternatives to driving alone in the region. The subcommittee has a total of three citizen representatives who join technical staff from jurisdictions around the region, including Metro, ODOT, TriMet, Washington County, Multnomah County, Clackamas County, City of Portland, Oregon Department of Energy, DEQ, Port of Portland and Wilsonville's South Metro Area Rapid Transit (SMART) agency and the Clark County Strategic Planning group (C-TRAN, WASHDOT or SWRTC).
- **Transport subcommittee.** The TransPort Subcommittee to TPAC guides and coordinates the region's intelligent transportation activities, including policy and operations as recommended by SAFETEA-LU. The committee is a multi-agency group of transportation system providers representing the same agencies as TPAC. In early 2005, the role of this group as a Subcommittee of TPAC was formalized.

MTAC – The Metro Technical Advisory Committee (MTAC) provides technical support into the regional planning process and makes recommendations to MPAC. The 37-member committee is composed of three citizen members, planning directors and other senior-level staff from cities and counties around the region including Clark county and Vancouver, Washington, ODOT, TriMet, the Department of Land Conservation and Development, Port of Portland, business, commercial and industrial representatives, service providers, community and environmental organizations.

MCCI –The Metro Committee for Citizen Involvement (MCCI) was established under Metro’s home-rule charter in 1992 to assist with the development, implementation and evaluation of Metro’s citizen involvement program and advise on how to best involve residents in regional planning activities. The committee has 20 positions: two in each of the six council districts; one representative from each of the county citizen involvement organizations; one representative from each county area outside Metro’s boundary; and two at-large positions. According to its bylaws, MCCI includes members from the entire area within the boundaries of Clackamas, Multnomah and Washington counties.

Regional Freight and Goods Movement Task Force – The Regional Freight and Goods Movement Task Force will be comprised of 33 members from the community, private and public sectors, representing the many elements of the multimodal freight transportation system and community perspectives on freight. Recommendations from the Regional Freight TAC will be forwarded to the Regional Freight and Goods Movement Plan Task Force. The Task Force will make its recommendations to TPAC, JPACT and the Metro Council. The recommendations will be forwarded to the 2035 Regional Transportation Plan process for adoption into the region’s long-range transportation system plan.

Freight Technical Advisory Committee – The Freight Technical Advisory Committee (TAC) will be comprised of public sector staff from the local, regional, and state agencies operating within Metro’s jurisdictional boundaries. The TAC will provide input and review of technical work products developed as part of the *Regional Freight and Goods Movement Plan*.

REGULATORY CONTEXT FOR 2035 RTP UPDATE

The 2035 RTP Update is the first significant update to the Portland region’s RTP since the 2000 RTP.⁹ The 2000 RTP was the culmination of a five-year effort to overhaul the previous plan to reflect new federal and state regulations and to implement the then newly adopted 2040 Growth Concept. It was the first RTP to be acknowledged by the LCDC as consistent with statewide planning goals. This planning effort will be conducted within the context of guiding federal, state, and regional transportation and land use policy and requirements.

Federal Context

Metropolitan areas with populations over 50,000 people are required by federal law to have a Metropolitan Planning Organization (MPO), and those organizations are required to prepare regional transportation plans that describe, among other things, how federal and state funds for transportation projects and programs will be spent. An MPO must create an RTP that identifies the transportation investments it will make with those funds over a 20-year planning period. Plans are required to be updated at least every four years.

Federal rules also require the RTP to be *financially constrained*, that is, the estimated costs of the identified projects do not exceed an estimate of revenues that are “reasonably anticipated to be available” for the 20-year plan period. A transportation project is eligible for federal transportation funds distributed through Metro if it is included in the financially constrained system and is consistent with federal air quality standards.

At the federal level, Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) is the most recent federal transportation legislation that establishes a comprehensive framework for making transportation investment decisions in metropolitan areas. Among other

⁹ There were minor updates in 2002 and 2003-04, designed to keep the RTP in compliance with state regulations and federal changes to transportation laws.

provisions, it directs Metro to expand consultation and coordination with planning officials, resource agencies and users of the system, develop a formal public participation plan that provides reasonable opportunities for interested parties to comment on development of the RTP and address eight planning factors focused on:

- Improving transportation safety
- Enhancing security
- Preserving the existing transportation system
- Supporting economic vitality
- Connecting people, freight, and modes
- Increasing system management and operations
- Minimizing environmental impacts
- Increasing mobility and accessibility

State Context

In 1991, the Land Conservation and Development Commission adopted the Oregon Transportation Planning Rule (TPR). The TPR implements State Land Use Planning Goal 12, Transportation, which was adopted by the Oregon Legislature in 1974. The TPR is the road map for the preparation of transportation system plans (TSP) by all jurisdictions responsible for transportation planning in the state of Oregon.

TSPs prepared at the state, regional and local are required to plan for all modes of transportation. The TPR requires most cities and counties and the state's five MPOs to adopt transportation system plans that consider all modes of transportation, energy conservation and avoid principal reliance on any one mode to meet transportation needs. By state law, local plans in MPO areas must be consistent with the regional transportation system plan (TSP). In the Portland region, the Regional Transportation Plan serves as the regional TSP. Likewise, the regional TSP must be consistent with the Oregon Transportation Plan, adopted in 1992 by the Oregon Transportation Commission.

The state TPR requires that transportation system plans provide an adequate system of improvements that meet adopted performance measures. Goal 12 lists implementing directives including consideration of all modes of transportation; identification of needs; avoidance of single mode reliance; minimization of adverse impacts; energy conservation; meeting needs of transportation disadvantage; strengthening the economy by facilitating the flow of goods and services; and conformity with land use plans. The TPR also establishes mandates for linking transportation planning with land use.

Regional Context

In 1979, the voters in this region created Metro, the only directly elected regional government in the nation. In 1991, Metro adopted Regional Urban Growth Goals and Objectives (RUGGOs) in response to state planning requirements. Revised in 1995 and acknowledged by the Land Conservation Development Commission in 1996, the RUGGOs establish a process for coordinating planning in the metropolitan region in an effort to preserve regional livability. In 1995, RUGGOs, including the 2040 Growth Concept, were incorporated into the Regional Framework Plan in 1997 to provide the policy framework for guiding Metro's regional planning program, including development of functional plans and management of the region's urban growth boundary. The RTP is a Metro functional plan.

Metro Charter

In 1992, the voters of the Portland metropolitan area approved a home-rule charter for Metro. The charter identifies specific responsibilities of Metro and gives the agency broad powers to regulate land-use planning throughout the three-county region and to address what the charter identifies as “issues of regional concern.” Among these responsibilities, the charter directs Metro to provide transportation and land-use planning services, oversee regional garbage disposal, and recycling and waste reduction programs, develop and operate a regional parks system and operate regional spectator facilities such as the Oregon Zoo, the Oregon Convention Center and the Portland Metropolitan Exposition (Expo) Center. The charter also directed Metro to develop the 1997 Regional Framework Plan that integrates land-use, transportation and other regional planning mandates. The 2040 Growth Concept and implementing functional plan were incorporated into the charter-required regional framework plan.

Regional Framework Plan

The Regional Framework Plan is a comprehensive set of policies that integrate land-use, transportation, water, parks and open spaces and other important regional issues consistent with the 2040 Growth Concept. The Framework Plan is the regional policy basis for Metro’s planning to accommodate future population and employment growth and achieve the 2040 Growth Concept.

2040 Growth Concept

The 2040 Growth Concept was adopted in 1995, and serves as the blueprint for future growth in the region. The Growth Concept text and map identify the desired outcome for the compact urban form to be achieved in 2040. The 2040 Growth Concept has been acknowledged to comply with statewide land use goals by the Land Conservation and Development Commission (LCDC). It is the foundation of Metro’s 1997 Regional Framework Plan. Adoption of the 2040 Growth Concept established a new direction for planning in the Portland metropolitan region by linking urban form to transportation. This new direction reflects a regional commitment to developing a plan that is based on efficient use of land and a safe, cost-effective and efficient transportation system that supports the land uses in the 2040 Growth Concept and serves all forms of travel.

The unifying theme of the 2040 Growth Concept is to preserve the region’s livability while planning for expected growth in this region – a principle that calls for a regional transportation system designed to meet the specific needs of each 2040 Growth Concept land use component. The Regional Transportation Plan seeks to protect the region’s livability by defining a transportation system that:

- anticipates the region’s current and future travel needs for safe and efficient people and goods movement
- accommodates an appropriate mix of all forms of travel
- supports key elements of the 2040 Growth Concept through strategic investments in the region’s transportation system

A New Look at Regional Choices

Since the adoption of the long-range plan in 1995, the region’s population has increased by 200,000 residents. More people, especially young adults, are moving to the region because it is a great place to live, work and play. This rapid growth brings jobs and opportunity, but it also creates new challenges. New forecasts show that within the next 25 years, about a million more people will live in the five-county

Portland metropolitan region. Time has exposed some of the shortcomings in the implementation of the region's long-range plan, as well as tensions and trade-offs between different objectives.

In 2005, the Metro Council initiated a project called the New Look at Regional Choices (the New Look) is a regional process to update Metro's long-range strategies and policies for managing growth. The process will focus primarily on updating the region's implementation tools to best support the region's vision for urban form, the economy, transportation, and the environment. At the end of 2006, the Metro Council will adopt updated policies and implementation strategies, which may include proposals for the 2007 Oregon Legislature and policy direction on transportation investment priorities to be integrated into the 2035 RTP. The RTP Update is simultaneously the transportation element of the New Look. Metro wants the region's land use and transportation policies work together to enhance the region's economic strength and livability.

KEY ISSUES TO BE ADDRESSED

The region has aggressively implemented state policy calling for reduced reliance on any single mode of transportation. In practice, this has meant complementing the region's roads and highways with a comprehensive public transit network; taking seriously the needs of pedestrians and bicyclists in addition to cars; and integrating land use and transportation planning by promoting compact urban form and mixed-use development. Providing for our future transportation needs will be made more difficult by several key challenges, all of which have important implications for the region's ability to achieve its economic and community goals.

Growth: As the region expands to accommodate the one million new residents that are expected to be living here by 2030, major new transportation investments will be required to serve both developed and developing areas.

Congestion: A 2005 study found that the region's excellent rail, marine, highway, and air connections to national and international destinations position it as both a hub for the distribution of goods across the country and a gateway for global trade. These connections make the region's economy highly dependent on transportation. However, projected growth in freight and general traffic cannot be accommodated on the current system. Increasing congestion — even with currently planned investments — will harm the region's ability to maintain and grow business.

Funding: State and local funding for roads and transit is failing to keep pace with current needs, to say nothing of the growth expected in the coming decades. Funding has been identified for less than half the \$10 billion cost of the projects in the current Regional Transportation Plan. Furthermore, these capital expenditures compete against critical needs for operations and maintenance of the existing transportation system.

Issues to resolve

- How should the region prioritize needed transportation projects given current funding constraints? How can the region respond to rapid population growth if funding remains static?
- What is the appropriate balance between large projects that serve freight and economic development and other projects that support transportation choices and vibrant centers and neighborhoods?
- Where will the funding come from for the significant infrastructure investments needed to serve new urban areas brought inside the urban growth boundary?

- How can the region ensure that major highway projects solve existing problems rather than inducing demand from outside the region and creating new problems?
- How can we fund multi-modal projects that are critical for community livability but not eligible for highway fund dollars?
- How can the region reconcile the fragmented ownership of its transportation facilities with the need for coordinated governance of the system?
- How can the region best monitor whether its transportation system is successful in meeting regional goals and policies?

FRAMEWORK FOR UPDATING THE RTP

Though there are many requirements (federal and state) and planning standards that affect the content of an RTP, it is fundamentally about making good choices about transportation investments that support our land use, economic and environmental goals in the face of competition for limited funds. The process leading to an adopted RTP, and the transportation investments it authorizes, must incorporate public opinion and technical information in a public discussion of:

- What the region wants from its transportation system (outcomes).
- What projects and programs are most likely to produce those outcomes efficiently and fairly.
- What obstacles (especially financial ones) are there to implementing those projects and programs.
- What projects, programs and strategies should be pursued.

In sum, the RTP planning effort should provide good information (accurate, relevant, and understandable) about project and program performance (benefits and costs) in an open process that facilitates decisions about transportation investments that best advance the 2040 Growth Concept and are efficient and equitably serve the public.

New directions and emphasis

To this end, two elements of the planning process are to be given particular attention in the 2035 RTP Update:

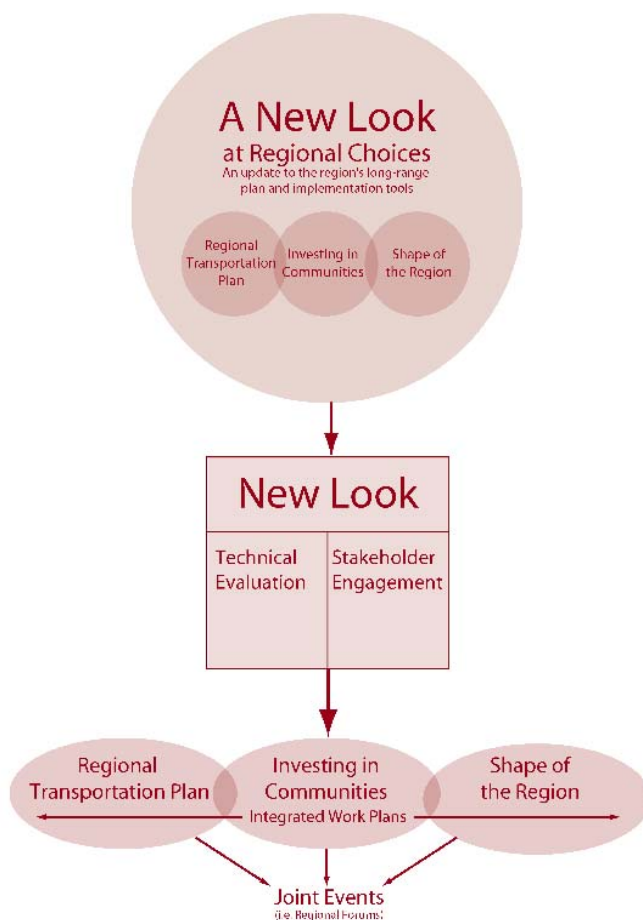
- **Integration and coordination with other regional planning processes.** The process for plan development and review must coordinate with other planning process to achieve common regional goals and outcomes. There are important links between transportation improvements and strategic investments that forward goals for land use and the region's economy while also supporting goals for protecting the environment. Consultation with a broader spectrum of interests will also be integrated into the process as the RTP update is integrated within the broader New Look planning process.
- **Focus on good information about desired outcomes, actions to achieve them, and the ability to afford those actions given realistic financial expectations.** The values and desired outcomes of the public are very important, and the decision-making process will focus on those values and outcomes to develop a priority list of transportation investments that is calibrated with realistic financial expectations for funding priority transportation services and programs to maximize benefits across the region.

Integration and coordination

The Portland region is held as a model around the country for coordinated regional planning on transportation and land use. The RTP process and resulting planning must be integrated both internally and externally. Internally, the planning must coordinate the *technical analysis and policy development* with the *public-participation process*. *Internal integration* means that the RTP process is designed so that the technical information is available for the public process and decision-makers when it is needed, and the public process does not consider policy issues before the appropriate technical information can be made available. *External integration* means that the RTP process is coordinated with other planning efforts in the region. Metro is concurrently updating the region's long-range growth management plan, supporting transportation plan, and implementation tools in its *New Look* planning effort. **Figure 2** illustrates how the RTP update fits in the New Look planning process.

Figure 2.

A New Look at Regional Choices Planning Process



Source: MIG

The circle at the top of **Figure 2** shows the *New Look* as the comprehensive evaluation of development issues in the Portland region. The *New Look* has three main components, each with many technical elements:

- *Investing in Communities* focuses on growth and development *inside* the current urban growth boundary (UGB).
- *Shape of the Region* focuses on growth and development at the urban fringe, primarily *outside* the current UGB.
- *A New Look at Transportation* (which is simultaneously the required federal process for creating an RTP) supports (and also influences) the vision for growth and development that emerges from the previous two components.

The RTP update will focus on all types of transportation projects and programs—including highways, streets, boulevards, transit, walking, biking, freight, system management and operations and demand

management. By working within the umbrella of the New Look, the process will take into consideration how those transportation investments affect land use, the economy and environmental quality.

Focus on outcomes

The current 2004 RTP includes nearly 1,000 multi-modal projects estimated to cost more than \$10 billion, but the region anticipates receiving less than \$5 billion in revenue over 20 years. Furthermore, these are capital costs that compete for the same sources used by state, regional, and local governments for operations and maintenance. This funding shortfall creates problems not only for providing needed transportation infrastructure investments, but also for the achieving the desired land-use patterns envisioned in the 2040 Growth Concept.

That gap between the cost of desired transportation improvements and the ability to pay for them is a central concern of the 2035 RTP Update. *To address the funding challenges Metro wants to modify the traditional process the region uses to evaluate and prioritize transportation improvements. Metro also wants the process to define the critical transportation issues facing the region and choices for prioritizing needed transportation improvements in the context of the New Look.*

A goal of this planning effort is a more streamlined plan and a list of transportation priorities that:

- support the Region 2040 Growth Concept and the New Look policy direction, and
- collectively do not cost more than realistic estimates of revenues. The process should engage citizens and their elected and appointed representatives to elicit their opinions about what transportation improvements are most important to them to inform prioritizing transportation investments.

Metro originally asked the consultant team to design a process based on an approach called “Budgeting for Outcomes.” The approach builds from three premises: (1) there are specific outcomes the public desires; (2) there is a price the public is willing to pay for government services that has remained relatively constant over time; and (3) establishing budget priorities within that willingness to pay should be based on public input.

Because the “Budgeting for Outcomes” approach is designed for a single jurisdiction to make budget priority decisions for an individual jurisdiction, Metro and the consultant team are adopting its principles but adapting its procedures to fit within the complex transportation funding and multi-jurisdictional environment that exists in the Portland metropolitan region. The clear desire is to move away from a plan that is a compilation of locally desired projects with an unfunded cost, to one that focuses on delivering specific results (e.g., outcomes) that citizens value (e.g., priorities) at a price they are willing to pay. The 2035 RTP Update process will enable citizens and decision-makers to work together to identify the highest priority transportation projects and programs—ones that provide a relatively high amount of net benefits for the entire region.

Better information about what transportation improvements people want and are willing to pay for is essential to the creation of an RTP that provides efficient transportation improvements and is financially constrained. What people are willing to pay (in their various roles as transportation users and federal, state, and local taxpayers) theoretically establishes the financial constraint. Given that context, an RTP (like any plan for public investment) should try to:

- *Identify what matters to citizens.* This requires identifying the public’s desired outcomes and transportation priorities in the context of limited transportation funding.

- *Measure what matters.* This requires the development of outcomes-based performance measures that should include qualitative assessments of impacts (e.g., public opinion) as well as quantitative ones (e.g., the outputs of travel-demand models or environmental justice analysis) while being careful not to double-count either as a benefit or a cost.
- *Identify choices to be made through public policies and/or investments.* Though the choices are ultimately political ones (made by a small group of decision-makers elected or appointed to represent a larger public), the hope is that the choices made roughly conform to a ranking of projects based on net benefits (cost-effectiveness), subject to constraints imposed by goals for the distribution of net benefits (fairness, equity).

This logic has been fundamental to proponents of effective decision-making and public policy for a century and will serve as the foundation for the 2035 RTP update. The RTP update technical evaluation will fit into and inform a larger process of public decision-making. A public decision-making process that is informed by good information (understandable and accurate, with assumptions and variability clearly documented) will result in better and more informed decisions.

APPENDIX B: TIMELINE, MAJOR TASKS AND OUTREACH STRATEGIES

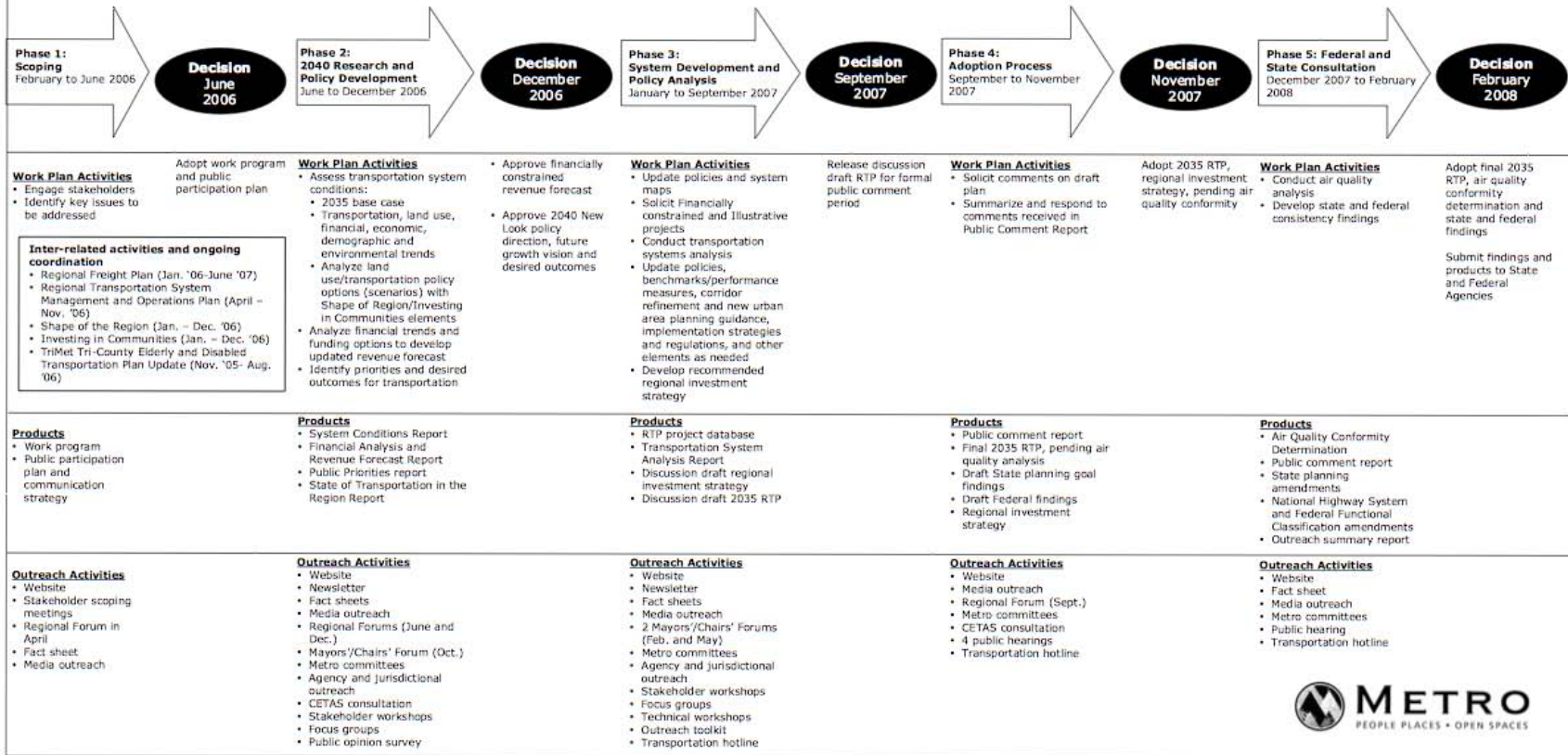
2006		
	WORK PLAN ACTIVITY	OUTREACH AND PARTICIPATION
Feb–June	<ul style="list-style-type: none"> ▶ Stakeholder scoping ▶ Identify key issues to address ▶ Establish project website and interested parties' list ▶ Develop and finalize work program and PPP 	<ul style="list-style-type: none"> • Regional Transportation Forum (April 20) • Review of work plan and PPP—MCCI/Council/JPACT/MPAC/MTAC/ TPAC • Information on Metro website
June–Sept	<ul style="list-style-type: none"> ▶ Define a framework that allows desired outcomes to be measured and to be useful in evaluating transportation system ▶ Research transportation system conditions (transportation, economic, financial, demographic and environmental trends) ▶ Analyze financial trends, evaluate funding options and draft 20-year revenue forecast ▶ Define and evaluate “scenarios” that distinguish land use and transportation policy choice ▶ Identify desired outcomes and performance measures 	<ul style="list-style-type: none"> • Regional forum (June) • Council/JPACT/MPAC/MTAC/TPAC discussions • One Focus group • Three stakeholder workshops • Three jurisdiction/agency workshops • Fact sheets • Outreach toolkit prepared • Media outreach (op-ed pieces, newspaper articles) • Metro website • Metro transportation hotline
Oct-Dec	<ul style="list-style-type: none"> ▶ Comprehensive transportation system assessment ▶ Develop State of Transportation in the Region report ▶ Adopt revenue forecast and New Look policy direction for RTP 	<ul style="list-style-type: none"> • One Mayors’/Chairs’ forum (Fall) • Regional transportation forum (Dec) • Council/JPACT/MPAC/MTAC/TPAC discussions • One focus group • Public opinion survey • Newsletter • Media outreach (op-ed pieces, newspaper articles) • Metro website • Metro transportation hotline
2007		
	WORK PLAN ACTIVITY	OUTREACH AND PARTICIPATION
JAN–JUNE	<ul style="list-style-type: none"> ▶ Update policies and system maps ▶ Solicit RTP projects ▶ Create RTP project database ▶ Conduct transportation system analysis ▶ Refine policies and update implementation strategies and regulations 	<ul style="list-style-type: none"> • Council/JPACT/MPAC/MTAC/TPAC discussions • Three focus groups • Two stakeholder workshops • Three jurisdiction/agency workshops • Fact sheets • Topical workshops • Metro website • Metro transportation hotline

2007 (CONT)	WORK PLAN ACTIVITY	OUTREACH AND PARTICIPATION
SEPT–NOV	<ul style="list-style-type: none"> ▶ Release discussion draft RTP for public review ▶ Respond to public comments ▶ Refine draft RTP based on comments ▶ Adopt 2035 RTP, pending air quality conformity analysis 	<ul style="list-style-type: none"> • Formal 45-day public comment period • Regional Transportation Forum (Sept) • Council/JPACT/MPAC/MTAC/TPAC discussions • Metro hotline • Public hearings • Public comment summary report • Public information (notices, op-ed pieces, newspaper articles) • Information on Metro website
DEC–JAN 2008	<ul style="list-style-type: none"> ▶ Air quality consultation on methodology and assumptions ▶ Conduct air quality analysis 	<ul style="list-style-type: none"> • Air quality consultation • Metro website
2008		
	WORK PLAN ACTIVITY	OUTREACH AND PARTICIPATION
JAN–FEB	<ul style="list-style-type: none"> ▶ Develop state and federal consistency findings ▶ Respond to public comments on air quality conformity ▶ Refine draft RTP based on comments 	<ul style="list-style-type: none"> • Formal 30-day public comment period on air-quality conformity analysis • Continue air-quality consultation • Metro hotline • Metro website • Public hearing • Fact sheet • Information on Metro website
FEB-MARCH	<ul style="list-style-type: none"> ▶ Final adoption of 2035 RTP, Air Quality Conformity and findings ▶ Submit final 2035 RTP, conformity determination, and federal findings to FHWA/FTA for review and Federal certification ▶ Submit final 2035 RTP and findings to State for post-acknowledgement review 	<ul style="list-style-type: none"> • Public notices • Outreach evaluation report

Updated May 30, 2006

2035 Regional Transportation Plan A New Look at Transportation

Updating the metro region's long-range transportation plan



STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 06-3661, FOR THE PURPOSE OF APPROVING A WORK PROGRAM FOR THE 2035 REGIONAL TRANSPORTATION PLAN UPDATE AND AUTHORIZING THE CHIEF OPERATING OFFICER TO AMEND CONTRACT NO. 926975

Date: May 31, 2006

Prepared by: Kim Ellis

SUMMARY

Metro is the regional government responsible for regional land use and transportation planning under state law and the federally designated metropolitan planning organization (MPO) for the Portland metropolitan area. As the MPO, Metro is charged with developing the Regional Transportation Plan (RTP) that defines regional transportation policies that will guide transportation system investments in the Portland metropolitan region needed to achieve the 2040 Growth Concept. The RTP must be updated at least every 4 years, and be consistent with guiding federal, state, and regional transportation and land use policy and requirements. The RTP also serves as the threshold for all federal transportation funding in the Portland metropolitan region and describes how federal and state funds for transportation projects and programs will be spent in the region. An MPO must create an RTP that identifies the transportation investments it will make with those funds for at least a 20-year planning period, consistent with federal and state air quality requirements. As the federally designated Metropolitan Planning Organization (MPO), Metro coordinates the distribution of these funds through the RTP and Metropolitan Transportation Improvement Program (MTIP).

The Metro Council initiated the 2035 RTP Update on September 22, 2005 with approval of Resolution #05-3610A (for the Purpose of Issuing a Request for Proposals to Develop a Work Scope for an Expanded 2005-08 Regional Transportation Plan Update that Incorporates the "Budgeting for Outcomes" Approach to Establishing Regional Transportation Priorities). The 2035 RTP update represents the first significant update to the plan in six years. The update is anticipated to be complete by November 2007 to allow adequate time to complete air quality conformity analysis and federal consultation before the current plan expires on March 8, 2008.

This is the first major update to the RTP since 2000, which was the first truly multi-modal plan to fully embrace the policies and vision for 2040 Growth Concept. The region is experiencing unprecedented growth and increasing competition for limited funds. The current plan includes projects that would cost more than twice the anticipated funding. This update will involve a new approach to address these issues and guiding federal, state and regional transportation and land use policy and requirements. The new approach (1) includes a strong education component to increase community and stakeholder awareness of the issues, (2) uses an outcomes-based approach to assess 2040 implementation and to evaluate and prioritize the most critical transportation investments, (3) emphasizes collaboration with regional partners and key stakeholders to resolve the complex issues inherent in realizing the region's 2040 Growth Concept, and (4) integrates land use, economic, environmental and transportation objectives that are part of the broader New Look planning effort.

The process will also build on new information learned from the Cost of Congestion Study and New Look public opinion research. The process will also address new federal, state and regional planning requirements, including SAFETEA-LU legislation, recent Transportation Planning Rule amendments and new policy direction from the New Look planning process.

This resolution approves the 2035 RTP Update work program and authorizes the Chief Operating Officer to amend Metro Contract No. 926975, Amendment #2, for additional time, budget and scope for consulting services identified in Exhibit A, for the period from February 17, 2006 to June 30, 2007, not-to-exceed \$410,000.

BACKGROUND

2035 RTP Update Scoping Phase

The first phase of the update included a formal scoping period to develop a detailed work plan to guide the update process. In February, Metro selected the ECONorthwest team¹ to assist with this effort. In March, Metro staff and the consultant team facilitated a series of focused policy-level discussions with the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) to kick-off the scoping phase to begin building agreement on the overall approach for the RTP update prior to engaging other key stakeholders in the process.

In April and May, the discussions were expanded to include the Metro Policy Advisory Committee (MPAC), Metro Technical Advisory Committee (MTAC), Transportation Policy Advisory Committee (TPAC), the Regional Travel Options (RTO) Subcommittee of TPAC and the Bi-State Transportation Committee. In addition, on April 20, Metro Councilors, JPACT and other key stakeholders from the Portland metropolitan region attended a Regional Transportation Forum, building on the March policy discussions. Participants included elected officials, city and county staff, members of the Metro Committee for Citizen Involvement (MCCI) and representatives from the business, environmental, and transportation communities.

Key Issues for the Work Program

Three key issues emerged during the scoping phase discussions as most critical for the RTP update work program.

- **Issue 1:** The work program needs to have a strong educational component throughout the process to increase community and stakeholder awareness of the issues facing the region. Stakeholders have stressed the importance of providing fact-based information that is clear, visual and accessible.
- **Issue 2:** The updated RTP needs to more realistically take into account serious fiscal constraints facing the region and be based on tangible (e.g., measurable) outcomes in the context of the broader New Look planning effort. Stakeholders relayed their clear understanding that transportation funding in the region would be under serious fiscal constraints due to a wide variety of factors including reductions in Federal contributions to local transportation funding, and a resistance to raising tax revenue at the State and Local level. They also expressed support for considering funding options and using desired outcomes to identify and prioritize transportation investments that are crucial to the region's economy and that most effectively integrate the land use, economic, environmental and transportation objectives embodied in the 2040 Growth Concept.

¹ The team is led by Terry Moore of ECONorthwest, and includes staff from MIG, Kittelson and Associates as well as Steve Siegel and Bob Moore.

- **Issue 3:** Effective coordination and collaborative partnerships will be key for the success of the RTP update. This coordination and partnering needs to occur with the local, regional, state and federal agencies and jurisdictions (including Washington State and the upper Willamette Valley), and be expanded to include the local and regional business communities, environmental organizations, and other interest groups that have been traditionally under-represented. Building partnerships with agencies and jurisdictions and a broad array of business, environmental and other community-based organizations will help the outreach effort be more effective.

Staff and the ECONorthwest team prepared a discussion draft work program that addresses federal, state and regional policy and requirements, integrates with the overall New Look planning process, coordinates with development of the *Regional Freight and Goods Movement Plan* and the *Regional Transportation System Management and Operations Plan*, and responds to the key technical, policy and process issues identified during the Scoping Phase. The work program was released for review by Metro’s standing committees and Federal Highway Administration (FHWA) Division Office staff and Federal Transit Administration (FTA) Regional Office staff from May 10 through May 24, 2006. MCCI reviewed the public participation plan component of the work program on June 7, 2006.

Refinements to the work program are recommended to address comments received during the review period and are described in **Attachment 1**. The recommended refinements are reflected in Exhibit A to Res. 06-6610 (For the Purpose of Approving A Work Program for the 2035 RTP Update). **Attachment 1** is divided into three sections:

- **Section 1** includes recommended refinements identified since May 10. The recommendations were approved by MTAC on May 17 and by “consensus of the members present” at MPAC on May 24.
- **Section 2** includes recommended refinements identified in consultation with Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) staff. These recommendations were not considered by MTAC or MPAC due to the timing of the consultation.
- **Section 3** includes recommended refinements identified during the TPAC discussion on May 26.

The 2035 RTP update technical and policy evaluation will inform, and be informed by, a larger process of stakeholder engagement and public decision-making. A summary of the project timeline, major tasks, products and outreach strategies is provided in **Attachment 2**.

RELATIONSHIP TO THE NEW LOOK REGIONAL PLANNING PROCESS

In 2005, the Metro Council initiated a project called the New Look at Regional Choices (the New Look) is a regional process to update Metro’s long-range strategies and policies for managing growth. The process will focus primarily on updating the region’s implementation tools to best support the region’s vision for urban form, the economy, transportation, and the environment. At the end of 2006, the Metro Council will adopt updated policies and implementation strategies, which may include proposals for the 2007 Oregon Legislature and policy direction on transportation investment priorities to be integrated into the 2035 RTP. The RTP Update is simultaneously the transportation element of the New Look. Metro wants the region’s land use and transportation policies work together to enhance the region’s economic strength and livability.

RELATIONSHIP TO METRO-REGION PLAN FOR FREIGHT AND GOODS MOVEMENT

Metro will undertake a planning effort, in coordination with the update of the Regional Transportation Plan (RTP), which focuses specifically on the region’s freight transportation system. To accomplish this work, Metro sought and was awarded a 2005-2007 Biennium Transportation & Growth Management

Grant to prepare a regional plan for freight and goods movement. A separate, but coordinated work program will be followed for this planning effort as described in **Attachment 3**.

The development of the *Regional Plan for Freight and Goods Movement* will be coordinated with technical and public participation elements of the broader Metro initiatives to evaluate implementation of the Region 2040 Growth Concept (*New Look*) and to update the region's transportation system plan (*2035 RTP Update*) to ensure a consistent planning approach. Relevant policy, project, and implementation strategy recommendations will be forwarded to the New Look and the 2035 RTP update process and decision-making framework.

SUMMARY OF THE TECHNICAL WORK AND POLICY DEVELOPMENT COMPONENT OF THE WORK PROGRAM

This section summarizes the major technical and policy development tasks to be completed during the 2035 RTP update.

- **Phase 1 (Scoping: February – June 2006):** This phase focused on engaging stakeholders, identifying issues to address and development of the 2035 RTP update work program.
- **Phase 2 (2040 Research and Policy Development: June – December 2006):** A significant portion of the Phase 2 research and policy development will focus on analyzing the transportation system conditions and trends (including financial trends and funding options) and identifying public priorities for transportation and willingness to pay for desired transportation services and programs. Analysis of land use and transportation policy scenarios will be conducted as part of the broader New Look effort. In addition, the Contractor will assist Metro with developing an outcomes-based evaluation framework (e.g., define outcomes and criteria) that will be used to evaluate the New Look scenarios and to identify, evaluate and prioritize critical transportation investments in Phase 3 of the RTP update. The Contractor will also assist Metro with updating the financially constrained revenue forecast and evaluating funding options. This work will culminate in preparation of a State of Transportation in the Region report and policy recommendations to be considered as part of the broader New Look effort and Phase 3 of the RTP update to refine the plan's the policy, infrastructure and system management projects and implementation strategies.
- **Phase 3 (System Development and Policy Analysis: January-September 2007):** The focus of this phase of the RTP update is to integrate the New Look policy direction and findings from the regional transportation system assessment to update the plan's policies and implementation strategies and prioritize the financially constrained system of transportation investments for the region. Metro will conduct a process to solicit infrastructure and demand and system management projects and programs, and MPAC, JPACT and the Metro Council will prioritize these investments to best support the 2040 Growth Concept and desired outcomes within the updated financially constrained revenue forecast defined in Phase 2. The transportation investments will be analyzed using the regional travel demand model and the outcomes-based framework defined in Phase 2. This phase marks the end of the technical and policy development work and will result in preparation of the discussion draft 2035 RTP that will be released for public review.
- **Phase 4 (Adoption Process: September-November 2007):** The focus of this phase is the 45-day public comment period and refining the plan based on this review. The primary activities of this phase are described in the stakeholder engagement and public participation component of the work program below. A final draft 2035 RTP will be approved by MPAC, JPACT and the Metro

Council in November 2007, pending air quality conformity analysis to be conducted during Phase 5.

- **Phase 5 (December 2007 – February 2008):** The work activities of this phase will focus on completing an air quality conformity determination to demonstrate the updated plan meetings federal and state air quality requirements. Findings of consistency with state and federal planning requirements will also be developed. The final 2035 RTP and findings will be submitted to FHWA and FTA for federal certification and the Department of Land Conservation and Development for post-acknowledgement review upon completion of the conformity determination.

The process leading to an adopted RTP, and the transportation investments it authorizes has been designed to provide good information (accurate, relevant, and understandable) about project and program performance (benefits and costs) in an open process that facilitates decisions about transportation investments that best advance the 2040 Growth Concept and are efficient and equitably serve the public.

SUMMARY OF STAKEHOLDER ENGAGEMENT AND PUBLIC PARTICIPATION COMPONENT OF THE WORK PROGRAM

The public participation plan is designed to meet regional, state and federal requirements for public participation and respond to the key issues raised during the scoping phase. This section describes the *stakeholder engagement and outreach* components that will inform development of an updated 2035 RTP plan, and support the decision-making role of the Metro Council, JPACT and MPAC and the participatory role of public agencies, targeted stakeholder groups and the general public.

Metro's targeted stakeholders and planning partners include the 25 cities, three counties and affected special districts of the region, Oregon Department of Transportation (ODOT), Oregon Department of Environmental Quality, Port of Portland, SMART, TriMet and other interested community, business and advocacy groups as well as state and federal regulatory officials and resource agencies. Metro also coordinates with the City of Vancouver, Clark County Washington, the Port of Vancouver, the Southwest Washington Regional Transportation Council (RTC), C-Tran, the Washington Department of Transportation, the Southwest Washington Air Pollution Control Authority and other Clark County governments on bi-state issues.

This broad spectrum of stakeholders is the primary focus of the public participation plan. A variety of methods for engaging this audience have been identified, including focused discussions at Regional Forums, Mayors'/Chair's Forums, stakeholder workshops, Metro Advisory Committees and established County Coordinating Committee's meetings, focus groups, technical workshops and other methods of communication and engagement as described below.

A second priority for outreach is the general public. The general public will be engaged and provided opportunities to give input throughout the planning process. A significant element of this portion of the work program is a public opinion survey that will be conducted in English and Spanish to solicit a statistically valid measure of public values and needs. In addition, Metro's website will host an interactive project website that will include an on-line survey and a budget scenario exercise/game survey. The project website will also be used to provide information about the update process, timeline with key decision points identified, fact sheets, newsletters and other pertinent information about the process. The transportation hotline will be updated to include a 2035 RTP update message program that includes timely information about key decision points and provides an option for leaving comments and requesting additional information. In addition, feedback will be solicited on specific plan elements during public comment periods, public hearings and as part of formal review processes. Opportunities to partner with

local governments, business and community groups and use public access television to broaden awareness of and participation by the general public in the 2035 RTP update will be identified throughout the process.

Media outreach is also a significant element of the participation plan with the intent of using earned mass media to provide information to the general public and key stakeholders throughout the process. As appropriate, briefings of reporters and editorial boards will be conducted, and press releases, media packets and civic journalism will be developed. Two newsletters will be developed at key decisions points. Fact sheets explaining components of the plan will be developed as needed. The newsletters and fact sheets will be distributed through Metro's website, at events and upon request. Summary reports documenting the results and findings of major tasks will also be developed and made available on Metro's website and meeting presentations.

Notices of key decisions will be distributed through community newspapers, electronic newsletters, the transportation hotline and the Metro website. A formal 45-day public comment period will be scheduled to coincide with release of a discussion draft RTP in September 2007. Comments will be collected through Metro's transportation hotline, website, US mail, fax and email during this period. Four public hearings will be scheduled prior to adoption of the plan package, where citizens may submit testimony for the public record in person, by US mail, fax, or email directly to the Metro Council. In addition, the RTP and its attendant Air Quality Conformity Analysis will be made available for a formal 30-day public review period before final adoption in February 2008.

A collaborative effort will be required between the consultant team, Metro Council, JPACT, and staff to ensure that the public participation plan is an effective tool for developing and creating a constructive, meaningful, and broad-based dialogue with the citizens and decision-makers of the Portland metropolitan region.

Successful outcomes of this ambitious RTP update process depend on the active participation of local, state and regional decision makers, other transportation providers, public agency staff, and other stakeholders that include the business community, community and environmental groups, and residents of the region. Generally, the outreach component will seek to inform, educate and gain input in a targeted fashion. The public participation plan relies on educational opportunities and innovative tools and forums/workshops that provide for adequate and effective, though focused public dialogue. With targeted input from stakeholders and the broader community, Metro and its regional partners will update the RTP to prioritize critical transportation investments to best support the desired economic, environmental, land use and transportation outcomes the New Look identifies and, as a result, better implement the 2040 Growth Concept vision.

The public participation plan builds responds to two key directives from Metro Council: (1) the questions for the public and stakeholders are not about the broad vision for growth and development in the Portland metropolitan region (that vision is articulated in the 2040 Growth Concept, and has been supported several times in various ways by local governments and the general public); rather, the questions are about implementation (what can the region do, in the context of the RTP, with transportation investments, to better achieve the 2040 Growth Concept vision); and (2) focus on elected and appointed representatives of public agencies and interest groups, not on broad-based outreach to the general public (though opportunities for public education, engagement and comment will be provided in a targeted manner).

Collectively, these outreach efforts and strategies will educate stakeholders and inform the technical and policy development work on community values, desired outcomes and transportation needs, investment priorities and implementation strategies. A final summary report containing a complete evaluation and

overview of the outreach effort, including a discussion of the successes and potential areas for improvement will be created at the end of the update process to inform future updates.

SUMMARY OF 2035 RTP UPDATE DECISION-MAKING FRAMEWORK

This section summarizes the decision-making framework that will be used during the process.

Metro's transportation planning activities are guided by a decision-making framework of consultation with and coordination among federal, state, regional and local government agencies, citizens and interest groups. Metro facilitates this consultation and coordination through four advisory committee bodies—the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

The 2035 RTP updating process will rely on this existing decision-making structure for development, review and adoption of the plan. MPAC, JPACT and the Metro Council will make recommendations at key decision points based on input from TPAC, MTAC, the Council-appointed Regional Freight Plan Task Force and the public participation process. SAFETEA-LU provisions also require additional consultation with state and federal resource agencies, and tribal groups not represented on Metro's existing committee structure. Opportunities for consultation with these groups will be identified in coordination with FHWA staff.

Finally, the *Regional Freight and Goods Movement Plan* element of the RTP update will also be guided by a Council-appointed 33-member Task Force and a Technical Advisory Committee (TAC).² Recommendations from the Regional Freight TAC will be forwarded to the Regional Freight and Goods Movement Plan Task Force. The Task Force will make its recommendations to TPAC, JPACT and the Metro Council. The recommendations will be forwarded to the 2035 Regional Transportation Plan process for adoption into the region's long-range transportation system plan.

SUMMARY OF 2035 RTP UPDATE CONTRACT SERVICES BUDGET

Resolution No. 05-3610A authorized \$184,000 for the use of contract services for the RTP update and execution of a two-step consulting service contract to develop a work scope for the RTP update, and perform the proposed tasks upon satisfactory completion of the scoping phase. This section describes the budget elements for the two-step contract.

- The original Phase 1 (Scoping) budget for contractor services was for \$35,000 for the scoping phase for the period from February 17 through May 31, 2006. Contract Amendment #1 was approved by ODOT on April 27, 2006 to include an additional budget of \$25,000 for New Look June Regional Forum related-contract services. This amendment was funded through the New Look work program contract services budget for fiscal year 2005-06.
- The cost of Contract services for Phase 1 increased in order better to support development of a detailed work program. Metro staff negotiated providing an additional \$15,000 to the Phase 1

² The Regional Freight and Goods Movement Task Force will be comprised of 33 members from the community, private and public sectors, representing the many elements of the multimodal freight transportation system and community perspectives on freight. The Freight Technical Advisory Committee (TAC) will be comprised of public sector staff from the local, regional, and state agencies operating within Metro's jurisdictional boundaries. The TAC will provide input and review of technical work products.

budget to compensate the Contractor for the cost of increased services. This requires an amendment to the existing Contract No. 926975 for this amount.

- Additional ECONorthwest team contract services are summarized in the 2035 RTP Update Work Program (see Exhibit A to Resolution 06-3661). The corresponding budget for this contract is for work from June 1, 2006 through June 30, 2007, as described below. The estimated budget for contract services is \$215,000 for the stakeholder engagement elements of the work program and \$120,000 for technical work and policy development assistance as described in the work program for a total of \$335,000. This includes an additional \$25,000 for New Look December Regional Forum related contract services.

The corresponding budget for all contract services for the period from February 17, 2006 to June 30, 2007 is summarized in Table 1.

Table 1. 2035 RTP Update Contract Services Budget Summary for February 17, 2006 – June 30, 2007) for Metro Contract No. 926975 (ODOT Contract No. 25391)

Phase 1			Total
(Feb. 17– May 30, 2006)			
Task 1: Project Management			\$2,813
Task 1.2: Develop 2035 RTP Work Program and Public Participation Plan			\$32,187
<i>Subtotal Phase 1</i>			\$35,000
Contract Amendment #1			
<i>(Amendment signed by Metro on April 20, 2006 and ODOT on April 27, 2006)</i>			
Contract Amendment #1			
New Look June Regional Forum			\$25,000
<i>Subtotal Contract Amendment #1</i>			\$25,000
<i>Subtotal Phase 1 and Contract Amendment #1</i>			\$60,000
Phase 2			
(June 1 – Dec. 30, 2006)			
	Outreach	Technical	Total
Technical Analysis Plan (TAP)			
Task 1: Data review and collection		\$5,000	\$5,000
Task 2: Develop outcomes-based framework		\$29,000	\$29,000
Task 3: Identify public priorities and desired outcomes for transportation		\$5,000	\$5,000
Task 4: Financial Analysis		\$42,000	\$42,000
Task 5: Land Use/Transportation Scenario Analysis		\$10,000	\$10,000
Task 6: 2035 Base Case Travel Forecasting Analysis		\$4,000	\$4,000
Task 7: Economics/Demographics Analysis		\$4,000	\$4,000
Task 8: Environmental Analysis		\$1,000	\$1,000
Task 9: Transportation System Conditions Analysis		\$2,000	\$2,000
Task 10: Systems Assessment		\$4,000	\$4,000
<i>Subtotal TAP</i>			\$106,000
Public Participation Plan (PPP)			
New Look Regional Forums (Component 1)	\$35,000		\$35,000

Opinion Survey (<i>Component 1</i>)	\$25,000		\$25,000
Focus Groups (<i>Component 1</i>)	\$10,000		\$10,000
Stakeholder Workshops (<i>Component 1</i>)	\$10,000		\$10,000
Web Based Outreach (<i>Component 1</i>)	\$15,000		\$15,000
Agency/Jurisdictional Outreach (<i>Component 2</i>)	\$12,000		\$12,000
Outreach Toolkit (<i>Component 2</i>)	\$20,000		\$20,000
Project Management	\$10,000		\$10,000
<i>Subtotal PPP</i>	\$137,000		\$137,000
<i>Subtotal Phase 2 (June 1 – Dec. 30, 2006)</i>	\$137,000	\$106,000	\$243,000
Phase 3 (Jan. 1 – June 30, 2007)			
	Outreach	Technical	Total
<u>Technical Analysis Plan (TAP)</u>			
Task 1: Policy Development		\$2,000	\$2,000
Task 2: Outcomes-based Transportation Solutions Identification and Prioritization		\$3,000	\$3,000
Task 3: System Development and Analysis		\$3,000	\$3,000
Task 4: Implementation Strategies		\$3,000	\$3,000
Task 5: Develop Discussion Draft RTP		\$3,000	\$3,000
<i>Subtotal TAP</i>		\$14,000	\$14,000
<u>Public Participation Plan (PPP)</u>			
Focus Groups (<i>Component 1</i>)	\$10,000		\$10,000
Stakeholder Workshops (<i>Component 2</i>)	\$10,000		\$10,000
Web Based Outreach (<i>Component 1</i>)	\$15,000		\$15,000
Agency/Jurisdictional Outreach (<i>Component 2</i>)	\$12,000		\$12,000
Technical Workshops (<i>Component 2</i>)	\$25,000		\$25,000
Project Management	\$6,000		\$6,000
<i>Subtotal PPP</i>	\$78,000		\$78,000
<i>Subtotal Phase 3 (Jan. 1 – June 30, 2007)</i>	\$78,000	\$14,000	\$92,000
CONTRACT No. 92675 BUDGET SUMMARY			
Phase 1 and Contract Amendment #1 for the period from Feb. 17 through May 30, 2006			\$60,000
Phase 1 Cost Increase (see Table note #1)			\$15,000
Phases 2 and 3 (Contract Amendment #2) for the period from June 1, 2006 – June 30, 2007	\$215,000	\$120,000	\$335,000
Contract No. 926975 Total from Feb. 17, 2006 – June 30, 2007 (see Table note #2)			\$410,000

Table notes:

- Metro staff negotiated providing an additional \$15,000 to the Phase 1 budget to compensate the Contractor for the cost of increased services.
- Budget for this contract is for work from Feb. 17, 2006 through June 30, 2007. Work after that period will be from funds from the fiscal year starting July 1, 2007 through June 30, 2008. Contractor tasks and budget to be determined through a supplemental contract amendment.

The estimated budget of \$350,000 (\$15,000 for Phase 1 increased costs and \$335,000 for Phases 2 and 3) exceeds the Phase 2 amount of \$125,000 authorized by Res. 05-3610A. However, the current fiscal year 2005-06 and proposed fiscal year 2006-07 planning department budget for RTP update contract services is adequate to fund the Contract services budget for both Phase 1 and Phase 2/3 of Contract No. 926975. The New Look work program budget for contract services for fiscal year 2005-06 and proposed fiscal year 2006-07 is adequate to fund the two New Look Regional Forums contained within the respective Contract Amendment #1 and Contract Amendment #2 budgets.

Table 2 summarizes the corresponding revenue sources for the Consultant contract portion of the 2035 RTP Update work program for the period from February 17, 2006 – June 30, 2007.

Table 2. Contract No. 92675 Revenue Budget Summary for February 17, 2006 – June 30, 2007) for Metro Contract No. 926975 (ODOT Contract No. 25391)

	Metro General Fund	Metro Transportation Grants	Total
Phase 1	\$22,500	\$12,500	\$35,000
Contract Amendment #1	\$25,000	\$0	\$25,000
Contract Amendment #2 (Phase 1 cost increase)	\$0	\$15,000	\$15,000
Phases 2 and 3 (Contract Amendment #2)	\$36,500	\$298,500	\$335,000
Total	\$84,000	\$326,000	\$410,000

Work program contractor services identified to occur after that period will be from funds from the fiscal year starting July 1, 2007 through June 30, 2008. Contractor tasks and budget will be determined through a supplemental contract amendment.

ANALYSIS/INFORMATION

1. Known Opposition – No known opposition.
2. Legal Antecedents - On September, 22, 2006, the Metro Council initiated an update to the regional transportation plan with approval of Resolution #05-3610A (For the Purpose of Issuing a Request for Proposals to Develop a Work Scope for an Expanded 2005-08 Regional Transportation Plan Update that Incorporates the “Budgeting for Outcomes” Approach to Establishing Regional Transportation Priorities). The RTP update fulfills both state and federal transportation planning requirements. The 2035 update will result in continued compliance with federal regulations that require the RTP to be updated at least every four years, and state regulations that require the RTP to be updated every 5 to 7 years.
3. Anticipated Effects – This resolution approves the 2035 RTP Update work program and authorizes the Chief Operating Officer to amend Metro Contract No. 926975, Amendment #2, for additional time, budget and scope for consulting services identified in Exhibit A, for the period from February 17, 2006 to June 30, 2007, not-to-exceed \$410,000, including a transfer of \$15,000 from the Phase 2 budget to compensate the Contractor for Phase 1 cost increases.
4. Budget Impacts - None. The current fiscal year 2005-2006 and proposed fiscal year 2006-2007 planning department budget for RTP Update contract services and New Look contract services is

adequate to fund the estimated Contract budget, not-to-exceed \$410,000 without additional Council approval.

RECOMMENDED ACTION

Staff recommends approval of Resolution No. 06-3661.

ATTACHMENT 1 to Staff Report to Resolution No. 06-3661

Section 1 Summary of Recommended Work Program Changes

Section 1 summarizes proposed work program changes identified between May 10 and May 26, the source of the proposed change and recommendations for how to address the proposed changes.

Opportunities for input on the overall RTP update approach and discussion draft work program were provided to the following committees: MPAC on May 10, JPACT on May 11, RTO Subcommittee on May 11, a joint TPAC/MTAC workshop on May 15 and the Bi-State Transportation Committee on May 18. The recommendations were approved by MTAC on May 17 and approved by “consensus of the members present” at MPAC on May 24. TPAC approved the recommendations on May 26.

Comment 1: MPAC should be more of a partner with JPACT in this RTP update. (MPAC, 5/10/06)

Recommendation: Agree. MPAC plays a significant role in this update – because of the link to the New Look, but also because adoption of the RTP is also considered a land use action under state law – it represents the transportation system plan for the region. The current draft work program identifies significant opportunities to foster this partnership throughout the process on key work program elements, such as development of an outcomes-based evaluation framework, identification of desired (and measurable) outcomes, development of land use/transportation scenarios and prioritizing transportation investments to best meet desired outcomes within fiscal constraints. Opportunities to hold Joint TPAC/MTAC workshops and possibly joint JPACT/MPAC meetings will be identified as the work program is implemented.

Comment 2: The work program should clarify how differences between MPAC and JPACT recommendations will be reconciled. (MTAC, 5/17/06)

Recommendation: Agree. The current draft work program identifies technical and policy development tasks and products for which MPAC will make formal recommendations to JPACT through TPAC – this is listed under the “Responsibilities” section for each task of the work program. Examples include development of an outcomes-based evaluation framework, identification of desired (and measurable) outcomes, development of land use/transportation scenarios and prioritizing transportation investments to best meet desired outcomes within fiscal constraints. The work program has been designed to build consensus on these items as part of the process. In the event that differences occur, joint MPAC/JPACT meetings will be held to discuss and reconcile differences on these and other critical policy issues. The work program will be revised to clarify this element of the decision-making structure of the process.

Comment 3: Incorporation of local transportation system plans (TSPs) needs to be emphasized in research and outreach efforts. The work program should be expanded to include an analysis of how local transportation system plans and capital improvement plans are implementing 2040 to identify how well 2040 is being implemented locally from a transportation perspective. This information could be used to highlight conflicts with 2040 and/or between local and regional plans. (MTAC, 5/17/06)

Recommendation: Agree. The current draft work program addresses these issues. Currently, the RTP incorporates local TSPs by including locally identified projects of regional significance that are consistent with regional policies and system designations. Consequently, the 2035 Base Case analysis of land use and transportation include both the RTP and local TSPs. As we assess the effectiveness of the base case and compare it to what outcomes the region wants to accomplish, the region will need to make some

tough choices about what set of transportation investments and strategies we need to make at the regional and local level.

The Phase 2 research and analysis (particularly Tasks 4, 6, 7, 9 and 10) will inform those policy choices in the context of the broader New Look effort. Current RTP projects may be modified and new locally identified projects may be added to the RTP subject to the process described in the work program. Phase 3 of the RTP update includes a project solicitation process for projects to be forwarded to the RTP for consideration that best meet desired outcomes and New Look policy direction, and fall within the updated financially constrained revenue forecast developed during Phase 2. The system performance of projects included in an updated RTP Financially Constrained System will be conducted during Phase 3 after the project solicitation process to assess how well the updated plan meets the outcomes the region wants to accomplish.

Outreach for all of these elements will be conducted in partnership with public agencies and other key stakeholder groups with an emphasis on improving community awareness and understanding of the region's transportation needs and funding issues in the context of the broader New Look effort. A significant element of the research in Phase 2 is to identify desired outcomes and public priorities for transportation, and the public's willingness to pay for those outcomes and priorities. This will inform the outcomes and policy choices MPAC, JPACT and the Metro Council recommend.

Comment 4: The outreach strategies should be expanded to include a web blog for the RTP update. (MPAC, 5/10/06)

Recommendation: No change recommended. While this is an innovative approach for gathering public input, the draft public participation plan is intended to be targeted, yet representational throughout the update process. The relatively compact timeline and current staffing resources do not allow for meaningfully monitoring, compiling and reporting out more free-form input that would be provided through a web blog. The draft work program includes other web-based outreach strategies as well as focus groups, targeted workshops and other means that will be used to gather input throughout the process.

Comment 5: Revise the description of the various components of the public participation plan to clarify that Metro will conduct outreach in partnership with local governments. (Joint MTAC/TPAC Workshop, 5/15/06)

Recommendation: Agree. The public participation plan will be modified to make this clarification.

Comment 6: Expand the public participation plan to provide additional targeted workshops and to build new partnerships in the community with both the private sector and non-profits. This update should be an opportunity to meaningfully connect with groups that traditionally have not been part of previous RTP update processes, including users of the system, not just the providers. (Joint MTAC/TPAC Workshop, 5/15/06)

Recommendation: No change recommended. The draft public participation plan has been designed to be targeted, yet representational to include a broad spectrum of interests, including users of the system and groups that have been traditionally underrepresented in previous RTP updates. The draft plan includes 5 targeted (stakeholder) workshops, 5 focus groups, 6 agency/jurisdictional outreach meetings and 5 technical workshops (called technical topic and interest area collaboration and coordination). At a broad level, the purpose of these meetings is to provide input on the technical and policy development work before and after it is completed. With the exception of the agency/jurisdictional outreach meetings – the

remaining meetings will be specifically designed to include users of the system and groups that have been traditionally underrepresented. The draft participation plan fits within an estimated budget for this element of the update. In order to add more targeted workshops, or other outreach elements, a reduction in other outreach strategies will need to be identified. There is some flexibility to shift the number of targeted workshops, focus groups and technical team workshops (e.g., have 4 focus groups instead of 5 in order to add one more targeted workshop). This will be addressed as the work program is implemented to most effectively gather and use input to guide the technical work and policy development within the current estimated budget.

Comment 7: Create a sideboards document that describes the federal, state and regional legal requirements for the RTP update that will be referenced throughout the process. Requirements to be described include: SAFEATEA-LU, Oregon Transportation Plan, Transportation Planning Rule and the Oregon Highway Plan. (TPAC/MTAC workshop, 5/15/06)

Recommendation: Agree. A regulatory review memo has been prepared during the scoping phase that summarizes recent plans and regulatory changes with implications for the update to the Regional Transportation Plan. The memo will be modified as necessary to serve as this sideboard document, including integration of recent federal guidance on integrating the National Environmental Policy Act (NEPA) into system planning.

Comment 8: A base year of 2005 should be used for the background and research in Phase 2 of the update. The region changed significantly between 2000 and 2005, and if more recent information is available it should be used. (RTO Subcommittee, 5/11/06 and TPAC/MTAC Workshop, 5/15/06)

Recommendation: Agree, if more recent data is available. For modeling purposes, a base year of 2005 will be used for comparison with the 2035 Base Case during Phase 2 and RTP systems developed during Phase 3. More recent data will also be used, if readily available, for the system conditions analysis and assessment during Phase 2 (Tasks 7 – 10).

SECTION 2. SUMMARY OF SUPPLEMENTAL RECOMMENDED WORK PROGRAM CHANGES

This section summarizes supplemental recommended work program changes identified since May 10 in consultation with FHWA and FTA staff. These recommended refinements were not considered by MTAC or MPAC due to the timing of the consultation. TPAC approved the recommendations on May 26.

Comment 1: Important for bicycle and pedestrian system analysis, and updated bike and pedestrian related policies, projects and implementation strategies to emphasize access to transit. (FHWA/FTA consultation, 5/17/06)

Recommendation: Agree. The work program will be revised to call out this emphasis.

Comment 2: Include consultation of Federal and state wildlife, land management and regulatory/resource agencies during the process to ensure adequate consideration of environmental impacts at a transportation system planning level of analysis. (FHWA/FTA consultation, 5/17/06)

Recommendation: Agree. The work program will be revised to include consultation with the Collaborative Environmental and Transportation Agreement for Streamlining (CETAS) group. CETAS includes state and federal resource agencies, including FHWA, National Marine Fisheries, ODOT, DLCD, ODEQ, Oregon Department of Fish and Wildlife, State Historic Preservation Office, Oregon Division of State Lands, Oregon Parks and Recreation, U.S. Army Corp of Engineers, U.S. Environmental Protection Agency and U.S. Fish and Wildlife Service.

Comment 3: Expand list of environmental considerations in Phase 2, Task 8 to include (when available): likely archeologically-sensitive areas, conservation opportunity area maps, State sensitive species lists, maps of previous mitigation sites, existing mitigation banks and service areas, potential ODOT mitigation banks and service areas, water quality limited bodies and recovery and conservation plans. (FHWA/FTA consultation, 5/17/06)

Recommendation: Agree. The work program will be revised to add these additional considerations.

Comment 4: Expand transportation system analysis description to call out need to conduct environmental analysis at a system-level to be determined in consultation with Federal Highway Administration and Federal Transit Administration staff to ensure adequate consideration of the National Environmental Policy Act (NEPA) in transportation system planning. (FHWA/FTA consultation, 5/17/06)

Recommendation: Agree. The work program will be revised to add these additional considerations to Task 3.2 (Phase 3).

Comment 5: Ensure 2035 RTP update addresses the findings and recommendations of the Public Transit-Human Services Transportation Plan currently underway, including activities and projects to support low-income access to jobs and elderly and disabled access to transit. (FHWA/FTA consultation, 5/17/06)

Recommendation: Agree. The work program will be refined to add a new Task 9.6 in Phase 2 to document recommendations from the update of the Tri-County Elderly and Disabled Transportation Plan (EDTP) and how the recommendations will be coordinated with and implemented through the 2035 RTP. The findings and recommendations of the EDTP will be considered during Phase 3 of the RTP update as part of the project solicitation process and development of implementation strategies.

SECTION 3. SUMMARY OF TPAC SUPPLEMENTAL RECOMMENDED WORK PROGRAM CHANGES

This section summarizes supplemental recommended work program changes identified during the TPAC discussion on May 26. These recommended refinements were not considered by MTAC or MPAC due to the timing of the discussion. TPAC approved the recommendations on May 26.

Comment 1: It is important for the focus groups, stakeholder workshops and technical workshops to engage stakeholders not traditionally represented or who have not traditionally participated in previous updates to the RTP. In addition, new approaches should be considered to educate and engage the general public on the transportation issues facing the region (e.g., use public access channels and partner with local governments and other stakeholders such as the Bicycle Transportation Alliance, AAA, business groups and others when appropriate to host workshops, provide RTP update information and provide weblinks from their websites to the RTP update project website). (TPAC, 5/26/06)

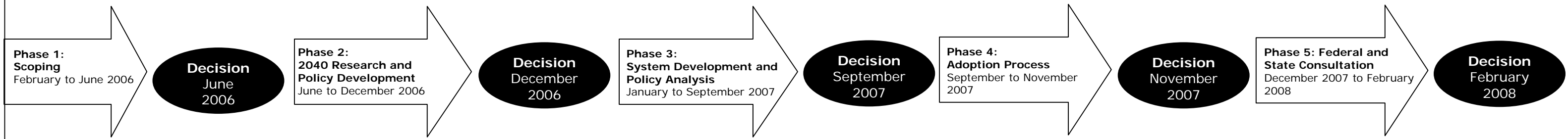
Recommendation: Agree. The work program will be revised to call out these strategies to be considered as the Public Participation Plan is implemented.

Comment 2: Add a task to the work program to facilitate a policy discussion on what constitutes the regional transportation system to be addressed during the RTP update and in the context of the outcomes-based planning approach. (TPAC, 5/26/06)

Recommendation: Agree. The work program will be revised to add this task.

2035 Regional Transportation Plan A New Look at Transportation

Updating the metro region's long-range transportation plan



<p>Work Plan Activities</p> <ul style="list-style-type: none"> Engage stakeholders Identify key issues to be addressed <p>Adopt work program and public participation plan</p> <p>Inter-related activities and ongoing coordination</p> <ul style="list-style-type: none"> Regional Freight Plan (Jan. '06-June '07) Regional Transportation System Management and Operations Plan (April – Nov. '06) Shape of the Region (Jan. – Dec. '06) Investing in Communities (Jan. – Dec. '06) TriMet Tri-County Elderly and Disabled Transportation Plan Update (Nov. '05- Aug. '06) 	<p>Work Plan Activities</p> <ul style="list-style-type: none"> Assess transportation system conditions: <ul style="list-style-type: none"> 2035 base case Transportation, land use, financial, economic, demographic and environmental trends Analyze land use/transportation policy options (scenarios) with Shape of Region/Investing in Communities elements Analyze financial trends and funding options to develop updated revenue forecast Identify priorities and desired outcomes for transportation 	<ul style="list-style-type: none"> Approve financially constrained revenue forecast Approve 2040 New Look policy direction, future growth vision and desired outcomes 	<p>Work Plan Activities</p> <ul style="list-style-type: none"> Update policies and system maps Solicit Financially constrained and Illustrative projects Conduct transportation systems analysis Update policies, benchmarks/performance measures, corridor refinement and new urban area planning guidance, implementation strategies and regulations, and other elements as needed Develop recommended regional investment strategy 	<p>Release discussion draft RTP for formal public comment period</p>	<p>Work Plan Activities</p> <ul style="list-style-type: none"> Solicit comments on draft plan Summarize and respond to comments received in Public Comment Report 	<p>Adopt 2035 RTP, regional investment strategy, pending air quality conformity</p>	<p>Work Plan Activities</p> <ul style="list-style-type: none"> Conduct air quality analysis Develop state and federal consistency findings 	<p>Adopt final 2035 RTP, air quality conformity determination and state and federal findings</p> <p>Submit findings and products to State and Federal Agencies</p>
<p>Products</p> <ul style="list-style-type: none"> Work program Public participation plan and communication strategy 	<p>Products</p> <ul style="list-style-type: none"> System Conditions Report Financial Analysis and Revenue Forecast Report Public Priorities report State of Transportation in the Region Report 	<p>Products</p> <ul style="list-style-type: none"> RTP project database Transportation System Analysis Report Discussion draft regional investment strategy Discussion draft 2035 RTP 	<p>Products</p> <ul style="list-style-type: none"> Public comment report Final 2035 RTP, pending air quality analysis Draft State planning goal findings Draft Federal findings Regional investment strategy 	<p>Products</p> <ul style="list-style-type: none"> Air Quality Conformity Determination Public comment report State planning amendments National Highway System and Federal Functional Classification amendments Outreach summary report 				
<p>Outreach Activities</p> <ul style="list-style-type: none"> Website Stakeholder scoping meetings Regional Forum in April Fact sheet Media outreach 	<p>Outreach Activities</p> <ul style="list-style-type: none"> Website Newsletter Fact sheets Media outreach Regional Forums (June and Dec.) Mayors'/Chairs' Forum (Oct.) Metro committees Agency and jurisdictional outreach CETAS consultation Stakeholder workshops Focus groups Public opinion survey 	<p>Outreach Activities</p> <ul style="list-style-type: none"> Website Newsletter Fact sheets Media outreach 2 Mayors'/Chairs' Forums (Feb. and May) Metro committees Agency and jurisdictional outreach Stakeholder workshops Focus groups Technical workshops Outreach toolkit Transportation hotline 	<p>Outreach Activities</p> <ul style="list-style-type: none"> Website Media outreach Regional Forum (Sept.) Metro committees CETAS consultation 4 public hearings Transportation hotline 	<p>Outreach Activities</p> <ul style="list-style-type: none"> Website Fact sheet Media outreach Metro committees Public hearing Transportation hotline 				



Attachment 3 to Staff Report for Resolution No. 06-3661



Regional Freight and Goods Movement Plan

Scope of Work

BACKGROUND

General Description of Project Area

The project area encompasses the urban portions of Clackamas, Multnomah, and Washington counties and the 25 cities that lie within Metro's jurisdictional boundaries. For the purposes of planning analysis and coordination, this project will also look at urbanized Clark County. The region is the major hub for freight-related activities in Oregon and Southwest Washington and includes an interconnected network of highways, railways, waterways, runways, and pipelines that comprise the regional freight system. Additionally, the region is home to publicly- and privately-owned marine and air terminals, intermodal yards, and warehouse/distribution facilities.

Definitions

JPACT – Joint Policy Advisory Committee on Transportation

NHS – National Highway System

OFAC – Oregon Freight Advisory Committee

OHP – Oregon Highway Plan

OTP – Oregon Transportation Plan

PMT – Project Management Team

RFP – Regional Framework Plan

RSIA – Regionally Significant Industrial Areas

RTP – Regional Transportation Plan

TAC – Technical Advisory Committee

TAZ – Traffic Analysis Zone

TDM – Transportation Demand Management

TPAC – Transportation Policy Alternatives Committee

TPR – Transportation Planning Rule

TSP – Transportation System Plan

WOC – Work Order Contract

WOCPM – Work Order Contract Project Manager

Project Cooperation

This statement of work describes the responsibilities of the entities involved in this cooperative Project. In this Work Order Contract (WOC) the **Consultant** shall only be responsible for those deliverables assigned to the Consultant. All work assigned to other entities are not Consultant's obligations under this WOC, but shall be obtained by Agency through separate intergovernmental agreements which contain a statement of work that is the same as or similar to this statement of work. The obligations of entities in this statement of work other than the Consultant are merely stated for informational purposes and are in no way binding, nor are the

named entities parties to this WOC. Any tasks or deliverables assigned to a sub-Consultant shall be construed as being the responsibility of the Consultant.

Any Consultant tasks or deliverables which are contingent upon receiving information, resources, assistance, or cooperation in any way from another entity as described in this statement of work shall be subject to the following guidelines:

1. At the first sign of non-cooperation, the Consultant shall provide written notice (email acceptable) to Oregon Department of Transportation (Agency) Work Order Contract Project Manager (WOCPM) of any deliverables that may be delayed due to lack of cooperation by other entities referenced in this statement of work.
2. WOCPM shall contact the non-cooperative entity or entities to discuss the matter and attempt to correct the problem and expedite items determined to be delaying the Consultant.

If Consultant has followed the notification process described in item 1, and Agency finds that delinquency of any deliverable is a result of the failure of other referenced entities to provide information, resources, assistance, or cooperation, as described in this statement of work, the Consultant will not be found in breach of contract. The Agency Contract Administrator will negotiate with Consultant in the best interest of the State, and may amend the delivery schedule to allow for delinquencies beyond the control of the Consultant.

Issues Statement

The regional transportation system facilitates the movement of both people and goods. Like the passenger component, the regional freight system comprises multiple modal networks that both compete with and complement one another in the goal of moving things from origin to destination. This project will focus on understanding how the metro-region's freight system functions and addressing its specific needs and impacts.

The region's Commodity Flow Forecast estimates that the amount of freight moved on the system (measured in tons) will double by 2030 in the Portland metropolitan region.¹ Increasing population and significant trends in the logistics and distribution sector, such as the growth of intermodal shipping, just-in-time delivery, and e-commerce, have changed how goods move and have put pressure on the performance of the freight system. Customer demands for quicker and cheaper movement of freight and goods mean system efficiency is paramount for businesses to remain competitive. These trends are driving the growth in freight movement and have real implications for how the region invests in and manages the transportation network and community livability.

The issues surrounding freight and goods movement can be generally catalogued under the heading of network, economic development, and livability. The network-related issues include growth-driven capacity constraints – particularly for the region's roadways, railways, and pipelines – that lead to congestion. Beyond network congestion, there are geometric limitations

¹ *Commodity Flow Forecast Update and Lower Columbia River Cargo Forecast – Update*, Port of Portland, 2002.

and barriers that can impact the ability to efficiently and/or safely move goods by road, or rail or marine vessel in key corridors.

The prospect of increasing freight demand will likely exacerbate friction over the environmental and community livability impacts that are often a byproduct of the business of moving freight and goods. Communities have raised concerns about impacts such as air and water quality; safety and security; noise and vibration; and vehicle operations in mixed use environments that can have negative consequences for livability.

The efficient movement of freight and delivery of goods and services is a key element to keeping the economies of the Portland metropolitan region and the State of Oregon healthy. Due to geographic advantages and decades of infrastructure investment, the regional economy is highly dependent on transportation in comparison with other regions across the country. The distribution and logistics employment accounts for 12% or 1 in 8.33 jobs in the region.² Businesses, large and small, depend on the region's freight system to ship and receive items needed for their operations, from raw materials to finished products. Every day, residents rely on the goods and services delivered to them by an increasingly complex supply chain connected by the transportation network.

With escalating demand from freight movement on regional transportation infrastructure and limited public and private transportation funding, a regional plan for freight movement is needed to address the issues and impacts associated with rising demand and strategically target investment toward appropriate and cost effective solutions.

Transportation Relationship and Benefits

Metro is conducting a planning process that will specifically focus on how the transportation system is used to move freight and deliver goods and services in the Portland metropolitan region. Project will:

- Ascertain what outcomes the public expects from investment in the regional freight system and develop measures to track progress.
- Provide a common base of knowledge about the various elements of the regional freight system.
- Identify issues, needs, and deficiencies in the regional freight system and develop recommended solutions and strategies to address them.
- Plan a multimodal regional network that meets the needs for freight and goods movement in and between 2040 Centers, industrial sites/districts, the national and regional highways system, and intermodal and terminal facilities.
- Identify and prioritize multi-modal freight improvement projects throughout the region that respond to the desired outcomes for the freight transportation system and are consistent with the available financial resources.
- Support regional and state efforts to enhance economic development opportunities through targeted infrastructure investment.

² Oregon Employment Department, Covered Employment and Wages, 3rd Quarter 2004

- Incorporate truck operation needs into regional street design guidelines, particularly in mixed-use centers and corridors.

Federal, State, and Regional Context

The *Metro-Region Plan for Freight and Goods Movement* will assist Metro in meeting its responsibility to plan for goods movement needs, document freight project priorities, and support community livability within the region. The planning effort will be conducted within the context of guiding federal, state, and regional transportation and land use policy.

At the federal level, recently adopted *Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users* (SAFETEA-LU) requires Metro to meet eight planning factors focused on:

- Improving transportation safety
- Enhancing security
- Preserving the existing transportation system
- Supporting economic vitality
- Connecting people, freight, and modes
- Increasing system management and operations
- Minimizing environmental impacts
- Increasing mobility and accessibility

The state of Oregon's Statewide Planning Goal 12, Transportation, and the implementing administrative rule, OAR 660, Division 12, known as the Transportation Planning Rule (TPR), provide a further layer of policy guidance. Goal 12 lists implementing directives including consideration of all modes of transportation (including the various freight modes); identification of needs; avoidance of single mode reliance; minimization of adverse impacts; energy conservation; meeting needs of transportation disadvantaged; strengthening the economy by facilitating the flow of goods and services; and conformity with land use plans. TPR is the road map for the preparation of transportation system plans (TSP) by all jurisdictions responsible for transportation planning. TSPs prepared at the state, regional and local level are required to identify the needs for movement of goods and services to support economic development, and to plan for roads, air, rail, water, and pipeline transportation to meet the identified needs. TPR also establishes mandates for linking transportation planning with land use, dictating that TSPs identify needs for movement of goods and services to support planned industrial and commercial development.

The Oregon Transportation Plan (OTP) and the Oregon Highway Plan (OHP) are the long-range plans for the state's transportation and highway system, respectively. The OTP provides policy guidance, investment strategies, and key initiatives for the full array of the state's freight infrastructure including aviation, pipelines, ports, rails, and roads. Policy 3.1, An Integrated and Efficient Freight System, directs the state to "promote an integrated and efficient freight system involving air, barges, pipelines, rail, ships and trucks to provide Oregon a competitive advantage by moving goods faster and more reliably."

OHP identifies policies and investment strategies for the state's highway system. Policy 1C, State Highway Freight System, identifies a network of roads that ensure the mobility of freight movement. Policy 4A addresses the need to balance efficient movement of freight with the needs of other users and the local communities the freight routes serve. The policies and strategies of both the OTP and the OHP will provide the foundation for addressing freight issues in the regional freight plan.

At the regional level, the 2040 Growth Concept identifies the importance of industrial activity to the region by establishing Regionally Significant Industrial Areas (RSIA) as a priority land use. The Regional Framework Plan (RFP) and the Regional Transportation Plan (RTP) identify policies to ensure the efficient movement of freight to RSIA's and Industrial districts. The RTP further identifies project priorities to support movement of goods within the region.

This project is timely as the Metro Council initiated an effort to re-examine how the region should implement the 2040 Growth Concept. This effort, referred to as the "*New Look*" is the umbrella effort that will identify what policies, tools, and strategies are needed to achieve the region's long-range vision to build vibrant and healthy communities.

A parallel and coordinated effort is a comprehensive update of the RTP. Metro's effort to study and plan for freight and goods movement will be highly coordinated with and benefit from these two larger planning initiatives. This project's recommendations will be adopted with the 2035 Regional Transportation Plan. Adoption of the 2035 RTP is anticipated for November 2007.

PROJECT OBJECTIVES

The following project objectives direct the development of the Regional Freight and Goods Movement Plan and provide measures for gauging the successful completion of the planning process. Project will:

- ❑ Develop a set of desired outcomes for managing and improving the regional freight system.
- ❑ Describe the issues and needs for multimodal freight movement (truck, rail, water, air, pipeline) and commercial delivery of goods.
- ❑ Assess and refine current regional transportation policies pertaining to freight and goods movement.
- ❑ Assess and refine current regional freight functional classification system and identify recommended revisions to the federal National Highway System.
- ❑ Identify and prioritize infrastructure and system management improvements for all freight modes that meet the desired outcomes.
- ❑ Evaluate truck movement characteristics and needs and recommended updates to existing Regional Street Design policies and guidelines.
- ❑ Develop implementation strategies including performance measures, environmental and community impact mitigation measures, and follow-up actions.
- ❑ Integrate with parallel efforts to update the Region 2040 Growth Concept and the Regional Transportation Plan.

- ❑ Actively engage freight system providers and users, public agencies, and general public in plan development.
- ❑ Improve community awareness and understanding of freight and goods movement needs and issues.
- ❑ Comply with Oregon’s Statewide Planning Goals 9 - Economic Development and 12 – Transportation, TPR, OTP, and Oregon Highway Plan directives to provide for the needs of goods movement to benefit economic vitality.
- ❑ Provide recommendations that update the freight elements of the RTP including transportation policies, regional freight classification system, infrastructure improvements, street design guidelines, and implementation strategies.

APPROACH

The development of the *Regional Freight and Goods Movement Plan* will be concurrent with broader Metro initiatives to re-evaluate implementation of the regional growth concept (*New Look*) and update the region’s transportation system plan (*2035 RTP*). Metro is coordinating both the technical and public participation elements of these three planning efforts to ensure a consistent planning approach.

Metro will employ a *Budgeting for Outcomes*³ approach to determine investment priorities in all three planning initiatives. The basic tenets of the concept dictate that citizens have an upper limit on the amount they are willing to pay for government services and the public sector needs to adopt a results-based approach to the allocation of limited resources. The concept prescribes a methodology for arriving at the desired results. As part of the 2035 RTP update, Metro will customize the *Budgeting for Outcomes* concept for the purpose of establishing regional transportation priorities. This project will be coordinated with the approach determined for the 2035 RTP, particularly for the public participation and project selection elements.

With regard to building on the good work of others, significant focus on regional freight issues in the past several years have yielded information that will greatly benefit the effort to develop a comprehensive regional freight plan. Notable sources that serve as a springboard for this plan are:

- *Commodity Flow Forecast Update and Lower Columbia River Cargo Forecast (2002)* – The report documents freight flows out to 2030 for the metropolitan region. The forecast provides extensive information about regional commodity flow trends for all freight modes. Metro relies on this data to inform its Regional Truck Model.
- *Regional Freight Data Collection Project* – A multi-jurisdictional project to collect data about the movement of freight on the region’s road network. The project is collecting vehicle classification counts to better calibrate Metro’s Regional Truck Model; conducting roadside surveys in key regional corridors to obtain origin-destination and routing information; obtaining electronic origin-destination/route data from volunteer businesses; and linking data collection results with existing sources to refine truck and

³ David Osborne and Peter Hutchinson, *The Price of Government: Getting the Results We Need in an Age of Permanent Fiscal Crisis*, 2004. For more information on *Budgeting for Outcomes*, see the Public Strategies Group website at www.psg.us.

commodity flow information. Data collection is underway with results becoming available early 2006. This data is pivotal to the refinement of Metro's current truck model, which will be completed in time for use in technical analysis for this project.

- *Cost of Congestion to the Economy of the Portland Region (2005)* – A public-private partnership to study the fiscal impacts of congested roads in the metropolitan region. The study includes industry case studies that identify discrete consequences of congestion on business. It will inform this planning effort with regard to issues facing the movement of freight and goods.
- *City of Portland Freight Master Plan (2005)* – The City of Portland developed a master plan to address freight movement issues within its jurisdictional boundaries. The planning activity generated significant background data on trends, community issues, deficiencies, and system needs for the “first and last mile” connectors that serve many of the region's freight terminals and industrial districts.
- *Oregon Transportation Plan* – The comprehensive update to Oregon's 1992 transportation plan. Although under public review, the OTP provides direction on issues, policy, and investment priorities pertaining to the movement of freight and goods.

The freight planning process is rolling out in three phases. Pre-TGM work includes the formation of a project advisory committee and technical advisory committee, and initial data collection and inventory. The TGM phase constitutes the bulk of technical analysis and culminates in the development of recommendations for policy revisions, prioritized system improvements, and implementation strategies. In the post-TGM phase, Metro will refine the policy, project, and implementation strategy recommendations in coordination with the broader 2035 RTP update process and prepare a regional freight plan document.

DATA FORMAT COMPATIBILITY AND EXPECTATIONS

In order to ensure data is easily transferred between Metro and Consultant team during the course of the project, protocols need to be determined at the outset. Metro relies on MS Office products for written reports, database, and spreadsheet. Consultant must be able to support the following graphic formats: PDF, Adobe Illustrator (AI), and Photoshop (PSD) formats. Metro can support CAD formats up to AutoCAD 2004 and Micro Station design files (.dgn) up to version 8. Metro uses ESRI's ArcMap and ArcGIS for geographic information system mapping and analysis.

With respect to all project deliverables, Consultant shall prepare documents in MS Word, MS Excel and MS Powerpoint software only. With the exception of four concept level graphics for street design, any graphics or other software products requested for insertion to Consultant documents must be produced by Metro.

Consultant shall ensure that any work products produced pursuant to this contract include the following statement:

This project is partially funded by a grant from the Transportation and Growth Management (TGM) Program, a joint program of the Oregon Department of Transportation and the Oregon Department of Land Conservation and Development.

This TGM grant is financed, in part, by federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), local government, and the State of Oregon funds.

The contents of this document do not necessarily reflect views or policies of the State of Oregon.

TRAFFIC ANALYSIS REQUIREMENTS

A professional engineer (civil or traffic) registered in Oregon must perform or oversee all traffic analysis work. Agency Region 1 Traffic staff shall review all draft and final technical reports and shall convey their comments to Agency WOCPM for consideration by Project Management Team and Technical Advisory Committee. All data and calculations, including electronic copies of analysis data, must be submitted to Region 1 Traffic for review and record keeping. Region 1 - Traffic shall review the methodologies used to develop the existing and future volumes.

TASKS

Task 1.0 - Project Management

Objective

Efficiently and effectively manage the completion of tasks needed to produce a quality process and project. Ensure that the project progresses on time and on budget. Also, ensure that the products submitted by Consultant are complete and at a quality level that meet the desired specifications and purposes of the task.

Methodology

Sub-task 1.1, Contract Management

Metro's project manager shall be responsible for the day-to-day project administration and management. Metro shall prepare and submit monthly progress reports along with agency invoices, and project deliverables. Metro shall review and approve Consultant project deliverables and invoices.

Consultant shall submit project deliverables, progress reports, and invoices to Metro and Agency for review and approval.

Sub-task 1.2, Project Management Team

Metro shall coordinate and facilitate Project Management Team (PMT) meetings that include key Metro staff, Consultant, and WOCPM. PMT must be a forum for evaluating progress on work tasks, addressing issues, and providing overall direction for project completion that meets the stated planning objectives. PMT shall meet monthly. Metro shall schedule, prepare agendas, and complete meeting summaries of PMT meetings. Meetings will be held at consultant team offices.

Deliverables

Metro

1.1a Monthly progress reports to Agency

1.1b Invoices

1.2 Project Management Team agendas & meeting summaries

Consultant

1.1 Progress reports and invoices to Metro and Agency

1.2 Attendance at/Participation in Project Management Team Meetings (up to 13).

Schedule

Months 1 - 13

Task 2.0 - Public Participation and Technical Coordination

Objective

Implement a public participation process that generates input from a cross-section of stakeholders involved with and impacted by freight and goods movement. Provide jurisdictional partners with frequent opportunities for coordination and input into the planning process.

Methodology

Sub-task 2.1, Public Participation Setup & Coordination

Metro shall prepare and enact Public Participation Plan specific to freight and coordinated with 2035 RTP processes. Actions taken to prepare Public Participation Plan must include:

- 2.1.1 Metro shall conduct activities, such as fact sheets, on-line questionnaires, and outreach to freight groups, intended to capture input as it relates to the regional freight system and within the larger 2035 RTP update and after its public participation process has been determined. The 2035 RTP will include a public participation process to identify expectations and priorities for the regional transportation system. The process, to be designed, could involve surveys, focus groups, targeted workshops, civic journalism and other public outreach strategies intended to provide a broad sampling of public priorities.
- 2.1.2 Metro shall establish and maintain a project contact database for electronic and/or mail notification of participation events, project updates, and opportunities to review and comment on findings and recommendations.
- 2.1.3 Metro shall create a project web page on the www.metro-region.org site to share project information and gather citizen input.

Sub-task 2.2, Freight Advisory Task Force Management

Freight Advisory Task Force (Task Force) was formed in the pre-TGM phase of the project. Members must include representatives from private and public sector organizations that actively participate in or oversee the movement of freight and goods in the region. Task Force is geographically and freight-modally balanced to ensure a diversity of interests. The role of Task Force is to provide policy guidance; review and comment on materials; and provide input on recommendations.

Metro shall manage Task Force including meeting schedules, agenda/materials preparation, meeting summaries, and correspondence. Metro shall convene up to 10 Task Force meetings during the project. Consultant shall attend a maximum of 5 Task Force meetings, to be assigned by Metro staff. Meetings are listed in the tasks in which they occur.

Sub-task 2.3, Technical Advisory Committee Management

Freight Technical Advisory Committee (TAC) is an established technical committee whose membership consists of staff from many of the local, regional, and state governments operating within Metro's jurisdictional boundaries. TAC shall provide input and review work products with a focus on the technical aspects such as network classification and project definition.

Metro shall manage Freight TAC including meeting schedules, agenda/materials preparation, meeting summaries, and correspondence. Metro shall convene up to 12 TAC meetings during the course of the project. Consultant shall attend a maximum of 6 TAC meetings, to be assigned by Metro staff. Meetings are listed in the tasks in which they occur.

Sub-task 2.4, Street Design Working Group

Metro shall form a Street Design Working Group to provide input and insight into street design issues pertaining to trucks and to guide the formation of recommended revisions to Metro's *Creating Livable Streets- Street Design Guidelines in Task 8*. Street Design Working Group shall also meet during Task 6 to review new or amended projects for potential impacts on other modes including rail, transit, bicycle, and pedestrian. Street Design Working Group must have multi-modal representation and include Metro, Consultant, and Agency. Street Design Working Group shall meet up to four times in this task (Consultant shall attend maximum of two meetings associated with this task and as described in Task 8). Metro shall schedule, agenda preparation, and prepare meeting summaries.

Sub-task 2.5, Project Communications

Metro shall coordinate Project Communications with those committees involved with regional freight issues including but not limited to Metro Council, the Joint Policy Advisory Committee on Transportation (JPACT), Transportation Policy Alternatives Committee (TPAC), Oregon Freight Advisory Committee (OFAC) and Portland Freight Committee. In addition, Metro shall provide informational presentations to groups and organizations interested in or impacted by goods movement. Consultant shall attend the following meetings during the course of the project: Freight Advisory Task Force Meetings (5); Technical Advisory Committee Meetings (6); Street Design Working Group (2); JPACT and Metro Council Briefings (4).

Deliverables

Metro

- 2.1 Public Participation Plan
- 2.2 Freight Advisory Task Force agendas and meeting summaries
- 2.3 Freight TAC agendas and meeting summaries
- 2.4 Street Design Working Group membership, agendas, and meeting summaries
- 2.5 Project Communications

Consultant (Meeting deliverables are listed in the tasks in which they occur):

Freight Advisory Task Force Meetings (5)

Technical Advisory Committee Meetings (6)

Street Design Working Group (2)

JPACT and Metro Council Briefings (4)

Schedule

Months 1 – 13

Task 3.0 - Desired Outcomes

Objective

Work with community to define a set of results-driven outcomes to guide recommendations for policy, infrastructure and system management projects, and implementation strategies pertaining to the freight transportation system.

Methodology

Sub-task 3.1, Outcomes and Performance Measures

Metro shall prepare Desired Outcomes Memorandum documenting the process and results of a public process. As part of preparing Desired Outcomes Memorandum, Metro shall develop and implement a public process for establishing a set of desired outcomes for the freight system that will guide the development of policy, projects, and implementation strategies. This sub-task must be coordinated with the 2035 RTP process for establishing transportation priorities.

Consultant shall prepare a 3-10 page Draft Performance Measures Technical Memorandum, an identification of a set of performance measures for the identified desired outcomes that can be applied to gauge success in achievement over time and which documents the development of performance measures.

Metro shall provide a single consolidated non-contradictory set of comments on draft Performance Measures Technical Memorandum.

Consultant shall prepare a Final Performance Measures Technical Memorandum incorporating comments provided by Metro.

Sub-task 3.2, Freight Advisory Committees Participation

Metro shall convene and participate in up to one TAC meeting and one Task Force meeting under this task. Metro shall consult the advisory committees on the desired outcomes process and identification of performance measures, and ensure that comments from the advisory committees are reflected in the final products.

Deliverables

Metro

3.1a Desired Outcomes Memorandum

3.1b Review and Comment of Performance Measures Technical Memorandum

3.2 TAC & Task Force meetings (1 each)

Contractor

3.1 Draft Performance Measures Technical Memorandum

3.1b Final Performance Measures Technical Memorandum

Schedule

Months 1 – 3

Task 4.0 - System Conditions

Objective

Develop a comprehensive base of information on the characteristics of the region's multimodal freight system to inform an assessment of the current and projected system conditions and support development of recommendations that occur in later tasks.

Methodology

Sub-task 4.1, Source Data Collection and Inventory

Metro shall prepare Database of Freight Data Sources, a listing of public and private source information needed to comprehensively report on freight system conditions in the metropolitan region. Applicable data sources must be categorized as regulatory/policy, modal analysis, commodity flow, land use, and economic development.

Consultant shall provide Review and Comment (oral and/or written) on draft Database of Freight Data Sources and make suggestions to augment the database as necessary.

Sub-task 4.2, Trends and Logistic Patterns Summaries

Metro shall prepare Trends and Logistic Patterns Technical Memorandum analyzing industry trends. Actions taken to prepare Trends and Logistic Patterns Technical Memorandum must include:

- 4.2.1 Metro shall research major trends in the logistics and distribution industry and their effects on the regional movement of freight and goods.
- 4.2.2 As a separate deliverable, Consultant shall identify and interview three to four businesses representing a cross-section of regional shippers to document their supply-chain logistic patterns and reasons for modal choice.
- 4.2.3 As a separate deliverable, Consultant shall prepare a 6-12 page "Logistics Story" for each business type using interview input.
- 4.2.4 Metro shall incorporate the industry trends and logistic stories into a single document.

Consultant shall provide Review and Comment (oral and/or written) on the draft Trends and Logistic Patterns Technical Memorandum.

Sub-task 4.3, Freight System Profiles

Consultant shall prepare 1-5 page Freight System Profiles, a series of profiles for each of the key elements of the regional freight system to document their physical, operational, and market characteristics; Consultant shall solicit Metro input during preparation. Metro shall provide GIS and mapping support for this sub-task. Actions taken by Consultant to prepare Freight System Profiles must include:

4.3.1 Motor Carrier Profile

Consultant, with Metro input, shall document truck freight characteristics. Metro shall run the Regional Truck Model to assess base year (2005) and horizon year (2035) conditions. Model outputs include Average Daily Traffic/PM peak truck flows; and regional totals for average weekday truck trips, travel time, trip length, and hours of delay. Metro shall assess and report model output described above, distinguishing between heavy and medium trucks. Consultant shall report on current and future truck modal splits (in tonnage, compare to other freight modes), mix of commodities moved, intermodal characteristics, types of service (truckload, less-than-truckload, etc), over-dimensional loads, hazardous goods routes, regulatory agencies, contribution to transportation revenues, and other relevant features.

4.3.2 Freight Rail Profile

Consultant shall describe the region's freight rail network including types and locations of service, train volumes by line, origin/destination patterns, current and future modal split (tonnage), mix of commodities moved, intermodal characteristics, regulatory agencies, and other relevant features based on ODOT's *I-5 Rail Capacity Study* (2003) and the *Lower Columbia River Commodity Flow Forecast* (2002).

4.3.3 Air Cargo Profile

Consultant describe the region's air cargo operations including terminal location(s), volumes, mix of commodities moved, current and future modal split (tonnage), major carriers, origin/destination patterns, intermodal characteristics, regulatory agencies, and other relevant features based on the Port of Portland's *Aviation Master Plan* (2000) and the *Lower Columbia River Commodity Flow Forecast* (2002).

4.3.4 Marine Cargo Profile

Consultant shall describe the region's marine cargo operations including terminal locations, types of service, number and type of vessels providing regular service to regional port terminals, origin/destination patterns, current and future modal split (tonnage), mix of commodities moved, intermodal characteristics, regulatory agencies, and other relevant features based on the Port of Portland's *Marine Terminal Master Plan* (2003) and the *Lower Columbia River Commodity Flow Forecast* (2002).

4.3.5 Pipeline Profile

Consultant shall describe the region's pipeline network including proximate location of lines and terminals, origin/destination patterns, mix of commodities moved, intermodal characteristics, regulatory agencies, and other relevant features.

Sub-task 4.4, Freight Traffic Generators

Metro shall prepare Freight Traffic Generator Technical Memorandum documenting locations of major freight traffic generators and describing both the type of businesses and use of freight mode(s).

Sub-task 4.5, Draft System Conditions Technical Report

Consultant shall prepare a 15-25 page Draft System Conditions Technical Report to include the description of data sources, industry trends, shipper logistics stories, freight system profiles, and freight traffic generator characteristics. Draft System Conditions Technical Report must include both narrative and graphics to convey the conditions of the regional freight system and include Consultant deliverables 4.2a, 4.2b, and 4.3 as well as Metro deliverables 4.1 – 4.4.

Metro shall provide a single set of consolidated non-contradictory comments on the Draft System Conditions Technical Report.

Sub-task 4.6, Freight Advisory Committees Participation

Metro shall convene and participate in up to two TAC and two Task Force meetings under this task. Metro shall consult the advisory committees on the trends and freight profiles. Consultant and Metro shall prepare meeting materials reflecting their respective responsibilities under task 4. Consultant shall participate in up to one TAC and one Task Force meeting. The advisory committees shall review and comment on the draft System Conditions Technical Report.

Sub-task 4.7, Final System Conditions Technical Report

Consultant shall prepare final System Conditions Technical Report to incorporate TAC, Task Force, and Metro input on draft.

Deliverables

Metro

- 4.1 Database of Freight Data Sources
- 4.2 Industry Trends and Logistics Patterns Technical Memorandum
- 4.3a Regional Truck Model Run Outputs
- 4.3b Freight Profile GIS Maps and Graphics
- 4.4 Freight Traffic Generator Technical Memorandum
- 4.5 Review and Comment on Draft System Conditions Technical Report
- 4.6 TAC & Task Force meetings (Max. 2 each)

Contractor

- 4.1 Review and Comment on Data Sources
- 4.2a Industry Interviews (3 - 4)
- 4.2b Logistics Story
- 4.2c Review and Comment on Industry Trends and Logistics Patterns Technical Memorandum
- 4.3 Freight System Profiles
- 4.5 Draft System Conditions Technical Report
- 4.6 TAC & Task Force meetings (1 each)
- 4.7 Final System Conditions Technical Report

Schedule

Months 1 - 5

Task 5.0 - System Assessment

Objective

Develop a comprehensive assessment of the regional freight system issues, needs, and deficiencies.

Methodology

Sub-task 5.1, Issues Identification

Metro shall prepare Summary of Needs/Issues/Deficiencies, an initial summary of issues pertinent to regional freight and goods movement from data compiled in Task 3 Desired Outcomes & System Conditions and gathered through public input opportunities, identified in Task 2 - Public Participation and Technical Coordination. Some issues will be corridor specific, while others will apply region-wide.

Consultant shall provide Review and Comment (oral and/or written) on draft Summary of Needs/Issues/Deficiencies.

Sub-task 5.2, Sub-Area Needs Analysis

Metro shall prepare Sub-Area Needs Analysis Technical Memorandum. Actions taken to prepare Sub-Area Needs Analysis Technical Memorandum must include:

- 5.2.1 Metro shall develop and apply criteria, with input from Consultant and TAC in order to identify up to ten regional sub-areas centered on major freight corridors and create an aggregated Traffic Analysis Zone (TAZ) system for use in a sub-area needs analysis.
- 5.2.2 For each sub-area, Metro shall describe, using narrative and graphics as appropriate, the primary modes of freight service, the intermodal transfer points and relationship to congested corridors, the connection between the freight generators and the regional corridors, origin and destination patterns, congestion bottlenecks on the primary truck routes, infrastructure deficiencies such as weight limited bridges, major truck generators, expansion and/or relocation needs of major terminal facilities, economic development opportunities, availability of multimodal passenger transportation, and other information as deemed necessary by the PMT and Freight TAC. As a separate deliverable, Metro shall prepare illustrative TAZ Sub-Area Maps
- 5.2.3 Metro shall furnish and analyze output from RTP Base Case model and the Truck model output including color-coded volume/capacity ratio plots and origin/destination tables for base and horizon year. The Freight plan must use the same version of the model as the 2035 RTP update. The base year is 2005 and the anticipated planning horizon is 2035. As a separate deliverable, Metro shall prepare illustrative Origin/Destination Tables and Volume/Capacity Map(s).

Consultant shall provide Review and Comment (oral and/or written) on draft Sub-Area Needs Analysis Technical Memorandum.

Sub-task 5.3, Draft Solutions/Strategy Assessment

Metro shall prepare a Refined and Categorized Summary of Needs/Issues/Deficiencies and Sub Area Needs, a refinement of sub-task 5.1 list of issues, needs, and deficiencies must include additional information from sub-task 5.2 sub-area needs analysis and categorize by common characteristics.

Metro and Consultant shall prepare a series of background papers that describe implementation strategies that can inform the solutions and strategies assessment:

5.3.1, Transportation System Management and Operations

Metro shall prepare System Management and Operational Strategies Technical Memorandum documenting management and operational practices and strategies that can be employed to improve the efficiency, safety, and/or security of the freight system and assessing feasibility of application to the region and provide recommendations for further action. The evaluation of practices and strategies must consider all modes of freight.

Consultant shall provide Review and Comment (oral and/or written) on draft System Management and Operational Strategies Technical Memorandum.

5.3.2, Environmental and Neighborhood Impacts and Mitigation Strategies

Consultant shall prepare a 6-10 page Environmental and Neighborhood Impact Mitigation Strategies Technical Memorandum which addresses the impacts of freight movement on the environment and neighborhoods. Issues to be addressed must include air quality, parking, size of delivery vehicles, and safety. Strategies must consider the feasibility of freight transportation demand management (TDM) measures such as shift travel or delivery times to off-peak, truck-only lanes, tolling, empty backhaul reduction, and freight modal shifts. Strategies must also address potential for shifting passenger travel mode choices in key freight corridors.

Metro shall provide a single set of consolidated non-contradictory comments and incorporate edits into draft Neighborhood Impact Mitigation Strategies Technical Memorandum.

5.3.3, Land Use and Economic Development Strategies

Consultant shall prepare a 6-10 page Land Use and Economic Development Strategies Technical Memorandum describing the relationship between transportation and land recycling (brownfields); industrial/employment lands preservation and expansion; and the retention and attraction of businesses – focusing on the region’s growing sectors. As part of this task, Consultant, with Metro input, shall research and propose strategies to better coordinate industrial/employment land development with infrastructure needs and to leverage freight transportation investments to support the region’s economic development goals.

Metro shall provide a single set of consolidated non-contradictory comments and incorporate edits into draft Land Use and Economic Development Strategies Technical Memorandum.

5.3.4, Financing Strategies

Metro shall prepare Financing Strategies Technical Memorandum. As part of this task, Metro, with Consultant input, shall research and describe emerging practices in the financing of infrastructure for freight movement.

Consultant shall provide Review and Comment (oral and/or written) on draft Financing Strategies Technical Memorandum.

Sub-task 5.4, Solutions and Strategies Assessment

5.4.1 Using information provided in background papers, Consultant shall prepare a 4-10 page Draft Solutions and Strategies Technical Memorandum to identify and describe possible solutions/strategies for each category of issue/need/deficiency identified by Metro.

Metro shall provide a single set of consolidated non-contradictory comments on draft Solutions and Strategies Technical Memorandum.

5.4.2 Consultant shall prepare final Solutions and Strategy Technical Memorandum incorporating TAC, Task Force, and Metro input on draft Solutions and Strategy Technical Memorandum.

Sub-task 5.5, Draft System Assessment Technical Report

Consultant shall prepare a 10-20 page Draft System Assessment Technical Report to include identified issues/needs/deficiencies, sub-area analysis data and findings, and solutions/strategies assessment. System Assessment Technical Report must include both narrative and graphics sufficient to convey the needs/issues/deficiencies for the regional freight system and incorporate consultant deliverables in Task 5.3 and 5.4. and Metro deliverables in Tasks 5.1 – 5.3 Consultant shall solicit Metro input during preparation.

Metro shall provide a single set of consolidated non-contradictory comments on Draft Systems Assessment Technical Report.

Sub-task 5.6, Freight Advisory Committees Participation & JPACT & TPAC Briefings

Metro shall convene and participate in up to two TAC and two Task Force meetings under this task. TAC and Task Force shall provide input on sub-area issues identification and assessment, and the development of solutions and strategies. Consultant shall participate in up to two TAC and one Task Force meeting during this task. TAC and Task Force shall review and comment on draft Systems Assessment Technical Report.

Metro shall give a project briefing on desired outcomes, system conditions, and system assessment to TPAC, JPACT and Metro Council. Consultant shall participate in JPACT and Metro Council briefing.

Sub-task 5.7, Final System Assessment Technical Report

Consultant shall prepare final System Assessment Technical Report to incorporate TAC, Task Force and Metro input on draft.

Deliverables

Metro

- 5.1 Summary of Needs/Issues/Deficiencies
- 5.2.a Sub-Area Needs Analysis Technical Memorandum
- 5.2.b TAZ Sub-Area Maps
- 5.2.c Origin/Destination Tables and Volume/Capacity Map(s)
- 5.3a Refined and Categorized Summary of Needs/Issues/Deficiencies and Sub-Area Needs
- 5.3b System Management and Operations Strategies Technical Memorandum
- 5.3c Review and Comment on Environmental and Neighborhood Impact Mitigation Strategies Technical Memorandum
- 5.3d Review and Comment on Land Use and Economic Development Strategies Technical Memorandum
- 5.3e Financing Strategies Technical Memorandum
- 5.3f Review and Comment on Solutions and Strategies Technical Memorandum
- 5.5 Review and Comment on Draft System Assessment Technical Report
- 5.6a TAC meetings (Max. 2)
- 5.6.b Task Force meetings (Max. 2)
- 5.6c TPAC, JPACT & Metro Council Briefings

Contractor

- 5.1 Review and Comment on Summary of Needs/Issues/Deficiencies
- 5.2 Review and Comment on draft Sub-Area Needs Analysis Technical Memorandum
- 5.3a Environmental and Neighborhood Impact Mitigation Strategies Technical Memorandum
- 5.3b Land Use and Economic Development Strategies Technical Memorandum
- 5.3c Review and Comment on Financing Strategies Technical Memorandum
- 5.3d Draft Solutions and Strategies Technical Memorandum
- 5.4 Final Solutions and Strategies Technical Memorandum
- 5.5 Draft System Assessment Technical Report
- 5.6a TAC meeting (Max. 2)
- 5.6b Task Force meeting (1)
- 5.6c JPACT and Metro Council Briefings (1 each)
- 5.7 Final System Assessment Technical Report

Schedule

Months 3 - 7

Task 6.0 - Policy Evaluation

Objective

Review and make recommendations on refinements to the regional freight system policies and network that respond to the desired outcomes.

Methodology

Sub-task 6.1, Regional Freight Policy Evaluation

Metro shall prepare Draft Regional Freight Policy Evaluation, an evaluation of existing RTP goods movement-related policies and objectives against desired outcomes and Task 5 system assessment to identify key policy gaps and inconsistencies and to ensure consistency with other local, state, and federal policies and plans. Metro shall propose revisions to existing policy and/or objective language and craft new language that will be forwarded as recommendations to the 2035 RTP update process. Metro shall solicit Consultant input during preparation.

Consultant shall provide Review and Comment (oral and/or written) on draft Regional Freight Policy Evaluation.

Sub-task 6.2, Regional Freight Functional Classification System and National Highway System (NHS) Network Review

Metro shall prepare Draft Regional Freight Functional Classification System and NHS Network Review. As part of this task, applying Task 4 - System Conditions and Task - 5 System Assessment data and findings, Metro shall review and propose revisions to the current RTP freight functional classification system, establishing assessment criteria and applying it to identify network changes. Review includes the identification of recommended updates to the federal NHS designations.

Consultant shall provide Review and Comment (oral and/or written) on Draft Regional Freight Functional Classification System and NHS Network Review.

Sub-task 6.3, Draft Regional Freight Policy and Network Recommendations Technical Report

Metro shall prepare Draft Regional Freight Policy and Network Recommendations Technical Report with recommendations for revisions and additions to the RTP policy language, the freight functional classification system map, and the NHS designations.

Sub-task 6.4, Freight Advisory Committees Participation & Briefings

Metro shall convene and participate in up to two TAC and one Task Force meetings under this task. TAC and Task Force shall provide input on policy evaluation, proposed policies revision, and the regional and NHS network changes. TAC and Task Force shall review and comment on the draft Regional Freight Policy and Network Recommendations Technical Report.

Metro shall brief TPAC and JPACT on the freight policy evaluation and proposed recommendations, regional and NHS freight network assessment, and street design policy and proposed revisions to the *Creating Livable Streets* design guide.

Sub-task 6.5, Final Regional Freight Policy and Network Recommendations Technical Report

Metro shall prepare final Regional Freight Policy and Network Recommendations Technical Report to incorporate TAC, Task Force, and Consultant input on draft.

Deliverables

Metro

- 6.1 Draft Regional Freight Policy Evaluation
- 6.2 Draft Regional Freight Functional Classification System and NHS Network Review
- 6.3 Draft Regional Freight Policy and Network Recommendations Technical Report
- 6.4a TAC (Max. 2)
- 6.4b Task Force meetings (Max. 1)
- 6.4c TPAC and JPACT briefings
- 6.5 Final Regional Freight Policy and Network Recommendations Technical Report

Contractor

- 6.1 Review of and Comment on Draft Regional Freight Policy Evaluation
- 6.2 Review of and Comment on Draft Regional Freight Functional Classification System and NHS Network Review

Schedule

Months 7 – 10

Task 7.0 - Freight System Infrastructure Improvements

Objective

Use the desired outcomes as a guide for identifying and prioritizing infrastructure improvements to establish a recommended freight projects list that will be forwarded to the 2035 RTP Update process.

Methodology

Sub-task 7.1, Freight Project Criteria and Identification

Metro shall prepare Freight Project Criteria and Identification. As part of this task, Metro shall develop criteria for identifying a subset of “freight” projects from the full list of projects in the existing RTP 2025 Illustrative System. Metro shall apply the freight project identification criteria to identify a set of “freight” infrastructure projects that should address all freight modes and intelligent transportation system infrastructure. Metro shall solicit Consultant input during preparation.

Sub-task 7.2, Draft System Improvements Recommendations Technical Report

Consultant shall prepare a 10-20 page Draft System Improvements Recommendations Technical Report, which incorporates “Freight Project Criteria and Identification”, “Freight Project Technical Assessment”, and “Recommended Projects List”, i.e., describing the project identification and assessment process, prioritization criteria, and recommended freight projects list in relative priority order.

7.2.1 Freight Project Technical Assessment

Consultant shall prepare Freight Project Technical Assessment to assess the freight projects list using Task 4 - System Assessment data to identify project list gaps, additional needed improvements, refinements to existing projects, and/or unnecessary projects by sub-area.

Consultant shall propose solutions to address assessment findings and create Interim Freight Projects List as a separate deliverable.

As part of this task, and as a separate deliverable, Metro shall organize and Consultant shall facilitate Street Design Working Group Meeting to review new or amended projects for potential impacts on other modes including rail, transit, bicycle, and pedestrian.

Agency Rail staff shall review any proposed projects within 500' of a railroad.

7.2.2 Recommended Projects List

Consultant shall prepare Recommended Freight Projects List an identification of project prioritization criteria based on the desired outcomes identified in Task 4 - System Conditions and advisory committee input. The prioritization criteria must be reviewed for consistency with the outcomes identified in the 2035 RTP outcomes. Consultant shall provide "order of magnitude" cost estimates for any new or substantially refined projects.

Metro shall prepare Map of Recommended Freight Projects.

As part of this task, and as a Subtask 7.3 deliverable, using the sub-task 7.2.1 interim freight projects list, Consultant shall coordinate with Metro, TAC, and Freight Task Force to apply prioritization criteria to select a twenty-year list of recommended freight projects and establish relative timing of priority to be advanced to the 2035 RTP update process.

Note: The 2035 RTP projects, including the recommended freight projects, will be modeled for system performance and air quality as part of the RTP System Analysis task in the Spring/Summer 2007, outside the scope of the TGM project. Refinements to the freight project list will occur as part of the final plan development in the post TGM phase.

Metro shall provide a single set of consolidated non-contradictory comments on Draft System Improvements Recommendations Technical Report.

Sub-task 7.3, Freight Advisory Committees Participation & Briefing

Metro shall convene and participate in up to two TAC and one Task Force meetings under this task. Consultant shall participate in up to two TAC and one Task Force meeting during this task. TAC and Task Force will provide input on the freight project identification criteria, technical assessment of improvement list, prioritization criteria and application, and recommended projects list. TAC and Task Force shall review and comment on draft System Improvements Recommendation Technical Report developed in subtask 7.2

Metro shall brief TPAC on the process and identification of freight projects for the region.

Sub-task 7.4, Final System Improvements Recommendations Technical Report

Consultant shall prepare final System Improvements Recommendations Technical Report to incorporate TAC, Task Force, and Metro input on draft.

Deliverables

Metro

- 7.1 Freight Project Criteria and Identification
- 7.2a Street Design Working Group meeting (Max. 1)
- 7.2b Map of Recommended Freight Projects
- 7.2c Review and Comment on Draft System Improvements Recommendation Technical Report
- 7.3a TAC meetings (Max. 2)
- 7.3b Task Force meetings (1)
- 7.3c TPAC Briefing

Consultant

- 7.1. Freight Project Technical Assessment
- 7.2 Draft System Improvements Recommendations Technical Report including Freight Project Criteria and Identification, Freight Project Technical Assessment, and Recommended Projects List
- 7.3a TAC meetings (Max. 2)
- 7.3b Task Force meetings (1 each)
- 7.4 Final System Improvements Recommendations Technical Report

Schedule

Months 7 - 10

Task 8.0 - Implementation Strategies

Objective

To identify a set of recommended practices and strategies that can be implemented to address freight-related needs and issues in the region.

Methodology

Sub-task 8.1, Draft Implementation Strategies Technical Report

Using information developed in Task 5, Metro shall evaluate and recommend the regional application of practices and strategies for System Management and Operations (task 5.3.1), for Mitigation of Environmental and Neighborhood Impacts (task 5.3.2), for Coordination of Land Use and Economic Development (task 5.3.3.), and for Financing freight infrastructure improvements (task 5.3.4). Metro shall prepare a Draft Implementation Strategies Technical Report that incorporates the evaluation and recommendations.

Consultant shall provide Review and Comment (oral and/or written) on Draft Implementation Strategies Technical Report.

The TAC and Task Force shall provide input on determining recommended implementation strategies. TAC and Task Force shall review and comment on the draft Implementations Strategies Technical Report. TAC and Task Force deliberation on the Draft Implementation Strategies must take place during meetings scheduled under Task 9, Street Design.

Sub-task 8.2, Final Implementation Strategies Technical Report

Metro shall prepare final Implementation Strategies Technical Report to incorporate TAC, Task Force and Consultant input on draft.

Deliverables

Metro

- 8.1 Draft Implementation Strategies Technical Report
- 8.2. Final Implementation Strategies Technical Report

Consultant

- 8.1 Review and Comment on Draft Implementation Strategies Technical Report

Schedule

Months 9–11

Task 9.0 - Trucks and Street Design

Objective

Develop an understanding of the physical and operational characteristics of trucks in order to better plan for their presence in different land use settings. Apply this understanding to make recommendations for revisions to Metro’s *Creating Livable Streets* design guide.

Methodology

Sub-task 9.1, Draft Trucks and Street Design Recommendations Technical Report

Consultant shall prepare a 6-12 page Draft Trucks and Street Design Recommendations Technical Report, incorporating analysis and presentation of “Physical and Operational Characteristics of Trucks” and “Street Design Policy and Guide Review”, with recommendations, to include the description of physical and operational characteristics, assessment findings, and recommendations for revisions to street design policy and guidelines. Technical Report must include narrative and graphic illustrations (up to four) to clearly represent the recommendations.

9.1.1, Physical and Operational Characteristics of Trucks

Building on work completed by City of Portland, Consultant shall document truck characteristics including the variation in physical dimensions, uses, operational needs, and other relevant elements identified by Consultant. Consultant shall identify the typical truck types used in different land use settings and describe the roadway design challenges.

9.1.2, Street Design Policy and Guide Review

Consultant, with assistance from Metro, shall review the current RTP street design policy and the *Creating Livable Streets* guidelines then assess and document where truck design needs should be addressed. Using Street Design Working Group input, Consultant shall propose

recommended narrative and graphics revisions, such as street and intersection cross-section illustrations, to the Street Design policy and the guidelines.

Sub-task 9.2, Street Design Working Group Participation

Metro and Consultant shall convene and participate in up to two Street Design Working Group meetings under this task. Street Design Working Group provides input on the truck considerations in street design policy and guidelines and makes recommendations on design policy and guideline revisions.

Sub-task 9.3, Freight Advisory Committees Participation

Metro and Consultant shall convene and participate in one TAC and one Task Force meetings under this task. TAC and Task Force shall review and provide input on truck considerations in street design policy and guidelines, and the revisions recommended by the Street Design Working Group. TAC and Task Force shall review and comment on the draft Truck and Street Design Recommendations Technical Report for this task.

Sub-task 9.4, Trucks and Street Design Recommendations Technical Report

Consultant shall prepare final Trucks and Street Design Recommendations Technical Report to incorporate TAC, Task Force and Metro input on draft based on a single set of consolidated non-contradictory comments.

Deliverables

Metro

- 9.1 Review and Comment on Trucks and Street Design Recommendations Technical Report
- 9.2 Street Design Working Group meeting (2)
- 9.3 TAC & Task Force meeting (1 each)

Contractor

- 9.1 Draft Truck and Street Design Technical Report
- 9.2 Street Design Working Group meeting (2)
- 9.3 TAC & Task Force meeting (1 each)
- 9.4 Final Truck and Street Design Recommendations Technical Report

Schedule

Months 9-11

Task 10.0 - Recommendations and Documentation

Objective

Provide a comprehensive report on the assessment of the regional freight system including the community challenges and opportunities, and recommendations for policy, infrastructure improvements, and implementation strategies. Recommendations must be incorporated into the 2035 RTP update and adoption process.

Methodology

Sub-task 10.1, Policy, Project, and Implementation Recommendations Finalization

Metro shall prepare Final Regional Freight Policy, Project, and Implementation Recommendations, a set of policy, infrastructure, and implementation strategy recommendations and apply a relative timeframe for taking action – short-term, mid-term, and long-term.

Consultant shall provide Review and Comment (oral and/or written) on Final Regional Freight Policy, Project, and Implementation Recommendations. As part of this task, and as a separate deliverable, Metro shall consult with TAC and Task Force to refine recommendations, convening up to two meetings for each advisory committee. Metro shall brief TPAC, JPACT, and Metro Council on draft recommendations. Consultant shall participate in the JPACT and Metro Council briefings.

Sub-task 10.2, Final Report Preparation

Metro shall prepare Final Report on Metro-Region Plan for Freight and Goods Movement incorporating on all the deliverables produced in the course of Project. Final Report must include summaries of the technical memoranda and reports and recommendations that will be carried forward into the 2035 RTP Update and freight plan document. Final Report must include narrative and graphics sufficient to convey the state of the regional freight system and recommendations for improvements.

Consultant shall provide Review and Comment (oral and/or written) on Final Report on Metro-Region Plan for Freight and Goods Movement.

Deliverables

Metro

- 10.1a Final Regional Freight Policy, Project, and Implementation Recommendations
- 10.1b TAC & Task Force meeting (Max. 2 each)
- 10.1c TPAC, JPACT & Metro Council briefings (1 each)
- 10.2 Final Report on Metro-Region Plan for Freight and Goods Movement

Contractor

- 10.1 Review and Comment on Final Regional Freight Policy, Project, and Implementation Recommendations
- 10.1b JPACT & Metro Council briefings (1 each)
- 10.2 Review and Comment on Final Report on Metro-Region Plan for Freight and Goods Movement

Schedule

Months 11 - 13

BUDGET AND SCHEDULE

Tasks	Metro	Schedule
1. Project Management	\$10,000	Months 01 - 13
2. Public Participation/Technical Coordination	\$42,000	Months 01 - 13
3. Desired Outcomes	\$2,000	Months 01 - 03
4. System Conditions	\$29,000	Months 01 - 05
5. System Assessment	\$17,000	Months 03 - 07
6. Policy Evaluation	\$13,000	Months 07 - 10
7. Freight System Improvements	\$8,000	Months 07 - 10
8. Implementation Strategies	\$2,000	Months 09 - 11
9. Trucks And Street Design	\$5,000	Months 09 - 11
10. Recommendations And Documentation	\$12,000	Months 11 - 13
Task Total	\$140,000	
Materials	\$5,000	
Grand Total	\$145,000	

Budget Summary

Total Project Cost:	\$ 235,000
TGM Grant Amount	\$ 155,000
Consultant Grant Amount	\$ 90,000
Metro Grant Amount	\$ 65,000
Metro Match	\$ 80,000