

# A G E N D A

600 NORTHEAST GRAND AVENUE PORTLAND, OREGON 97232 2736



**METRO**

TEL 503-797-1916 FAX 503-797-1930

**MEETING: TRANSPORTATION POLICY ALTERNATIVES COMMITTEE**

**DATE: June 29, 2007**

**TIME: 9:30 A.M.**

**PLACE: Metro Regional Center, 370 A/B**

9:30 AM	<b>1.</b>	Call to Order and Declaration of a Quorum	Andy Cotugno
9:30 AM	<b>2.</b>	Citizen communications to TPAC on non-agenda items	Andy Cotugno
9:35 AM	<b>3.</b>	Approval of TPAC minutes for June 1, 2007	Andy Cotugno
9:40 AM	<b>4.</b>	Future Agenda Items <ul style="list-style-type: none"><li>• Willamette River Bridges (anytime)</li><li>• Regional Rail System</li><li>• RTO 05-06 Evaluation Report &amp; Evaluation Program Update</li><li>• RTP Systems Analysis &amp; Policy Framework Refinements</li></ul>	Andy Cotugno
9:45 AM	<b>5</b>	# Lake Oswego Transit AA Evaluation Results & LPA Process	Ross Roberts
10:05 AM	<b>5.1</b>	I-5/ 99W Connector Update – Range of Alternatives	Scott Richman
10:25 AM	<b>5.2</b>	* 2008 – 2011 MTIP: Air Quality Conformity	Mark Turpel & Ted Leybold
10:35 AM	<b>5.3</b>	* 2006-2009 MTIP Amendment & Air Quality Conformity	Mark Turpel & Ted Leybold
10:40 AM	<b>5.4</b>	Portland Primary Transit Network	Paul Smith
10:50 AM	<b>5.5</b>	* 2035 RTP Update <ul style="list-style-type: none"><li>* Investment Solicitation Process – Status Report</li><li>* RTP Performance Measures - Discussion</li></ul>	Kim Ellis
12:00 AM	<b>6.</b>	ADJOURN	Andy Cotugno

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- \* Material available electronically.  
\*\* Material to be emailed at a later date.  
# Material provided at meeting.  
All material will be available at the meeting.

Please call 503-797-1916 for a paper copy

TRANSPORTATION POLICY ALTERNATIVES COMMITTEE

Minutes

June 1, 2007 – Meeting

Metro Regional Center – Council Chambers

**MEMBERS PRESENT**

Elissa Gertler  
Karen Schilling  
Nancy Kraushaar  
Mike McKillip  
Paul Smith  
Frank Angelo  
Scott Bricker  
Sorin Garber  
John Reinhold  
Phil Selinger  
Rian Windsheimer  
Satvinder Sandu

**AFFLIATION**

Clackamas County  
Multnomah County  
City of Oregon City, representing the Cities of Clackamas County  
City of Tualatin, representing the Cities of Washington County  
City of Portland  
Citizen  
Citizen  
Citizen  
Citizen  
TriMet  
ODOT  
FHWA

**MEMBERS ABSENT**

Brent Curtis  
Ron Papsdorf  
Greg DiLoreto  
Sreya Sarkar  
Dave Nordberg  
Susie Lahsene  
Dean Lookingbill  
Jack Burkman  
John Hoefs

**AFFLIATION**

Washington County  
City of Gresham  
Citizen  
Citizen  
DEQ  
Port of Portland  
SW Washington RTC  
Washington DOT  
C-TRAN

**ALTERNATES PRESENT**

Andy Back  
Danielle Cowan  
Margaret Middleton  
Marianne Fitzgerald  
Robin McCaffrey

**AFFLIATION**

Washington County  
City of Wilsonville  
City of Beaverton  
DEQ  
Port of Portland

**GUESTS PRESENT**

Lawrence Odell  
Derek Robbins

**AFFILIATION**

Washington County  
Forest Grove

**STAFF**

Andy Cotugno, Kim Ellis, Ted Leybold, Josh Naramore, John Mermin, Jon Makler, Joyce Felton, Richard Brandman, Jamie Snook, Pat Emmerson

**1. CALL TO ORDER, DECLARATION OF A QUORUM**

Chair Andy Cotugno declared a quorum and called the meeting to order at 9:36 a.m.

**2. CITIZEN COMMUNICATIONS TO TPAC ON NON-AGENDA ITEMS**

There were none.

**3. APPROVAL OF TPAC MINUTES FOR APRIL 27, 2007**

**MOTION:**

Phil Selinger moved, seconded by Karen Schilling, to approve the April 27<sup>th</sup>, 2007 meeting minutes.

**VOTE:**

The motion passed.

**4. FUTURE AGENDA ITEMS**

- Willamette River Bridges
- Regional Rail System
- I-5/ 99W Connector Update
- RTO 05-06 Evaluation Report & Eval Procedure
- LO Transit AA Evaluation Results & LPA Process RTP Performance Measures/ Implementation Strategies

There was no discussion regarding the future agenda items.

**5. STREETCAR AND DEVELOPMENT IMPACTS**

Mr. Richard Brandman appeared before TPAC and gave a PowerPoint presentation on the streetcar and its relationship to and impact on development. He also identified a variety of techniques used to produce streetcar projects and briefly explained the short and long term planning benefits these projects provide urban planning and development.

Key points of presentation:

1. Increasing national interest in streetcar projects; (e.g. 40 cities in the United States are pursuing streetcar projects)
2. Small Starts, a federal program similar to New Starts, was created to help provide funding for such projects.
3. General disconnect with how the program is being administered in relationship to its original purpose; federal transit administration (FTA) is making it harder to fund streetcar programs.
4. Streetcars play a role in urban renewal by increasing development within the close proximity to such infrastructures.
5. 38 % of streetcar project funding (Portland streetcar project) is coming from development money.
6. Streetcars do not save travel time, which is a federal funding factor; however they attract more development and put more trips on transit.
7. Streetcar projects receive a higher level of support from the development community than bus service, and help promote alternative modes of transportation (e.g. walking, biking, etc.)
8. TriMet's annual rides per resident compared to similar sized transit districts across the nation shows that Portland is number one.

Mr. Sorin Garber, Citizen, questioned what those opposed to the streetcar project would propose as alternative modes of transit. Mr. Brandman responded by explaining that BRT, bus rapid transit systems, are alternatives to light rail and fine in certain applications for a lower cost project, lower capacity and

lower volume. However, BRTs cannot carry the volume of people needed in the future, and there is no indication that developers want to be located near or associated with bus-lines.

Mr. John Reinhold, Citizen, mentioned that streetcars should be a better alternative mode of transit than BRT because it is not exclusively tied to fossil fuels. Mr. Brandman elaborated on Mr. Reinhold's comment by explaining that although a positive for the environment, these factors have been eliminated from the federal review process when considering funding streetcar projects.

Ms. Elissa Gertler, Clackamas County, wanted to know how TPAC can take the streetcar project to the next step and get a wider regional application. More specifically she was inquiring about the proposed streetcar project for Lake Oswego and light rail for Clackamas County and what are some of the conclusions that can be drawn out of streetcar development to development in centers. Mr. Brandman responded by saying that there is a combination of factors to be taken into consideration. First, the local community will have to approve the project, second the market conditions and feasibility analyses will have to prove it economically feasible, and finally the demand must be present. Mr. Brandman also noted that this process for the LO streetcar proposal should be complete in the next couple of weeks. More specifically the analysis will focus on the LO alignments and Johns Landing, which could be applied to any project in any center, but with a varying formula for various conditions.

Mr. Frank Angelo, Citizen, asked whether it was feasible to increase the contribution costs the development community pays in taxes and fees. Mr. Brandman answered Mr. Angelo by explaining that in the short-term developers and the development community benefit from streetcar programs; however the bigger picture is that streetcar projects change how communities are built, in terms of controlling and predicting density in addition to providing alternative modes of transportation to accommodate higher density.

Mr. Andy Cotugno, Metro, commented that with every new circumstance and market condition a new precedent is established. For example based on today's conditions and development an eastside streetcar will not be as successful as the Pearl district's and Clackamas less so.

Mr. Phil Selinger, TriMet, requested for there to be a placeholder in the RTP for streetcar projects at all of the regional centers. Even though the streetcar is development oriented, one challenge is to make sure that it works with the rest of the system. Building the streetcar is a one-time capital loss with on-going operating cost and it is a good circulator system for building centers.

Mr. Scott Bricker, Citizen, commented that he did not agree with the current rapid transit plans. He questioned whether enough analysis has been done on the BRT to negate it as a reasonable and feasible mode of transportation in the region. Mr. Bricker expressed that there is a lot of opportunity with BRT in regards to cost and asked why the FTA would support a more expensive project. Mr. Brandman responded by saying that it has been recognized that BRT is a lot less expensive than a light rail or streetcar to build; however one must analyze the long-term benefits of the money spent, including the on-going operating cost and the ridership in addition to the development potential. He also noted that the Right-of-Way for the proposed LO streetcar project is already owned, and clarified that the cost of the project is not \$200 million.

Mr. Cotugno redirected the conversation by stating that the broader challenge is to communicate the long-term benefits to the public. Streetcar projects have the potential to promote greater use in communities, schools, parking garages, help to put in parks and greenways. One has to ask what is the project's function within the community in the future and how will it help Metro reach its concept plan goals down the road.

Mr. Brandman concluded by saying that the point of his streetcar presentation was to not only inform the Metro community of the long term benefits for development and centers building; but more importantly to educate the federal government of the value of streetcar programs, and attempt to change the current management direction and review process of streetcar programs by federal funding programs.

## **5.1 TIP Amendment and Air Quality Consultation (Ted Leybold)**

Mr. Ted Leybold, Metro, appeared before TPAC and presented a project amendment for the 2006-09 TIP. The amendment called for the addition of a right turn lane for the Marine drive extension project near 257<sup>th</sup> on I-84 in Troutdale. Mr. Leybold explained that this amendment project is necessary to address the short-term traffic needs; instead of performing the Marine drive project at this time a turn lane will be added. The amendment adds this project to the TIP for 2008 and takes money away from the existing earmarked project. Regional agency partners have agreed that this is an exempt air quality project and can be added without an air quality analysis. The project amendment was presented before TPAC prior to this date.

Mr. Rian Windsheimer, Region 1 ODOT, added that this project amendment is only a short-term fix. ODOT is still working on the long-term solution.

### **MOTION:**

Mr. Frank Angelo, Citizen, moved, seconded by Ms. Karen Schilling, Multnomah County, to approve the 2006-019 TIP amendment to add the "I-84 right turn lane at 257<sup>th</sup>".

### **VOTE:**

The motion passed without objection.

## **5.2 RTP STATUS REPORT**

### **• Solicitation Issues and Process Next Steps**

Ms. Kim Ellis, Metro, updated TPAC on the RTP solicitation process and next steps. She introduced a memo to TPAC to explain the solicitation process and how the project has progressed since the acceptance of the policy framework. Ms. Ellis' memo addressed the questions and concerns about the solicitation process; including the unknowns and ambiguity it may have generated.

Key points of memo:

1. May 10<sup>th</sup> JPACT recommended an extension of the RTP state timeline component. Federal component deadline: Dec. 2007. Second step built in to allow for more time to be spent on the state component: deadline June 2008.
2. Timeline of sequencing: details of meetings and staff work for federal RTP deadline, details and dates for meetings and hearings for federal RTP, air quality analysis deadline of March 2008, adoption deadline of June 2008.
3. Clarified components of RTP: described both state and federal requirements.
4. Clarified level of analysis and scope of staffs' work.
5. Discussed corridor refinement plans
6. Discussed determination of necessity of projects

The question was asked whether project placeholders would be in the federal or state components of the RTP. Mr. Cotugno responded by saying that given the limits of the financially constrained federal RTP, placeholder projects would be a function of the state RTP.

If projects in the state RTP are to change in the future, then the federal RTP will have to be amended. This process would not be exempt from air quality studies because the air emissions standards in the federal RTP are based on a model of the number and size of projects.

Metro staff plan to identify a range of years and projects then perform a conformity analysis to determine what projects will be completed, and in what sequence over time. A 200% percent list of projects is being compiled and will be used as a platform to model and evaluate what is feasible for the state and federal RTP. The RTP is not soliciting projects outside of the UGB. All rural roads and connections to areas inside the UGB are the responsibility of local jurisdictions. Metro staff plans to have urban reserve placeholders

included by the next RTP update. The current RTP does not account for Measure 37 claims. SDC fees are not accounted for in the financial portion of the RTP in most of the newly added areas of the UGB.

Mr. Windsheimer explained that ODOT plans to respond to the submittals from the mobility workshop by compiling the results and identifying potential projects and their associated costs. ODOT plans to have a draft by Monday, June 4<sup>th</sup>, 2007. Phil Selinger, TriMet, followed by saying that transit has listed a high capacity connection for Hwy 26 as a potential project; in addition to extensions to Clackamas and Tigard. TriMet plans to have something on the agenda next month.

Mr. Paul Smith, City of Portland, requested Metro staff to provide a base model or a table of the metro region's base year population and employment; subtotaled by each jurisdiction (1/3 living in current city limits of Multnomah County) from 2005-2035 of the Metro region. In addition the City would like to request an analysis of model's performance. Ms. Ellis agreed to provide materials for Mr. Smith's request.

Ms. Karen Schilling, Multnomah County, mentioned Commissioner Maria Rojo de Steffey's letter to JPACT on May 10<sup>th</sup>, 2007 regarding the bridges and mobility issues, to be forwarded to TPAC. She noted that the County has had this item on the table for quite some time and wanted to know how TPAC was going to proceed. Ms. Ellis responded by saying that Mr. Cotugno's finance work lists the bridge category as a separate issue and Mr. Steve Siegel would provide an updated financial forecast memo at a later time.

- **Finance Issues and Choices**

Mr. Andy Cotugno addressed the questions related to RTP finance and said that he would bring any further questions back to JPACT. Mr. Cotugno also explained that the state required RTP will need to meet the land-use plan and the projects included in the RTP will have to have a financial strategy. Mr. Cotugno referred to a PowerPoint presentation/ handout during his discussion (included for the record).

Mr. Cotugno expressed a need for locating and pursuing new sources of revenue to support the RTP. Vehicle registration fees, gas taxes and truck fees alone cannot fund the state required RTP. He suggested evaluating and analyzing resources available at the local level, and self-help components. Metro staff will present the RTP finance issues and choices to MPAC and then call for action at JPACT.

It was suggested that bond measures be used, since these types of financing have worked in the past at the local level. An increase in gas tax was also suggested, but discounted by the empirical evidence that proves they do not work; therefore the idea should be abandoned. Road tolls were also suggested as a way to generate new revenue and a consulting company is under contract with ODOT to research the development of such a system. The question was raised as to whether or not the region should pursue a regional ballot measure. Mr. Cotugno suggested this discussion to begin immediately. Ms. Gertler added that TPAC should identify financing models and build on the ones that are successful and abort the ones that have been ineffective.

Mr. Cotugno concluded the discussion by suggesting that the conversation continue with each districts' respective JPACT member.

## **6 ADJOURN**

Chair Cotugno adjourned the meeting at 11:59 a.m.

\*Material available electronically.

\*\*Due to technical difficulties there is no audio recording available for this meeting.

ATTACHMENTS TO THE PUBLIC RECORD FOR JUNE 1, 2007

The following have been included as part of the official public record:

ITEM	TOPIC	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENTNO.
	Agenda	06/01/07	Meeting Agenda	060107t-01
3.0	Minutes	04/27/07	TPAC Meeting Minutes	060107t-02
5.0	Presentation	06/01/07	Presentation on Portland Streetcar: What's Next? – Richard Brandman	060107t-03
5.1	Memo	05/23/07	From Ted Leybold to TPAC and interested parties: TIP Amendment to the Troutdale/Marine Drive Extension Project	060107t-04
5.1	Maps	N/A	ODOT Maps: ODOT Region 1 STIP Project Location & STIP Project Vicinity	060107t-05
5.2	Presentation	05/24/07	Financially Constrained RTP	060107t-06
5.2	Memo	05/31/07	2035 Regional Transportation Plan – Process Update	060107t-07
5.2	Handout	05/23/07	Transportation Finance Strategy Considerations and Choices	060107y-08
5.2	Handout	N/A	Oregon Business Plan Transportation Funding Campaign (DRAFT)	060107t-09

## STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 07-3829, FOR THE PURPOSE OF AMENDING THE 2006-09 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD THE CORNELL ROAD AND SCIENCE PARK DRIVE/143RD INTERSECTION PROJECT AND THE HALL BOULEVARD AND HIGHWAY 99W INTERSECTION PROJECT

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Date: June 25, 2007

Prepared by: Ted Leybold

### BACKGROUND

The Oregon Department of Transportation (ODOT), in conjunction with the Oregon Economic Development Department has awarded Immediate Opportunity Funds (IOF) to Washington County for the Cornell Road: Science Park Drive and 143<sup>rd</sup> Avenue intersections project. ODOT has also awarded funding to Washington County for the Hall Boulevard and Highway 99W intersection project near downtown Tigard. To be eligible to receive these funds, the projects must be included in the Metropolitan and State Transportation Improvement Programs (TIP).

To be included in the TIP, the projects must be consistent with the Regional Transportation Plan, fiscal constraint of the TIP must be maintained, and air quality conformity of the TIP as amended with the new projects must be established.

The projects are included in and consistent with the Regional Transportation Plan. The funding committed to the projects represents new funding from those used to establish fiscal constraint of the TIP. Therefore, the additional costs associated with including the projects in the TIP is offset by these new revenues and fiscal constraint of the TIP is maintained.

Air quality conformity must be established prior to inclusion in the TIP. Air quality conformity analysis has been submitted to the state and federal air quality agencies and TPAC for consultation. Results from the consultation are expected by July 9<sup>th</sup> unless substantial comments require additional time to address.

This resolution would approve amending the 2006-09 Metropolitan Transportation Improvement Program to add the Cornell Road and Science Park Drive/143<sup>rd</sup> intersection project and the Hall Boulevard and Highway 99W intersection project.

### ANALYSIS/INFORMATION

1. **Known Opposition** None known at this time.
2. **Legal Antecedents** Amends the 2006-09 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 05-3606 on August 18, 2005 (For the Purpose of Approving the 2006-09 Metropolitan Transportation Improvement Program for the Portland Metropolitan Area).
3. **Anticipated Effects** Adoption of this resolution will make available transportation funding to Washington County for the Cornell Road and Science Park Drive/143<sup>rd</sup> intersection project and the Hall Boulevard and Highway 99W intersection project.
4. **Budget Impacts** None.

### RECOMMENDED ACTION

Approve Metro Resolution No. 07-3829.

M E M O R A N D U M

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736  
TEL 503 797 1700 | FAX 503 797 1794



**METRO**

DATE: June 25, 2007  
TO: Air Quality Consultation Interested Parties  
FROM: Ted Leybold: MTIP Manager  
SUBJECT: TIP Amendment to add the Hall Boulevard at Highway 99W intersection project.

\* \* \* \* \*

Project: OR99W: Pacific Hwy West Intersection @ Hall Blvd  
ODOT Key #: 15473  
RTP Project #: 6056

Requested Action: Concurrence that the OR99W: Pacific Hwy West Intersection @ Hall Blvd project is not a regionally significant project for the purposes of air quality analysis.

Background: This project proposes to add a lane to Highway 99W northeast bound at the intersection to allow right turns to Hall Boulevard southeast bound. Channelization (curb and striping) work will also formalize a right turn lane from Hall Boulevard southeast bound to Highway 99W southwest bound (the width of the roadway at the intersection currently allows this movement by vehicles but there is no formal designation of the lane). Signal improvements and access management will also be employed at the intersection to improve safety.

Hall Road is located near downtown Tigard and is designated a minor arterial north of Highway 99W but has no regional street designation south of Highway 99W in the Regional Transportation Plan (RTP). Highway 99W is designated a principal arterial in the RTP.

Federal air quality regulations (CFR 93.105) require consultation to determine which minor arterials and other transportation projects should be considered

“regionally significant” for the purposes of regional emissions analysis (in addition to principal arterials or higher and fixed-guideway systems).

It is Metro staff position that a project of this scope is not of regional significance. While the construction of or the addition of general purpose travel lanes to an arterial would be regionally significant, the addition of two vehicle right turn lanes at an intersection would not significantly affect the vehicle capacity of the facility in any way that will result in a measurable impact to the regional emissions analysis.

Therefore, Metro staff proposes the amended project status is in conformity with the State Implementation Plan for air quality.

State and Federal agency consultation comments are due to Metro staff by 5:00 PM, July 6th. TPAC concurrence on the draft staff finding of conformance with the State Implementation Plan for air quality may be adopted contingent on refinements made in response to these agency comments.

## TPAC Project Initiation Briefing – June 29, 2007

### City of Portland Primary Transit Network (PTN): *Corridor and Connection Identification Project*

#### **What is the Project Purpose?**

The goal of this project is for the Portland Office of Transportation (PDOT) and its partner agencies to define where future transit system and land use infrastructure investments should be made within the City Limits of Portland. Specific outcomes of the project include:

- Identification of high demand transit corridors and connections in the City of Portland;
- Tools and analyses for prioritizing transit investments including among others: ridership demand, potential for land development, potential for capital financing, and compatibility with roadway and right-of-way characteristics;
- Identification of “emerging corridors” where streetcar or more intensive transit investment could be critical in influencing land use development and/or local financing options may be available;
- A comprehensive (not exclusive) list of potential corridors where future streetcar or other intermediate- or high-capacity transit investments should be considered. This list will be narrowed and prioritized through evaluation in the City of Portland Streetcar System Plan and other local and regional efforts.

#### **What is the Primary Transit Network (PTN)?**

The PTN concept was developed in 1997 in support of the Regional Transportation Plan Update and the Region 2040 land use plan, to identify corridors where Tri-Met should concentrate its best service. The PTN is based on a Transit Orientation Index (TOI), which was developed using detailed regression analysis to evaluate how different land use and demographic variables affect transit demand. The PTN is separated into a “High Speed Network,” which include LRT lines and Regional Rapid Bus, and “Other Primary Transit Network Services,” which include Frequent Bus and Primary bus services. Streetcars were not part of the regional transportation system at the time. The PTN identifies key transit corridors and connections, not specific alignments.

#### **What Methods Will Be Used to Identify Potential Corridors & Connections?**

Identification of transit corridors and connections for consideration in the Streetcar System Plan must rely on more than a simple demand analysis (as represented by the TOI). A multifaceted approach will be used, including:

- The Transit Orientation Index (TOI) will be updated to illustrate where the highest levels of 2030 transit demand in the City of Portland are anticipated;
- The existing and currently planned regional rail network will be reviewed to ensure there is no duplication of capital-intensive corridor service;
- A layered analysis of transit ridership/loading, transit-supportive zoning, transit supportive planned land development, density of commercial/retail uses, street design, etc. will be conducted and presented using a series of GIS based maps;
- A half-day work session will be held with the Bureau of Planning to identify potential areas where land use opportunities may present opportunities for future streetcar or intermediate/high-capacity transit investment that are not apparent from technical analysis;
- TSP street classifications and roadway design specifications will be reviewed to identify opportunities or conflicts for future streetcar and other transit delivery modes (ie, BRT, Rapid Bus, etc.); and

- A technical team will work with PDOT to review, critique and finalize the Draft PTN concept and to ensure other important non-PTN corridors are included in the final list of potential corridors.

### Who are the Project Participants?

The Portland Office of Transportation (PDOT) is the lead agency and has contracted with URS and Nelson\Nygaard Consulting Associates to support the city staff. PDOT has formed a Development Oriented Transit Team (DOTT) including PDOT, TriMet, Bureau of Planning, PDC and Metro. The team will meet several times during the project to guide the study and review interim work products to make sure the project is aligned with agency/bureau objectives and plans. This team is responsible for final decisions on the PTN project.

Opportunities for public review and comment on the PTN will be included as part of the Portland Streetcar System Planning effort.

### What is the Project Schedule?

The project started in mid June and is scheduled to be complete by September 2007.

Tasks	June 2007	July 2007	August 2007	Sept. 2007
Kick-Off Meeting	—			
Task 1: Planning Context	—————			
Task 2: Updating the TOI	—————★			
Task 3: identify Emerging Corridors		—————★		
Task 4: Evaluate TSP		—————		
Task 5: Develop Draft PTN		—————	—————★	
Task 6: TC Review, refine draft PTN			—————	—————★
Task 7: Public Involvement mtgs. (1)				—————★
Task 8: Updated PTN (2)				—————→
★ DOTT Meeting ☆ PTN Briefing/Presentation at TPAC (1) Public Involvement meetings likely to occur in late September 07. (2) Updated PTN to be completed in October 2007.				

For additional information, contact Patrick Sweeney (PDOT) at 503.823.5611



DATE: June 28, 2007  
TO: TPAC and interested parties  
FROM: Kim Ellis, Principal Transportation Planner  
SUBJECT: Performance Evaluation and Monitoring Framework for the 2035 Regional Transportation Plan (RTP)

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## PURPOSE

This memo summarizes RTP policy and plan development work completed to date and describes the overall framework for evaluating and monitoring the 2035 RTP. The memo also recommends a set of principles to guide identification of a set of performance measures that will be adopted as part of the final 2035 RTP in 2008. For now, the principles are recommended to guide narrowing the more than 50 potential performance measures identified in the provisional draft RTP policy framework (*dated March 1, 2007*)<sup>1</sup> to a smaller set of key performance measures for the first round of analysis.

The purpose of the June 29 agenda item is to begin discussion to identify the initial set of key performance measures that will be used to report the results of the system analysis conducted this summer.

## ACTION REQUESTED

- Endorse the principles recommended to guide narrowing the pool of potential performance measures to a smaller set of key performance measures.
- Provide input on gaps in the provisional draft policy framework performance measures.
- Provide input on which measures are most relevant to focus on in the first round of analysis.
- Identify 3 to 5 TPAC members to participate in a performance measures work group to develop a recommendation on a full set of measures for the 2035 RTP by the end of the 2007.

The performance measures work group will meet 2 to 3 times over the next several months to continue to refine the initial set of performance measures for future rounds of analysis to be conducted in 2008 during development of the state component of the 2035 RTP. This work will be integrated with work already underway with the Regional Freight and Goods Movement (RFGM) Technical Advisory Committee and (RFGM) Task Force.

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<sup>1</sup> The policy framework is available to download from Metro's website at: <http://www.metro-region.org/article.cfm?articleid=19896>.

## How the Initial Set of Measures Will Be Used

It is important to note that the initial, narrowed set of performance measures are intended to serve as a starting point and be the focus of the first round of analysis to be conducted this summer. The measures will be used to:

- develop and organize the key findings about the system-level impacts of the pool of investments submitted by Metro, ODOT, TriMet and local agencies;
- inform prioritization of investments for the federal component of the RTP this fall by MPAC, JPACT and the Metro Council; and
- inform upcoming work to develop a recommended set of performance measures for the 2035 RTP by the end of the 2007.

Findings from the first round of analysis will be used to identify refinements to the draft policy framework and frame two additional rounds of analysis to be conducted for the state component of the RTP in 2008. Additional investments may be identified to address transportation needs to respond to findings of the analysis. Further refinements to the draft policy framework and performance measures may also be identified in 2008 as part of the state component of the 2035 RTP.

## BACKGROUND AND CONTEXT

The RTP is the long-range blueprint for the transportation system serving the Portland metropolitan region. The plan deals with how best to move people and goods in and through the region and establishes the policy framework to guide the design, management and governance of investments in the region's transportation system for all forms of travel—motor vehicle, transit, bike, and pedestrian—and the movement of goods and freight.

The primary mission of the Regional Transportation Plan is to implement the Region 2040 vision for land use, transportation, the economy and the environment. As required under federal and state law, the RTP also serves as a long-range capital plan that will guide the public and private expenditure of billions of dollars from federal, state, regional and local revenue sources. The RTP serves this function by considering current and long-range transportation needs at a regional level and identifying policies, implementation strategies, programs and projects to meet those needs. The plans of local jurisdictions responsible for the transportation system in this region must be consistent with the RTP policies, implementation strategies, programs and projects. Furthermore, projects and programs must be included in the RTP financially constrained system to be eligible for federal and state funding programs.

## Goals for the Regional Transportation System – Provisional Draft RTP Policy Framework

In June 2006, the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) approved a work program and process to guide the current update to the Regional Transportation Plan (RTP). The work program calls for an outcomes-based approach to identify and prioritize transportation investments that are crucial to region's economy and that most effectively support the land use, economic, environmental and transportation goals embodied in the 2040 Growth Concept. Since approval of the work program, Metro conducted research on the current transportation system.<sup>2</sup> The research included:

- Analysis of current regional transportation system conditions, issues and policies, and relevant finance, land use, environmental, economic and demographic trends.
- Targeted public outreach through the website, Councilor and staff presentations to business and community groups, a series of stakeholder workshops to identify desired outcomes for the region's transportation system and issues to be addressed, and public opinion research.

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<sup>2</sup> This research is summarized in a series of background papers and reports that are available to download from Metro's website at: <http://www.metro-region.org/article.cfm?articleid=19896>.

The research findings guided development of a provisional draft RTP policy framework (*dated March 1, 2007*), which will in turn guide development and analysis of the rest of the 2035 RTP. The framework includes new policy direction to be used when identifying regional transportation needs and during the evaluation and prioritization of investments to the regional transportation system. The purpose of this updated framework is to sharpen the focus of the RTP on those transportation-related actions that most affect the implementation of the Region 2040 Growth Concept and will respond effectively to the powerful trends and challenges facing our region today.

The framework reflects the continued evolution of regional transportation planning from a primarily project-driven endeavor to one that is framed by the larger set of outcomes that affect people’s everyday lives, commerce and the quality of life in this region. The goals, objectives and potential performance measures identified in the draft policy framework acknowledge the broader impacts of transportation on these outcomes. The framework includes nine goals that link transportation investments to Region 2040 goals for transportation, land use, the economy, and the environment, placing the highest priority on investments that reinforce Region 2040 and achieve multiple goals thereby maximizing the return on public investments in the transportation system. The nine goals are listed in **Table 1** for reference.

**Table 1. Regional Transportation Plan Goals**

<b>System Design and Management</b>
<b>Goal 1 Efficient Urban Form</b> Decisions about land use and multi-modal transportation infrastructure and services are linked to promote an efficient and compact urban form that fosters good community design and optimization of public investments; and supports jobs, schools, shopping, services, recreational opportunities and housing proximity.
<b>Goal 2 Sustain Economic Competitiveness and Prosperity</b> Multi-modal transportation infrastructure and services support a diverse, innovative, sustainable and growing regional and state economy through the reliable and efficient movement of people, freight, goods, services and information.
<b>Goal 3 Transportation Choices</b> Multi-modal transportation infrastructure and services provide all residents of the region with affordable and equitable access to affordable housing, jobs, services, shopping, educational, cultural and recreational opportunities, and all businesses of the region with competitive choices for goods movement.
<b>Goal 4 Reliable Movement of People and Goods</b> Multi-modal transportation infrastructure and services provide a seamless and well-connected system of thoroughways, arterials, freight systems, transit services and bicycle and pedestrian facilities to ensure effective mobility and reliable travel choices for people and goods movement.
<b>Goal 5 Safety and Security</b> Multi-modal transportation infrastructure and services are safe and secure for the public and goods movement.
<b>Goal 6 Human Health and the Environment</b> Multi-modal transportation infrastructure and services reduce greenhouse gas emissions and protect, restore and/or enhance the quality of human health, fish and wildlife habitats, and natural ecological systems.
<b>Governance</b>
<b>Goal 7 Effective Public Involvement</b> All major transportation decisions are open and transparent, and grounded in meaningful involvement and education of the public, including those traditionally under-represented, businesses, institutions, community groups and local, regional and state jurisdictions that own and operate the region’s transportation system.
<b>Goal 8 Fiscal Stewardship</b> Regional transportation planning and investment decisions maximize the return on public investment in infrastructure, preserving past investments for the future, emphasizing management strategies and prioritizing investments that reinforce Region 2040 and achieve multiple goals.
<b>Goal 9 Accountability</b> The region’s government, business, institutional and community leaders work together so the public experiences transportation services and infrastructure as a seamless, comprehensive system of transportation facilities and services that bridge institutional and fiscal barriers.

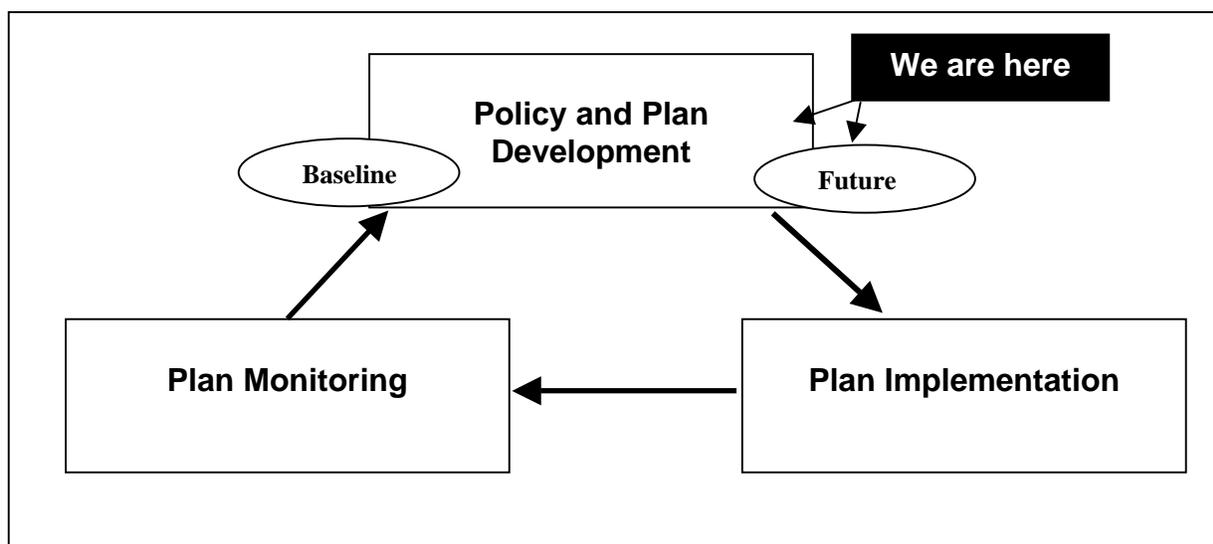
## DEVELOPMENT OF AN OUTCOMES-BASED PERFORMANCE EVALUATION FRAMEWORK

Performance evaluation is an important communication and reporting tool that can be used as an iterative feedback mechanism for setting and evaluating transportation policy and planning objectives and informing transportation investment actions and priorities. The evaluation and monitoring of system performance has long been a part of the development and implementation of previous RTPs. The application of a performance-based evaluation of transportation policy and planning objectives is a more recent trend in transportation planning, occurring since the last major update to the RTP in 2000.<sup>3</sup>

### Defining the Concept of Performance Measurement – The Framework for Plan Development, Evaluation and Monitoring of the 2035 RTP

Performance management is a practical tool to link performance evaluation to policy development, evaluation and monitoring of the 2035 RTP. Use of performance measures that report on how transportation affects the daily activities of businesses and residents in the region inform decision-makers about how best to improve transportation services for all users of the regional transportation system and ensure effective implementation of the Region 2040 Growth Concept.

**Figure 1. Regional Transportation Plan Performance Management System**



The RTP will refer to the process of plan development, evaluation and monitoring over time as “performance management” as shown in **Figure 1**. Within this framework, the RTP will use “goal,” “objective,” “indicator,” “performance measure,” and “benchmark” to label the distinct elements of the outcomes-based performance management system developed for the RTP.

- A **goal** is a statement of purpose that describes long-term desired outcomes for the region’s transportation system to support and implement the Region 2040 vision.
- An **objective** is similar to a goal as it also represents a desired outcome. However, an objective is an intermediate, shorter-term result that must be realized during the plan period to reach the longer-term goals of the RTP. An objective is measurable.

<sup>3</sup> This trend is documented in Transportation Research Board Conference Proceedings 36: Performance Measures to Improve Transportation Systems, August 22-24, 2004.

- An **indicator** is a categorical term for a particular feature of the transportation system that is tracked over time. Indicators are conceptual and qualitative and are tied to the policy framework's goals and objectives. Examples of indicators include access to jobs/access to market areas, reliability, mobility, travel options, equity, clean air and environmental stewardship. No single indicator provides a comprehensive evaluation of the transportation system. Instead, each indicator contributes a piece of information that, when considered with all other indicators, provides a complete picture of the transportation system's effectiveness, documenting how well the system of investments meet the RTP policy framework's goals for the regional transportation system. The indicators need to be translated into specific measures to be meaningful in the planning and decision-making process.
- A **performance measure** is a quantitative method of analysis used to evaluate the condition or status of an indicator to determine the degree of success a project or program has had in achieving its stated goals and objectives. Some measures can be used to predict the future as part of an evaluation process, while other measures can be used to monitor changes of based on actual empirical or observed data. In both cases, they can be applied at a system level, corridor level and project level, and provide the planning process with a basis for evaluating alternatives and making decisions on future transportation investments. Quantified results from performance measures can be compared to baseline data over time to track progress and to compare between different levels of transportation investments. Tracking progress against the goal or objective allows an assessment of the effectiveness of actions. This is very important for measuring improvement or maintenance of existing conditions. They can also be used to monitor performance of the plan in between updates to determine whether refinements to the policy framework, investment priorities or other plan elements are needed. Evaluation of investment alternatives for the 2035 RTP will occur using predictive data derived from Metro's regional travel forecast model and geographic informational systems (GIS) analysis.
- A **benchmark** is the expressed goal of the indicator, assigning a value to what the RTP is trying to achieve. Benchmarks (also known as targets) are expressed in quantitative terms and provide an important measure of progress toward achieving different goals within a timeframe specified for it to be achieved. Benchmarks will be developed for the state component of the 2035 RTP in 2008. Monitoring of the benchmarks would occur through periodic updates to the RTP and Metro's biennial Performance Indicators reporting using observed, empirical data.

#### **APPLYING THE CONCEPT OF PERFORMANCE MEASUREMENT TO GOAL 6 OF THE PROVISIONAL RTP POLICY FRAMEWORK**

It is helpful to apply these terms to the draft RTP policy framework for illustrative purposes. For example, **Goal 6** in the policy framework calls for a transportation system that reduces greenhouse gas emissions and protects, restores and/or enhances the quality of human health, fish and wildlife habitats, and natural ecological systems. **Objective 6.2** under Goal 6 calls for improving air quality so that human health is maintained and greenhouse gas emissions are reduced. **Indicators** to track whether investments in the transportation system will result in achieving this objective could be viable travel options or air quality. A **performance measure** could be percent of travel by walking, biking or transit to, from and within 2040 centers or tons of carbon dioxide or ozone emitted region-wide. A **benchmark** could be achievement of the RTP Non-SOV modal targets by the year 2040 or reducing greenhouse gas emissions 20 percent from today's level by the year 2035. Each level within the performance management framework represents different, yet interrelated levels of outcomes the RTP is trying to achieve – going from the very broadly defined desired outcome (a goal) to a very specific desired outcome (the benchmark).

## **Linking Performance Evaluation and Monitoring with the RTP Update Planning Process**

The draft RTP policy framework emphasizes a system approach to maximize public investments in the transportation system when addressing the region's transportation needs and implementing the Region 2040 Growth Concept. The region is expected to grow by 1 million people in the next two decades. At the same time, the transportation system is aging and existing resources and sources of revenue are not keeping pace with our needs. To respond to these and other significant challenges facing the region, the 2035 RTP update broadens the evaluation of system performance to be more closely linked to the goals and objectives identified for the regional transportation system to monitor the effectiveness of a particular system of investments.

The provisional draft RTP policy framework lays out the region's goals for the transportation system and more than 50 ways to measure the region's progress in achieving the goals. The next step is to narrow the set of "potential performance measures" to a set of key measures that will be the focus of the first round of analysis conducted this summer. A performance measures work group will meet 2 to 3 times over the next several months to continue to refine the initial set of performance measures for future rounds of analysis to be conducted in 2008 during development of the state component of the 2035 RTP.

The purpose of the system analysis to be conducted in summer of 2007 and spring of 2008 is to evaluate performance of different RTP systems and draw conclusions about how well different levels of investment meet the goals identified for the regional transportation system. Two levels of investment will be developed for the 2035 RTP. The first level, the *2035 RTP Financially Constrained System*, will represent the most critical transportation investments for the plan period.<sup>4</sup> The second level, the *2035 RTP Illustrative System*, will represent additional priority investments that would be considered for funding if new or expanded revenue sources are secured.<sup>5</sup> A parallel effort is underway to develop a finance strategy for the second level of RTP investments.

## **Benefits of Performance-Based Evaluation and Monitoring**

An outcomes-based plan requires careful monitoring to ensure that incremental decisions to implement the plan through land use decisions and corridor and project planning are consistent with the plan vision, as measured by specific outcomes. However, monitoring the effectiveness of transportation investments is challenging. System performance is the result of multiple factors, including land use, land supply, cost, availability of capacity and transportation options, and demand for travel. Despite being challenging, benefits of this approach to performance-based evaluation and monitoring include:

- Measurement of and feedback on the draft policy framework policies and investment priorities submitted by ODOT, TriMet and local agencies.
- Improved communication of needs and priorities, which is especially important given the limited resources available for funding.
- Informed decision-making.
- Increased transparency of the transportation analysis and decision-making process.
- Increased accountability through periodic reporting.

The final 2035 RTP will include a set of performance measures and benchmarks to examine and monitor the results of plan implementation over time. Performance-based management and monitoring of the RTP will continue to be used beyond the update to track progress of RTP implementation over time through periodic updates to the plan and through Metro's biennial performance indicators reporting process. The

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<sup>4</sup> The 2035 Financially Constrained System will be the basis for findings of consistency with federal metropolitan transportation planning factors, the Clean Air Act and other planning provisions identified in SAFETEA-LU.

<sup>5</sup> The 2035 Illustrative System will be the basis for findings of consistency with the Statewide Planning Goal 12, the Oregon Transportation Planning Rule and the Oregon Transportation Plan and its components.

measures serve as the dynamic link between RTP goals and plan implementation by providing a more formal process of evaluation and monitoring to ensure the RTP satisfies the regional goals for transportation, land use, the economy and the environment. Through evaluation and monitoring, the region can be sure that investments in the transportation system are achieving desired outcomes and getting the best return on public investments. Development of a performance management process also satisfies mandated benchmarks specified by the Oregon Transportation Planning Rule (TPR) and federal requirements to establish a performance monitoring system as part of the Congestion Management Process (CMP).

## **PRINCIPLES FOR SELECTING A KEY SET OF PERFORMANCE MEASURES FOR THE 2035 RTP**

The provisional draft RTP policy framework (*dated March 1, 2007*) contains a list of more than 50 potential performance measures that sometimes overlap and at times are ambiguous or difficult to measure. The following principles are recommended to guide narrowing the pool of potential performance measures to a set of key performance measures to conduct a system-level of analysis of RTP investments and actions:

- 1. The measures should reflect the underlying goals and objectives expressed in the policy framework; and should be relevant to and easily understood by the public, staff and elected officials.** This is particularly important so the measures can be meaningfully incorporated into the RTP decision-making process. The measures should be unambiguous and simple to present and interpret. The measures should also focus on the *results or outcomes* of our transportation investments that relate directly to traveler experiences and perceptions of the transportation system. By focusing on the results or outcomes we are trying to achieve and that are important to users of the system – JPACT, MPAC and the Metro Council can use this information to make choices about investment priorities. Use of relevant and easy to understand measures promotes transparency and accountability in the decision-making process and allows for more effective communication of the value of different investments in the transportation system to build understanding of and support for different types of investments. Effective communication with the public is also important as residents, businesses and other stakeholders want to know how priorities for investments in the transportation system are determined, and what benefits or improved services they will receive from increased investments in the transportation system.
- 2. A manageable number of measures should be created that provide value to the decision-making process.** A range of key measures should be identified to capture the state of the transportation system without being too large or unwieldy. When reported together, the measures should tell a compelling story that provides a scorecard of how well the system of investments satisfies the goals/desired outcomes identified for the regional transportation system. In addition, there should be an overall balance and flexibility among measures. It should be recognized that the combined set of measures contributes something to the overall evaluation of the transportation system and that all goals/desired outcomes included in the draft policy framework are equally important to evaluate. The measures should apply to multiple modes and be meaningful at a different scales and settings – such as the system, corridor and/or project level.
- 3. Data should be accurate, relatively simple to collect, report and maintain, and be able to be forecasted.** The measures should be appropriate to the different types of decisions being made and data collection/analysis capabilities. Generally, data should not be too difficult or time consuming to collect or report. The measures should be based on reliable forecast data and other data that can be gathered and updated on a periodic basis. Baseline and forecasted data for the analysis will be derived from Metro’s Metroscope model, Metro’s regional travel forecast model (regional model), created using EMME/2 transportation modeling software, and geographic informational systems (GIS) analysis to be conducted using Metro’s Regional Land Information

System (RLIS) and other available data. For some measures, the availability of data or analysis capabilities may be limited. An important outcome of this process will be to identify follow-on work needed to further develop the RTP performance evaluation and monitoring process.

4. **The measures should assess specific impacts (positive and negative) of actions the RTP can influence.** The measures should assess the quality of the transportation services provided and the broader societal impacts that the transportation system has on our region. Previous RTPs have focused primarily on measuring congestion, thereby giving less attention to other goals identified in the plan during the decision-making process. The evaluation framework should provide sufficient information to allow the region to respond to what we learn, making refinements if needed.

### RECOMMENDED PERFORMANCE MEASURES FOR EVALUATING THE FIRST ROUND OF ANALYSIS

Indicator	Measure	Goals Addressed
Efficient access to daily needs	Average trip length	Goal 1: Efficient urban form, Goal 6: Human health and the environment
Reliance on driving to meet daily needs	Total vehicle miles traveled	Goal 1: Efficient urban form, Goal 5: Safety and security, Goal 6 Human health and the environment
	Vehicle miles traveled per person	Goal 1: Efficient urban form, Goal 5: Safety and security, Goal 6 Human health and the environment
Viable travel options to meet daily needs	Transit riders per service hour	Goal 1: Efficient urban form, Goal 3: Transportation choices
	Percent of homes within ¼-mile of regional multi-use trail system	Goal 1: Efficient urban form, Goal 3: Transportation choices
	Percent of homes and jobs within ¼-mile of regional transit service	Goal 1: Efficient urban form, Goal 3: Transportation choices
	Non-auto person trips (miles)	Goal 3: Transportation choices, Goal 6 Human health and the environment
	Percent of trips by walking, biking, transit and shared ride (by 2040 land uses)	Goal 1: Efficient urban form, Goal 3: Transportation choices, Goal 6: Human health and the environment
Access to jobs/access to markets	Travel times for selected links in the Congestion Management Process (CMP) network (PM 2-hr peak period and mid-day period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
	Auto and transit travel time contours for central city and regional centers (PM 2-hr peak period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
	Auto travel time contours for 2040 industrial areas and intermodal facilities (mid-day period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
	Percent of homes within 30 minutes travel time of employment by auto and transit (PM 2-hr peak period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 3 Transportation choices
Reliability of goods movement	Delay for main roadway routes on the regional freight network (mid-day period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
	Volume/capacity for main roadway routes on the regional freight network (mid-day period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods

<b>Indicator</b>	<b>Measure</b>	<b>Goals Addressed</b>
Regional and statewide passenger and goods movement	Multi-modal mobility corridor volume/capacity ratio (PM 2-hr peak period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 3: Transportation Choices, Goal 4 Reliable movement of people and goods
	Percent of lane miles of congestion by functional classification (PM 2-hr peak period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
	Percent of delay by functional classification (PM 2-hr peak period)	Goal 2: Sustain economic competitiveness and prosperity, Goal 4 Reliable movement of people and goods
Clean air	Tons per year of greenhouse gas emissions (e.g., carbon dioxide)	Goal 2: Sustain economic competitiveness, Goal 6: Human health and the environment
	Tons per year of particulates (PM 2.5) and air toxic pollutants released	Goal 2: Sustain economic competitiveness, Goal 6: Human health and the environment
Environmental stewardship	Acres of regionally significant Goal 5 resources impacted by new transportation infrastructure	Goal 6: Human health and the environment
	Acres of riparian and wildlife corridors impacted by new transportation infrastructure.	Goal 6: Human health and the environment
Equity	Percent of environmental justice target area homes within ¼-mile regional transit service	Goal 3: Transportation Choices

For purposes of the evaluation, specific performance measures for the governance related goals (Goals 7, 8 and 9) are not recommended at this time because they do not meet the principles described in the previous section. Performance measures for these goals will be developed as part of the follow-on performance measures work group discussions.