

M E M O R A N D U M
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DATE: July 27, 2007
TO: TPAC and interested parties
FROM: Kim Ellis, Principal Transportation Planner
SUBJECT: 2035 RTP Update – Financially Constrained Worksheet Instructions

Purpose

The purpose of this memo is to provide project coordinators with guidelines and instructions for submitting the Regional Transportation Plan (RTP) Financially Constrained System worksheet (Attachment 2) for the federal component of the 2035 RTP. ODOT, TriMet and local agency federal priorities will be subject to a formal public comment period to be held from October 15 – November 15, 2007.

Action Requested

- ODOT, TriMet and local project coordinators are requested to **present their respective preliminary list of federal investment priorities to TPAC on August 31**. TPAC members will discuss the general mix of projects under discussion as they relate to Region 2040, RTP policy framework goals and air quality conformity guidelines identified in Attachment 1.
- Submit the completed worksheet (Attachment 2) via email to **Josh Naramore at Metro by 5:00 PM on Friday, September 7**.

Background

ODOT, TriMet and local project coordinators are requested to complete the attached RTP Financially Constrained System worksheet in preparation for the public comment period to be held from October 15 – November 15, 2007 for the federal component of the 2035 RTP. *These worksheets should be completed by the respective city or county coordinating committee representatives and e-mailed to Josh Naramore at Metro by 5:00 PM on Friday, September 7*. Metro will then compile the materials and forward them to TPAC members and the project coordinators for final review by September 17.

Metro will assess projects submitted according to relevance to goals and across traditional modal categories, comparing federal investment priorities to the 200% list submitted by agencies in June.

Guidelines for Identifying Federal Priorities

The following are general guidelines for completing the worksheets:

1. Agencies should refer to Attachment 1 “Principles for Shaping the 2035 Financially Constrained System” to guide identification of federal investment priorities. Agencies are requested to draw investment priorities from the 200% list of investments submitted during the solicitation process in June. Agencies may submit new projects that meet the RTP solicitation general eligibility requirements and have been screened according to the solicitation packet and are within their local revenue target.¹ Those projects that address multiple RTP goals are encouraged to be submitted as federal investment priorities.
2. Each worksheet includes a sub-area target² (as listed below) and is pre-formatted to total project costs. Two Multnomah County worksheets are included to allow a separate accounting of Willamette River Bridge projects, as noted in the targets below:

	Regional Revenue	Local Revenue	Total
<i>City of Portland/Port</i>	<i>\$262.9 million</i>	<i>\$786.5 million</i>	<i>\$1,049 million</i>
<i>Washington County and cities</i>	<i>\$239.9 million</i>	<i>\$1,812 million</i>	<i>\$2,051.9 million</i>
<i>Clackamas County and cities</i>	<i>\$211.9 million</i>	<i>\$960.1 million</i>	<i>\$1,172 million</i>
<i>Multnomah County and cities (excluding Portland)</i>	<i>\$63.4 million</i>	<i>\$761 million</i>	<i>\$824.7 million</i>
<i>Willamette Bridges</i>	<i>\$113.6 million</i>	--	<i>\$113.6 million</i>
<i>TriMet and regional programs</i>	<i>\$499.9 million</i>	--	<i>449.9 million</i>
<i>ODOT</i>	<i>\$828.6 million</i>	--	<i>\$826.6 million</i>

3. The worksheet for each subarea is organized according to “exempt” and “non-exempt” categories for the purpose of air quality analysis. In general, projects that are not expected to create a new roadway or add significant capacity to an existing roadway are “exempt.” Examples of exempt projects include bikeways and sidewalks, regional trails, demand or system management programs and transit. All roadway capacity and new roadway connection projects are “non-exempt.” The purpose of dividing these projects is to assist Metro staff with identifying projects that will need to be analyzed with the regional emissions model during the conformity analysis this winter.
4. Discrete state highway and transit capital projects located in the respective sub-areas only need to be listed when a jurisdiction is providing local match (such as the streetcar projects). For the purposes of this exercise, only report on the regional and local match portions of the project costs. Metro will facilitate any inconsistencies or overlap between local jurisdictions, ODOT and TriMet on these assumptions, as needed.
5. Project costs are divided into regional and local, based on revenue source, and these columns should be completed, accordingly. In many cases the funding share between local and regional sources will be estimated, and funding source should simply be based on the best information available. “Regional” funding sources for local projects are federal or state sources of money of revenue not collected locally.

¹ The 2035 RTP solicitation packet is available to download from Metro’s website at <http://www.metro-region.org/article.cfm?ArticleID=24619> for new projects that were not submitted to Metro during the solicitation process last spring.

² The worksheet targets reflect updated data described in the July 24, 2007 memorandum from Steve Siegel, “Revised Financially Constrained Revenue Estimates.”

Agency Contacts

The ODOT, TriMet and local agency project coordinators for this process are as follows, and should be the contact person for specific project questions and input at the local level:

<i>City of Portland</i>	<i>Courtney Duke</i>	<i>(503) 823-7265</i>
<i>Port of Portland</i>	<i>Robin McCaffrey</i>	<i>(503) 944-7513</i>
<i>Washington Co.</i>	<i>Clark Berry</i>	<i>(503) 846-3876</i>
<i>Clackamas Co.</i>	<i>Ron Weinman</i>	<i>(503) 353-4533</i>
<i>Multnomah Co.</i>	<i>Ed Abrahamson</i>	<i>(503) 988-5050 x29620</i>
<i>ODOT</i>	<i>Rian Windsheimer</i>	<i>(503) 731-8456</i>
<i>TriMet</i>	<i>Phil Selinger</i>	<i>(503) 962-2137</i>

Please contact me by phone at (503) 797-1617 or email at ellisk@metro.dst.or.us with any questions about the 2035 RTP update or this exercise.

*Please e-mail completed federal priorities worksheets to:
naramorej@metro.dst.or.us
by 5:00 PM on Friday, September 7*



Principles for Shaping the 2035 Financially Constrained System

1. Promote 2040 Growth Concept

- Reinforce growth in 2040 priority areas (central city, regional centers, industrial areas & intermodal facilities)
- Achieve geographic balance

2. Support RTP Policy Framework (*dated March 1, 2007*)

- Improve reliability of state and regional mobility corridors
- Address multi-modal system gaps
- Address multi-modal system deficiencies
- Expand transportation choices
- Improve safety and security
- Benefit human health
- Benefit the natural environment

3. Preserve AQ Conformity Status

- Encourage exempt projects
- Meet Transportation Control Measures (TCMs) as established in maintenance plan



METRO

Assessment of 2035 Financially Constrained System

2040 Investment Areas	Draft 200% List	2040 Program Areas	Draft 100% List
		State and Regional Mobility Corridors	
		Centers and Main Streets	
		Industrial and Employment Areas	
		2040 Corridors	
		Regional Bridges	
		Other Areas	

Modal Balance	Draft 200% List	Project Mode Category	Draft 100% List
		Highway	
		Road/ITS	
		Transit	
		Bridge	
		Bicycle & Pedestrian	
		Boulevard	
		TDM	

2035 Regional Transportation Plan Financially Constrained System

Clackamas County and cities

Regional/Local Portion of Projects Cost (2007 \$)

	\$211,900,000	\$960,100,000
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Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$1,172,000,000

2035 Regional Transportation Plan Financially Constrained System

Multnomah County and cities

Regional/Local Portion of Projects Cost (2007 \$)

	\$63,400,000	\$874,600,000
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Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$938,000,000

2035 Regional Transportation Plan Financially Constrained System

Portland and Port

Regional/Local Portion of Projects Cost (2007 \$)

	\$262,900,000	\$786,500,000
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Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$1,049,400,000

2035 Regional Transportation Plan Financially Constrained System

Washington County and cities

Regional/Local Portion of Projects Cost (2007 \$)

	\$239,900,000	\$1,812,000,000
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Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$2,051,900,000

2035 Regional Transportation Plan Financially Constrained System

ODOT

Regional/Local Portion of Projects Cost (2007 \$)

\$828,600,000

Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$828,600,000

2035 Regional Transportation Plan Financially Constrained System

TriMet and Metro Regional Programs

Regional/Local Portion of Projects Cost (2007 \$)

\$499,900,000

Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$499,900,000

2035 Regional Transportation Plan Financially Constrained System

Willamette River Bridges

Regional/Local Portion of Projects Cost (2007 \$)

\$113,600,000

Air Quality Exempt Projects

RTP No.	Project Name	Regional	Local	Regional/Local Total
New	North Ventura Avenue Sidewalks	\$2,000,000	\$200,000	\$2,200,000
New	South Ventura Avenue Sidewalks	\$1,000,000	\$100,000	\$1,100,000
10000	Busy Bikeway	\$1,000,000	\$500,000	\$1,500,000
				\$0
				\$0
				\$0
				\$0
Total Exempt Project Costs				\$4,800,000

Air Quality Non-Exempt

RTP No.	Project Name	Regional	Local	Regional/Local Total
19999	Schwarzenegger Parkway - Phase 1	\$2,100,000	\$1,200,000	\$3,300,000
				\$0
				\$0
				\$0
				\$0
				\$0
Total Non-Exempt Project Costs				\$3,300,000

2035 Financially Constrained Sub-Area Total
2035 Financially Constrained Sub-Area Target

\$8,100,000
\$113,600,000

