

A G E N D A

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METRO

MEETING: JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION
DATE: March 13, 2008
TIME: 7:30 A.M.
PLACE: Council Chambers, Metro Regional Center

7:30 AM	1.	CALL TO ORDER AND DECLARATION OF A QUORUM	Rex Burkholder, Chair
7:32 AM	2.	INTRODUCTIONS	Rex Burkholder, Chair
7:35 AM	3.	CITIZEN COMMUNICATIONS	
7:40 AM	4.	COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS	Rex Burkholder, Chair
7:45 AM	5.	CONSENT AGENDA	
	5.1	* Consideration of the JPACT Retreat and JPACT minutes for February 1, 14 and 28, 2008.	Rex Burkholder, Chair
	6.	ACTION ITEMS	
7:50 AM	6.1	* Resolution No. 08-3916, For the Purpose of Adopting the Policy Direction and Program Objectives of the 2009 Regional Flexible Funding Allocation Process and 2010-2013 Metropolitan Transportation Improvement Program (MTIP) – <u>ACTION REQUESTED</u>	Ted Leybold
8:00 AM	6.2	* Resolution No. 08-3919, For the Purpose of Adopting the Regional Travel Options 2008-2013 Strategic Plan – <u>ACTION REQUESTED</u>	Pam Peck
	7.	INFORMATION ITEMS	
8:15 AM	7.1	* RTP State Component Work Program – <u>DISCUSSION</u>	Kim Ellis
8:35 AM	7.2	* Financial Incentives Toolkit & SDC Report – <u>INFORMATION</u>	Miranda Bateschell Malu Wilkinson
8:50 AM	7.3	* Oregon Transportation Commission (OTC) Federal Earmark Policy – <u>INFORMATION</u>	Travis Brouwer
9:00 AM	8.	ADJOURN	Rex Burkholder, Chair

* Material available electronically.

** Material to be emailed at a later date.

Material provided at meeting.

All material will be available at the meeting.

For agenda and schedule information, call Kelsey Newell at 503-797-1916. e-mail: Newellk@metro.dst.or.us
To check on closure or cancellations during inclement weather please call 503-797-1700.

2008 JPACT Work Program

3/6/08

	<p>July</p> <ul style="list-style-type: none"> • Lake Oswego to Portland DEIS Funding Plan • HCT Plan Briefing • Columbia River Crossing Preferred Alternative RTP amendment
<p>February 14, 2008</p> <ul style="list-style-type: none"> • Federal Project Priorities • MTIP Policy Direction - Discussion 	<p>August</p> <ul style="list-style-type: none"> • Quarterly RTP Worksession
<p>March 5,6 – DC Trip March 13, 2008</p> <ul style="list-style-type: none"> • Direction on RTP – Next Phase • MTIP Policy Direction - Approval • RTO 5-year Strategic Plan 	<p>September</p> <ul style="list-style-type: none"> • Intro Staff Recommended Reg Flex Fund 1st Cut • Intro ODOT TIP Projects • I-5/99W Preferred Alternative RTP Amendment
<p>April 10, 2008</p> <ul style="list-style-type: none"> • Unified Work Program Approval • Finance Options Discussion • Regional System Designation • Approve 08-11 STIP "cut" package 	<p>October</p> <ul style="list-style-type: none"> • Release MTIP for public comment • Adopt regional position on state funding strategy
<p>May</p> <ul style="list-style-type: none"> • Quarterly RTP Worksession • Air quality update • Milwaukie Preferred Alternative – briefing 	<p>November</p> <ul style="list-style-type: none"> • Quarterly RTP Worksession <p>MTIP Hearings</p>
<p>June</p> <ul style="list-style-type: none"> • TriMet 5-year TIP Comments • Milwaukie LRT Preferred Alternative RTP Amendment -- Approval <p>Reg. Flex Fund Application Deadline</p>	<p>December</p> <ul style="list-style-type: none"> • Sellwood Bridge Preferred Alternative RTP Amendment • Sunrise Project Preferred Alternative RTP Amendment • Adopt regional position on federal funding strategy



METRO

Joint Policy Advisory Committee on Transportation Retreat

MINUTES

February 1, 2008

7:30 a.m. – 3:00 p.m.

Oregon Zoo, Skyline Room

MEMBERS PRESENT

Rex Burkholder, Chair
Sam Adams
James Bernard
Rob Drake
Fred Hansen
Kathryn Harrington
Robert Liberty
Lynn Peterson
Roy Rogers
Steve Stuart
Paul Thalhofer
Ted Wheeler

AFFILIATION

Metro Council
City of Portland
City of Milwaukie, representing Cities of Clackamas Co.
City of Beaverton, representing Cities of Washington Co.
TriMet
Metro Council
Metro Council
Clackamas County
Washington County
Clark County
City of Troutdale, representing Cities of Multnomah Co.
Multnomah County

ALTERNATES PRESENT

Tom Brian
Nina DeConcini
Tom Imeson
Donna Jordan
Susie Lahsene
Dean Lookingbill
Rian Windsheimer

AFFILIATION

Washington County
DEQ
Port of Portland
City of Lake Oswego
Port of Portland
SW RTC
Oregon Department of Transportation (ODOT – Region 1)

GUESTS PRESENT

Ed Abrahamson
Kenny Asher
Andy Back
Dan Bates
Clark Berry
Gretchen Buehner
David Bragdon
Roland Chalpowski
Olivia Clark
Carlotta Collette
Jesse Cornett

AFFILIATION

Multnomah County
City of Milwaukie
Washington County
City of Portland
Washington County
City of Tigard
Metro Council
City of Portland
TriMet
Metro Council
Citizen

Kathleen Cosgrove	OHSU
Danielle Cowen	Clackamas County
Adam Davis	Davis, Hibbitts & Midgall, Inc.
Aaron Deas	TriMet
Rick Finn	Port of Portland
Elissa Gertler	Clackamas County
Cam Gilmour	Clackamas County
Michael Jordan	Metro (Facilitator)
Jane Heisler	City of Lake Oswego
Nancy Kraushaar	City of Oregon City
Tom Markgraf	CRC
Sarah Masterson	Office of Congressman Earl Blumenauer
Dennis Mulvihill	Washington County
Dave Nordberg	DEQ
Lawrence Odell	Washington County
Louis Orenals	Citizen
Mark Ottenad	City of Wilsonville
Ron Papsdorf	City of Grasham
Annette Price	Port of Portland
Karl Rhode	BTA
Lynn Rust	CRC
Sreya Sarkar	Citizen
Paul Smith	City of Portland
Peggidy Yates	Multnomah County

STAFF

Andy Cotugno, Richard Brandman, Randy Tucker, Kathryn Sofich, Jon Coney, Kim Ellis, Pat Emmerson, Josh Naramore, Kelsey Newell

1. AGREEMENT ON AGENDA

Chair Rex Burkholder called the meeting to order at 7:41 a.m.

Chair Burkholder briefly overviewed the agenda. The committee approved the agenda.

2. PURSUIT OF FUNDING MEASURES

2.1 Review of Polling

Mr. Adam Davis of Davis, Hibbitts & Midghall, Inc. appeared before the committee and provided a presentation on the public opinion survey results for regional transportation. (Presentation included as part of the meeting record.) His presentation included information on:

- Research Methodology
- Top Transportation Problems
- Seriousness of Problem
- Willingness to Pay More
- General Approach
- Support and Funding for Street, Road, Highway and Bridge Projects

- Support for Neighborhood Transportation Projects
- Support and Funding for Mass Transit Projects
- Support for a Transportation Funding Package
- Observations and Conclusions

Commissioner Sam Adams addressed the primary interests and concerns of Portland citizens including the importance of light rail, green elements, congestion management, city access, sidewalks, bike boulevards and general safety.

Additional committee discussion included the speed at which accidents are cleared, tolling and the public's general consensus to maintain and enhance existing roadways.

2.2 Discussion of Options for Local, State and Regional Funding

2.2.1 Review "Straw-man" funding calendar

Mr. Richard Brandman overviewed staff's initial attempt at completing the regional transportation calendar through 2009. He briefly introduced the transportation funding calendar assignment delegated to JPACT members at the January 10th meeting. Members were asked to complete a "straw-man" funding calendar for the region for spring 2008 through fall 2011.

2.2.2 Review local funding initiatives for 2008

Mr. Andy Cotugno referred to a handout outlining Clackamas, Multnomah and Washington Counties' recently passed and/or currently contemplated local transportation funding initiatives. Types of initiatives under consideration included (but were not limited too) street maintenance and vehicle registration fees, gas taxes and system development charges.

2.2.3 Review funding calendars from JPACT members (wall chart exercise)

Facilitator Michael Jordan initiated the discussion on local, state and regional funding measures by asking jurisdiction and agency representatives to compile a combined "straw-man" calendar through Fall 2009 outlining roadway, transit and other mode funding needs. Members were asked to consider the state and regional funding schedules/levels, reauthorization, 2009 versus 2011 regional measures and so on. Responses collected will be collated and distributed at the regular February JPACT meeting.

2.2.4 Discussion – Should local measures be coordinated in anyway; are there some common themes (like emphasis on Maintenance & Preservation) and common mechanisms (like street utility fees and vehicle registration fees)?

Mr. Cotugno initiated a brief discussion on the funding responsibilities for different elements of the regional transportation system. He provided the 2035 RTP's broad definition as well as potential criteria (owner, capacity, function and place-based) to help more specifically define local, regional and state responsibilities.

Commissioner Roy Rogers stated that the regional system must be defined prior to developing regional legislative measures or securing funds. In addition, he stated that if the system is defined and agreed upon, the individual jurisdiction and agency contributions are less significant because the funds generated benefit the entire region. Commissioner Tom Brian emphasized the need to move forward with a regional package while recognizing the local and regional project components are intertwined in the funding mechanism. There could be a regional package that also included

more local projects – modeled after the Regional Parks and Open Spaces Bond Measures that passed successfully last year.

Councilor Robert Liberty acknowledged the challenge in establishing a common vision and did not feel that defining a regional system prior to developing a regional funding measure was necessary. He emphasized discussion on outcomes identified in the recent opinion survey highlighted as more pertinent to developing a regional measure.

Commissioner Lynn Peterson recommended mapping the different regional system definitions, starting with the functional-based definition and then adding 2040 places and capacity-based criteria.

Commissioner Adams recommended considering user-based criterion and reward-based criterion that rewards local governments to implement the 2040 Growth Concept.

Additional committee discussion included developing a map that illustrates the regional system, and the transit and land use connection within that definition. There is currently a mismatch between governance and use of facilities. This exercise needs to help set regional, local and state priorities. Chair Burkholder asked staff and TPAC members to provide an initial analysis of the regional system and present their findings to JPACT over the next few months.

2.2.5 Review Governor's framework for developing a state measure

Mr. Randy Tucker of Metro appeared before the committee and presented information on the 2009 state legislative session. He briefly outlined the purpose of each of the Governor's three new transportation subcommittees: Vision, Governance and Public Awareness Subcommittees.

He stated that JPACT has representation on all three subcommittees:

Vision: Chair Burkholder, Mr. Fred Hansen, Mr. Bill Wyatt

Governance: Commissioner Lynn Peterson, Council President David Bragdon, Mr. Tom Imeson

Public Awareness: TriMet Staff Olivia Clark

2.2.6 Review proposed "Principles" for the Portland area to pursue

Mr. Tucker overviewed draft metropolitan region principles for a 2009 legislative transportation funding package. Topics highlighted included strategic system investments, Oregon's livability and sustainability, economic competitiveness and flexibility and equity for local governments.

The committee discussed the importance of regional endorsement of the principles. Staff recommended developing a resolution to formally move the principles forward as a tool for JPACT's liaisons at the 2009 legislative session. In addition, members recommended further strategy coordination with the Governor's subcommittees and MPAC. Some members also recommended adding an addendum to the principles with more specifics on funding proposals.

In addition, some members presented concern with preemption and the possibility of legislators disregarding the established principles. Mr. Tucker stated that JPACT would need to address this issue in future conversations by establishing a proactive approach and vision.

2.2.7 *Discussion – How do we coordinate on developing a state measures? How do we integrate out local measures with our proposals for state measures?*

Facilitator Jordan asked members to briefly update the committee on recently passed or currently contemplated funding initiatives. The committee determined that no opportunities exist for coordination on developing a state funding campaign for the local level at this time. The mechanisms and timelines for local initiatives did not coincide.

Commissioner Peterson recommended establishing a regional transportation authority subcommittee to address the funding gaps between the MTIP and region's needs. Commissioner Wheeler supported her comments and elaborated that Metro should act as lead in the subcommittee's investigation.

The committee agreed that this investigation is necessary and should be initiated soon in order to prepare the region for the 2009 legislative session. In addition, members supported further discussion on defining regional responsibilities and establishing a consensus on the regional system. Lastly, members discussed developing media campaigns to educate the public on regional themes including the economy, livability and climate change.

3. BREAK FOR WORKING LUNCH

The committee briefly recessed for lunch.

4. WASHINGTON DC TRIP PLANNING

4.1 Federal Reauthorization

4.1.1 Overview of the National Policy and Revenue Commission recommendations

Mr. Cotugno briefly presented results from the "Report of the National Surface Transportation Policy and Revenue Study Commission: Transportation for Tomorrow" published in December 2007. Information highlighted included:

- Transit, rail and highway annual capital investment levels,
- Current and proposed federal surface transportation programs
- Characteristics of metropolitan areas over one million people

4.1.2 Identification of key issues of interest to the Portland region

Ms. Olivia Clark of TriMet briefly presented draft recommendations for the Portland region's federal transportation policy approach. The recommendations will be used to help direct discussion with federal policy makers during JPACT's annual trip to Washington, DC in March. The recommendations emphasize the region's land use and transit interconnectedness.

Committee members requested that an additional recommendation be added for policy conversation regarding the usage of existing facilities efficiently and effectively while maintain stewardship of prior investments.

The committee will take action the policy recommendations at their February 14th meeting.

4.1.3 Meetings with Reauthorization Interest Groups (trip agenda)

Ms. Clark stated that JPACT members would have an opportunity to meet with some key members of Congress, staff and stakeholders while in Washington, DC. A series of meetings have been scheduled to provide members an opportunity to tell the region's success story, offer policy and political support, and encourage innovative and creative thinking between the nexus of transportation and climate change.

Committee members recommended coordination/collaboration with members of Transportation and Infrastructure Committee, Federal Highway Administrations, Drive Less Save More and other diverse interest groups.

4.2 Discussion of Project Priorities (Resolution No. 08-3891)

4.2.1 Is everyone satisfied with the list?

Mr. Cotugno briefly overviewed the federal fiscal year 2009 appropriation request list. He highlighted the City of Sandy's request to remove their initial appropriation request for bus and facility replacement. The committee had no additional changes at this time.

4.2.2 The Columbia River Crossing project

Some committee members presented concern with the layout of the fiscal year 2009 appropriations request list; specifically in regards to the Columbia River Crossing project requests. The committee decided to remove the "grand total" line from the request list in order to clarify the projects were not organized by priority.

5. COMMITTEE OPERATIONS

5.1 JPACT Agenda Planning for 2008

Chair Burkholder briefly overviewed the proposed 2008 JPACT work program. The committee determined the following items should be added to the work program:

- Research on the regional district concept
- Proposal on common strategy on transportation finance
- Coordination on a state strategy
- Develop ballot measure for 2009
- Define the regional system and responsibilities at the local, regional and state levels
- Coordination of reauthorization strategy
- System level modeling scenarios
- Portland to Milwaukie Locally Preferred Alternative

The committee discussed having a joint MPAC and JPACT meeting to discuss the urban reserves in the spring 2008. Staff will follow-up with potential dates.

In addition, Mr. Cotugno stated that the committee would have a policy discussion on the direction of the 2010-13 MTIP cycle at their February 14th meeting.

5.2 Meeting Date (Second Thursday at 7:30 a.m.?)

The committee decided not to change the standing JPACT meeting date and time.

Commissioner Wheeler reminded the committee that the Multnomah County Board of Commissioners meetings begin at 9:00 a.m.

6. ADJOURN

Seeing no further business, Chair Burkholder adjourned the retreat at 1:53 p.m.

Respectfully submitted,

Kelsey Newell
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR FEBRUARY 1, 2008

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

ITEM	TOPIC	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
2.1	PowerPoint	1/2008	Regional Transportation: Public Opinion Survey Report presented by Adam Davis	020108j-01
2.2.1	Calendar	1/10/08	Transportation funding calendar	020108j-02
2.2.2	Chart	1/2008	Recently passed or currently contemplated local transportation funding initiatives in Clackamas, Multnomah and Washington Counties	020108j-03
2.2.4	Handout	1/31/08	Funding responsibilities for different elements of the regional transportation system	020108j-04
2.2.5	Handout	N/A	List of Governor's subcommittees and Vision Subcommittee timeline	020108j-05
2.2.6	Handout	1/17/08	Metropolitan regional principles	020108j-06
4.1.1	Report	12/2007	Report of the National Surface Transportation Policy and Revenue Study Commission	020108j-07
4.1.2	Memo	1/31/2008	To: JPACT From: Olivia Clark RE: "Outside the Bob" Visits to D.C.	020108j-08
4.1.2	Handout	N/A	Recommendations on federal transportation policy from the region that works	020108j-09
4.2.2	Resolution	1/2008	Resolution No. 08-3891 and corresponding exhibit A and staff report	020108j-10
4.2.2	Chart	2007	Fiscal year 2008 appropriation request list	020108j-11
5.1	Work Plan	1/24/08	DRAFT summary of the 2008 OTC work plan	020108j-12
5.1	Work Program	1/2008	2008 JPACT work program	020108j-13



METRO

Joint Policy Advisory Committee on Transportation

MINUTES

February 14, 2008
7:30 a.m. – 9:00 a.m.
Council Chambers

MEMBERS PRESENT

Rex Burkholder, Chair
Sam Adams
James Bernard
Rob Drake
Fred Hansen
Kathryn Harrington
Robert Liberty
Lynn Peterson
Roy Rogers
Jason Tell
Paul Thalhofer
Don Wagner
Ted Wheeler
Bill Wyatt

AFFILIATION

Metro Council
City of Portland
City of Milwaukie, representing Cities of Clackamas Co.
City of Beaverton, representing Cities of Washington Co.
TriMet
Metro Council
Metro Council
Clackamas County
Washington County
Oregon Department of Transportation (ODOT - Region 1)
City of Troutdale, representing Cities of Multnomah Co.
Washington DOT
Multnomah County
Port of Portland

MEMBERS EXCUSED

Dick Pedersen
Royce Pollard
Steve Stuart

AFFILIATION

DEQ
City of Vancouver
Clark County

ALTERNATES PRESENT

Nina DeConcini
Dean Lookingbill

AFFILIATION

DEQ
SW RTC

GUESTS PRESENT

Kenny Asher
Dan Bates
Shame Bemis
Jack Burkman
Roland Chapowski
Olivia Clark
Danielle Cowan
Shirley Craddick
Jef Dalin

AFFILIATION

City of Milwaukie
City of Portland
City of Gresham
WSDOT
City of Portland
TriMet
Clackamas County
Gresham City Council
City of Cornelius

Jonathan David	City of Gresham
Elissa Gertler	Clackamas County
Kristin Hall	CH2M Hill
Kami Kemoe	Clackamas County
Richard Krikava	Office of Senator Gordon Smith
Susie Lahsene	Port of Portland
Tom Markgraf	CRC
Sarah Masterson	Office of Congressman Earl Blumenauer
Neil McFarlane	TriMet
Mary R. Moller	PSU
Dennis Mulvihill	Washington County
Sharon Nassett	ETA
Dave Nordberg	DEQ
Lawrence Odell	Washington County
Louis Ornelas	Citizen
Ron Papsdorf	City of Gresham
Phillip Parker	W.A.S.T Transportation Committee
Dylan Rivera	The Oregonian
Karl Rohde	Bicycle Transportation Alliance
Karen Schilling	Multnomah County
Phil Selinger	TriMet
Randy Shannon	City of Damascus
Paul Smith	City of Portland
Rian Windsheimer	ODOT

STAFF

Andy Cotugno, Ted Leybold, Josh Naramore, Kathryn Sofich, Caleb Winter, Randy Tucker, Richard Brandman, Mark Turpel, Kelsey Newell

1. CALL TO ORDER

Chair Rex Burkholder declared a quorum and called the meeting to order at 7:30 a.m.

2. INTRODUCTIONS

Chair Burkholder welcomed Metro Councilor Kathryn Harrington to the committee.

3. CITIZEN COMMUNICATIONS

There were none.

4. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

Chair Burkholder distributed an updated memorandum highlighting six deliverables addressed at the February 1st JPACT Retreat. With the committee's support, Chair Burkholder directed staff to develop work plans, roles, responsibilities and timelines for each deliverable. (All handouts included as part of the meeting record.)

Chair Burkholder also referred to an updated draft resolution regarding sustainability and climate change. He highlighted four differences between the resolution versions: 1) adoption of a standard definition of sustainability; 2) development of a regional climate action plan; 3) sharing operational and planning actions; and 4) Metro's internal efforts towards sustainability. The committee will discuss the resolution at their next regular meeting.

Commissioner Lynn Peterson proposed the development of a regional transportation authority subcommittee. The subcommittee, to be chaired by the three counties, would be charged with developing a long-term comprehensive governance and funding mechanism that would provide the region the opportunity to build and maintain infrastructure projects in the RTP. JPACT members supported the establishment of the subcommittee. Councilor Robert Liberty, Mr. Jason Tell and Mayor Paul Thalhoffer volunteered to be part of the subcommittee.

Councilor Liberty reminded members that Mr. Oliver Jones is scheduled to speak on February 25th at 7:30 p.m. at the Metro Regional Center as part of the Transportation Speaker Series. In addition, Chair Burkholder encouraged members to attend the infrastructure workshop scheduled for February 22nd at the Oregon Convention Center.

5. CONSENT AGENDA

Consideration of the JPACT minutes for February 14, 2008

MOTION: Mayor Rob Drake moved to approve the consent agenda.

ACTION TAKEN: With all in favor, the motion passed.

6. ACTION ITEMS

6.1 Resolution No. 08-3901, For the Purpose of Amending the Joint Policy Advisory Committee on Transportation (JPACT) Bylaws

Mr. Andy Cotugno briefly updated the committee on the proposed changes to the JPACT bylaws. (Handout include as part of the meeting record.) He stated that the majority of the proposed changes were minor, including updates to the boundary of the MPO, appointment procedures, references to the STIP and chair voting responsibilities. Other proposed changes included language clarifying the role of the Clackamas County and Cities of Clackamas County seats as representative of transit districts in Clackamas County and TriMet's role as regional transit representative and their obligation for coordination with SMART.

MOTION: Mr. Fred Hansen moved, Mayor Drake seconded, to approve the JPACT Bylaw amendments.

ACTION TAKEN: With all in favor (Drake, Bernard, Thalhoffer, Lookingbill, Peterson, Liberty, Wheeler, Tell, DeConcini, Wyatt, Hansen, Rogers and Wagner), the motion passed with the required 2/3^{ds} minimum vote.

6.2 Resolution No. 08-3891, For the Purpose of Approving Portland Regional Federal Transportation Priorities for Federal Fiscal Year 2009 Appropriations

Mr. Cotugno reviewed the updates to Resolution No. 08-3891 appropriation request list. Highlighted changes included:

- South Corridor I-205/Portland Mall LRT Project: Request increased to \$81.6 M
- I-5/205 Interchange: Request increased to \$3 M
- I-5/Hwy 99W Connector: Request decreased to \$4.3 M
- Columbia River Channel Deepening: Request increased to \$36 M
- I-5/Hwy 99W Connector: Purpose updated to include PE, EIS and right-of-way
- NE Cully Blvd. Street Improvement: Source updated to include TCSP
- Eastside Burnside/Couch Couplet: Source updated to include TCSP
- Hwy 217 Beaverton Hwy to Allen Blvd. Interchange: request removed from the list

Commissioner Roy Rogers requested that the Highway 217 Beaverton Highway to Allen Boulevard project be reinstated on the appropriations request list.

MOTION: Mr. Hansen moved, Mayor Drake seconded, to approve Resolution No. 08-3891.

AMENDMENT: Commissioner Rogers moved, Mayor Drake seconded, to amend the appropriations request list to include the Highway 217 project.

Discussion on amendment: Mayor Drake emphasized the importance of the project to the east and west counties. He encouraged members to take ownership and stay committed to the roadway.

ACTION TAKEN: With all in favor and one opposed (Robert Liberty) the amendment passed.

Discussion on motion: Councilor Liberty expressed concern with projects competing for limited funds.

ACTION TAKEN: With all in favor, the motion passed.

6.3 Approval of Federal Transportation Reauthorization Principles

Chair Burkholder briefly overviewed the recommended federal transportation policy principles. The principles will help illustrate the region's story and approach to transportation funding to federal policy makers during reauthorization.

MOTION: Councilor Liberty moved, Mr. Hansen seconded, to adopt the federal transportation policy sheet.

Discussion on motion: Commissioner Peterson recommended that dates be added to clarify the statement, "Went from 180 bad air days to zero" on the handout. In addition, Ms. Nina DeConcini recommended that Carbon Monoxide and Ozone be labeled.

Commissioner Ted Wheeler requested that handout be updated to correctly read, "...focus their upcoming transportation policy decisions and action on these ~~three~~five areas".

ACTION TAKEN: With all in favor, the motion passed.

6.4 Approval of State Transportation Financing Principles

Chair Burkholder briefly introduced Resolution No. 08-3921, which would endorse regional priorities for state transportation funding legislation. The metropolitan region principles will help establish funding strategies and goals for a 2009 funding package.

MOTION: Mayor Jim Bernard moved, Mayor Thalhoffer seconded, to approve Resolution No. 08-3921.

Discussion on motion: Mr. Hansen recommended the following changes to that Exhibit A:

- 1) "Allow and encourage ~~different~~creative approaches and funding mechanisms to meet differing needs of Oregon's state, regional and local transportation systems."
- 2) "Allocate sufficient funds to address critical safety needs in communities statewide, and to support the maintenance and preservation of new and existing transportation facilities; ~~which represent a multibillion dollar investment by the citizens of Oregon.~~"

Some committee members were concerned that the importance of the metropolitan region's special needs and interest in urban areas were not highlighted in the document. Mr. Cotugno recommended that principles include the language "Recognize the significance of the needs of the six designated metropolitan areas" to help clarify. The committee agreed that additional language be included in the document, but asked the legislative staff to draft language.

Additional committee discussion included maintaining flexibility of the distribution formula.

ACTION TAKEN: With all in favor, the motion passed.

6.5 Recommendation to Oregon Transportation Commission on Reductions to the ODOT Region 1 Modernization Program

Mr. Tell stated that in order to resolve a shortfall in modernization funds, the Oregon Transportation Commission (OTC) has directed that the modernization portion of the approved 2008-11 STIP be reduced by \$70 million. Of that total, ODOT Region 1 is expected to reduce their modernization allocations by \$26 million. The OTC is scheduled to take action and amend the STIP at the committee's March meeting.

Commissioner Rogers expressed concern with the distribution of funding cuts. He asked that ODOT provide information on the region's funding contributions/investments. Mr. Tell indicated that staff would schedule a meeting between JPACT members/Washington County staff and ODOT's Salem staff to discuss this issue directly.

Additional committee discussion included the US 26 Veneer Lane to Paha Loop. The committee needed clarification on implementation of safety improvements to date (e.g. cable barriers) and

planned for the future. Mr. Tell indicated that despite proposed cuts, ODOT is taking precautionary measures including establishing the roadway as a safety corridor and continued coordination with local law enforcement and safety committees.

ACTION TAKEN: With all in favor, the committee approved ODOT Region 1's recommendation to the OTC on Region 1 proposed modernization reductions. The recommendation passed.

7. INFORMATION / DISCUSSION ITEMS

7.1 Resolution No. 08-3911, For the Purpose of Approving the Air Quality Conformity Determinations for the Federal Component of the 2035 Regional Transportation Plan and Reconfirming the 2008-11 Metropolitan Transportation Improvement Program (MTIP)

Mr. Cotugno briefly presented Resolution No. 08-3911 which would approve the air quality conformity determination for the federal component of the 2035 RTP as well as reconfirm the 2008-11 MTIP. He indicated that the Carbon Monoxide motor vehicle emissions are significantly less than the set standards and were forecasted to continue to reduce between 2008 and 2035 and consistently remain under the maximum allowed levels. Additionally, Mr. Cotugno stated that region meets the requirements for the minimum miles of bike, pedestrian and transit improvements as well as the self imposed requirements to report for Ozone and air toxic emissions. The public comment period closes February 20th. TPAC, JPACT and the Metro Council will take action on the resolution on February 22nd, 26th (by electronic ballot) and 28th respectively.

Ms. DeConcini will present information on air toxics and their effects on the region at an upcoming JPACT meeting.

7.2 MTIP Policy Direction for 2010-13 MTIP

Mr. Ted Leybold briefly presented the initial results of 2010-13 MTIP policy survey distributed to JPACT and the Metro Council. The survey was used to gather information on jurisdiction and agency perspectives on how to shape the policy direction of the upcoming MTIP. The survey addressed policy and administrative issues as well as ODOT administered, regional flexible and transit funds. (All handouts included as part of the meeting minutes.)

Mr. Tell requested clarification on how the survey response concerning the use of regional flexible funds for project development work was reflected in the policy issue memorandum. Commissioner Sam Adams asked whether an outcomes-based evaluation was an option being considered as one of the possible changes to the technical process.

The committee agreed that further discussion on the 2010-13 MTIP process was necessary and that an additional JPACT meeting was needed to address the policy direction for the next cycle. The committee tentatively agreed on February 28th for the special meeting. Staff will confirm the date and time.

8. ADJOURN

Seeing no further business, Chair Burkholder adjourned the meeting at 9:02 a.m.

Respectfully submitted,

Kelsey Newell
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR FEBRUARY 14, 2008

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

ITEM	TOPIC	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
4.0	Memo	2/14/08	To: JPACT From: Rex Burkholder RE: JPACT Retreat Deliverables	021408j-01
4.0	Resolution	N/A	Draft resolution regarding sustainability and climate change.	021408j-02
4.0	Handout	2/13/08	Regional transportation authority subcommittee proposal submitted by Clackamas County.	021408j-03
4.0	Chart	2/08	JPACT agency responses for the transportation funding calendar exercise at the Feb. 14 th JPACT retreat.	021408j-04
4.0	Chart	2/08	JPACT local government responses for the transportation funding calendar exercise at the Feb. 14 th JPACT retreat.	021408j-05
6.2	Resolution	2/08	Resolution No. 08-3981 with updated exhibit A.	021408j-06
6.3	Resolution	2/08	Draft Resolution No. 08-3921 and exhibit A.	021408j-07
7.1	Report	1/18/08	Public Review Draft of the Air Quality Conformity Determination Plan for the 2035 RTP and 2008-11 MTIP.	021408j-08
7.3	Memo	2/12/08	To: JPACT, MPAC and Metro Council From: Ted Leybold RE: Draft policy issues for 2010-13 MTIP	021408j-08



METRO

Joint Policy Advisory Committee on Transportation

MINUTES

February 28, 2008

7:30 a.m. – 9:00 a.m.

Room 370A/B

MEMBERS PRESENT

Robert Liberty, Interim Chair
James Bernard
Rob Drake
Lynn Peterson
Jason Tell
Paul Thalhofer
Ted Wheeler

AFFILIATION

Metro Council
City of Milwaukie, representing Cities of Clackamas Co.
City of Beaverton, representing Cities of Washington Co.
Clackamas County
Oregon Department of Transportation (ODOT - Region 1)
City of Troutdale, representing Cities of Multnomah Co.
Multnomah County

MEMBERS EXCUSED

Rex Burkholder, Chair
Sam Adams
Fred Hansen
Kathryn Harrington
Dick Pedersen
Royce Pollard
Roy Rogers
Steve Stuart
Don Wagner
Bill Wyatt

AFFILIATION

Metro Council
City of Portland
TriMet
Metro Council
DEQ
City of Vancouver
Washington County
Clark County
Washington DOT
Port of Portland

ALTERNATES PRESENT

Nina DeConcini
Neal McFarlane

AFFILIATION

DEQ
TriMet

GUESTS PRESENT

Kenny Asher
Danielle Cowen
Cam Gilmour
Elissa Gertler
Tom Markgraf
Dennis Mulvihill
Sharon Nassett
Dave Nordberg
Lawrence Odell

AFFILIATION

City of Milwaukie
Clackamas County
Clackamas County
Clackamas County
Markgraf & Assoc.
Washington County
ETA
DEQ
Washington County

Ron Papsdorf
Paul Smith

City of Gresham
City of Portland

STAFF

Andy Cotugno, Robin McArthur, Kim Ellis, Kathryn Sofich, Amy Rose, Josh Naramore, Ted Leybold, Tom Kloster, Kelsey Newell

1. CALL TO ORDER

Interim Chair Robert Liberty called the meeting to order at 7:36 a.m.

2. INTRODUCTIONS

Interim Chair Liberty asked all members and attendees to introduce themselves.

3. CITIZEN COMMUNICATIONS

Ms. Sharon Nassett: Ms. Nassett reminded members that no decision on federal funding has been made for the Columbia River Crossing project. She encouraged those attending the annual appropriation Washington, DC trip to push for freight and infrastructure for the economy. Ms. Nassett stated that the Clark County Neighborhood Association recently held a forum to inform the public of light rail and the project. She indicated that the majority of attendees were in opposition to light rail and conversely wanted a third bridge. As such, the group has developed a referendum in opposition to the project. In addition, Ms. Nassett indicated that the public would ask JPACT, Metro and local jurisdictions to participate in a series forums to discuss property impacts and displacement.

4. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

There were none.

5. ACTION ITEMS

5.1. **Resolution No. 08-3916, For the Purpose of Adopting the Policy Direction and Program Objectives of the 2009 Regional Flexible Funding Allocation Process and 2010-2013 Metropolitan Transportation Improvement Program (MTIP)**

Mr. Andy Cotugno briefly outlined the draft 2010-13 Metropolitan Transportation Improvement Program (MTIP) Portland Metropolitan Area Policy Report. (Handout included as part of the meeting record.) The draft report focused on policy discussion questions for MTIP's three funding categories: Regional Flexible, ODOT Administered and Transit funds. The committee is scheduled to take action on Resolution No. 08-3916 and the corresponding report at their March 13th meeting.

Regional Flexible Funds

Two-step Process

Mr. Ted Leybold stated that TPAC recommended simplifying the MTIP process by carrying out the two-step process; allocating regionally administered programs in step one and local projects in step two. The technical committee identified five programs to be considered for funding in step one: Transit Oriented Development (TOD), Regional Travel Options (RTO), Intelligent Transportation Systems (ITS), Metro Regional Planning, and High Capacity Transit (HCT) Implementation. The remaining funds identified would be available for financing local projects and programs. Staff will provide scenarios and historical information on prior MTIP allocations for each of the regionally administered programs.

Commissioner Ted Wheeler requested that the Willamette River Bridges be included in the first step of the allocation process. He indicated that Multnomah County staff would provide additional language for the policy report. Commissioner Lynn Peterson recognized and supported Multnomah County's concern about the bridges, but was concerned by the limited MTIP finances. She emphasized the needs of the local communities, the 2040 goals and concepts and the positive impact MTIP funds have on bike and pedestrian programs. She felt that new funds should be raised for the bridges.

Mr. Jason Tell recommended that in addition to the HCT and ITS programs, regionally significant bridges and bike and pedestrian programs should be considered for funding in the first step of the allocation process.

Additional committee discussion included clarification on the approved ITS allocations, the state's Federal Highway Bridge Replacement and Repair (HBR) program funding and the importance of establishing a clear definition of regional projects.

Policies Priorities from Outreach

Mr. Leybold briefly overviewed the RTP policies identified by JPACT, the Metro Council, MPAC, TPAC, MTAC and the general public as priorities for guiding the investment of regional flexible funds. He highlighted three new policies under RTP Goal 6: Promote environmental stewardship and Goal 7: Enhance human health as priorities from the public outreach. The new policies target lower carbon emissions and reduction of surface coverage, storm water runoff and pollution impacts to residents.

Committee members requested language be changed for Goal 6 policy, "Reduce-impervious surface coverage and storm water runoff" to clarify that as applied to the allocation process for new facilities, the policy should be to minimize the impacts. In addition, Commissioner Peterson recommended language be added to address the cost effectiveness of projects in developing and emerging communities; highlighting that communities are in different states of development of the region's 2040 goals and different adjustment levels. Staff will update the policy document to incorporate this recommendation.

Proposed Policies

Mr. Leybold briefly overviewed the allocation process policy objectives and the project evaluation policies. He highlighted TPAC's recommendation to encourage the application and funding of projects that efficiently and cost effectively make use of federal funds. In particular, administering funds to projects that are adequately funded from project development to construction and are of a minimum cost ensures an efficient expenditure of staff resources and funds used for administrative purposes such as documentation of meeting federal environmental and right-of-way regulations.

In addition, Mr. Leybold briefly outlined the development of the policy objectives into the evaluation criteria for local projects in step two of the overall process. He highlighted the three-tier structure for identifying project priority for the 2040 target areas.

Some committee members were concerned with the lack of funding and development opportunities at the local level. Additional discussion included project leverage, definition of regional town centers and funding for projects in the second or third tier.

ODOT Administered Funds

Prioritization Factors and Project Eligibility Criteria

Mr. Leybold briefly referred to ODOT's newly adopted prioritization factors and eligibility criteria for the 2010-13 STIP. He overviewed the two comments received.

Mr. Tell requested clarification on what the proposed local policy considerations meant and how they would be used to create prioritization criteria for the next STIP cycle; specifically if the proposed criteria would help distinguish between projects. Mr. Leybold stated he would consult with TriMet and ODOT staff to provide clarification on the proposed language.

8. ADJOURN

Seeing no further business, Interim Chair Liberty adjourned the meeting at 8:54 a.m.

Respectfully submitted,

Kelsey Newell
Recording Secretary

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE)	RESOLUTION NO. 08-3916
POLICY DIRECTION AND PROGRAM)	
OBJECTIVES FOR THE 2009 REGIONAL)	Introduced by Councilor Rex Burkholder
FLEXIBLE FUNDING ALLOCATION PROCESS)	
AND 2010-13 METROPOLITAN)	
TRANSPORTATION IMPROVEMENT)	
PROGRAM (MTIP))	

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council will be awarding regional flexible funds to transportation projects in the region through the Regional Flexible Fund allocation process; and

WHEREAS, these funding awards, as well as all other federal transportation spending in the region, will be programmed in the MTIP; and

WHEREAS, JPACT and the Metro Council wish to provide policy direction on the objectives of the Regional Flexible Funding process and programming of funds in the MTIP; now therefore,

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT for the policy direction, program objectives, procedures and criteria for the 2009 Regional Flexible Fund allocation process and the 2010-13 Metropolitan Transportation Improvement Program as described in Exhibit A attached hereto as to form.

ADOPTED by the Metro Council this ____ day of March 2008.

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

2010-13 Metropolitan Transportation Improvement Program Portland Metropolitan Area Policy Report

Introduction

The Metropolitan Transportation Improvement Program (MTIP) schedules the distribution of all federal and some state transportation funds in the Portland metropolitan region over a four-year period. To be eligible for the MTIP, projects or programs must be in the financially constrained list of the Regional Transportation Plan (RTP).

MTIP funds are administered in the Portland metropolitan region by four agencies: the Oregon Department of Transportation (ODOT), TriMet, South Metro Area Rapid Transit (SMART) and Metro. Each agency receives its own pot of funds from specific federal sources. Most of the funds administered by ODOT and the transit agencies are dedicated to investments that fall into specific categories. The funds administered by Metro are more flexible. These funds—dubbed "Regional Flexible Funds"—may be invested more broadly. Locally administered transportation funds are not programmed in the MTIP, but may be listed for informational purposes.

The table below summarizes the main federal funding sources for each agency and the types of investments they support. A graph on the back of this sheet shows the proportion of federal and state funds invested in different programs and projects as administered by these agencies. The federal funds administered by ODOT are supplemented with state transportation revenues.

Figure 1

AGENCY	FEDERAL FUND TYPE	USES
ODOT	Federal Highway Administration (FHWA) Trust Fund <ul style="list-style-type: none"> • Interstate Maintenance • Surface Transportation Program • National Highway System (NHS) • Bridge funds • Safety funds • High-Priority Projects (Congressional earmarks) • Transportation enhancements 	<ul style="list-style-type: none"> • Preservation (resurfacing) of the interstate highway system • Highway preservation (resurfacing) • Operations (signs, signals, traffic management) • Highway modernization (widening) • Modernization on NHS designated routes • Reconstruction or preservation on NHS routes • Operational improvements on NHS routes • Building and maintaining state and local bridges • Crash reduction and highway safety • Special projects; highway modernization (widening) • Highway appearance/function; historic preservation
TriMet/SMART	Federal Transit Administration	

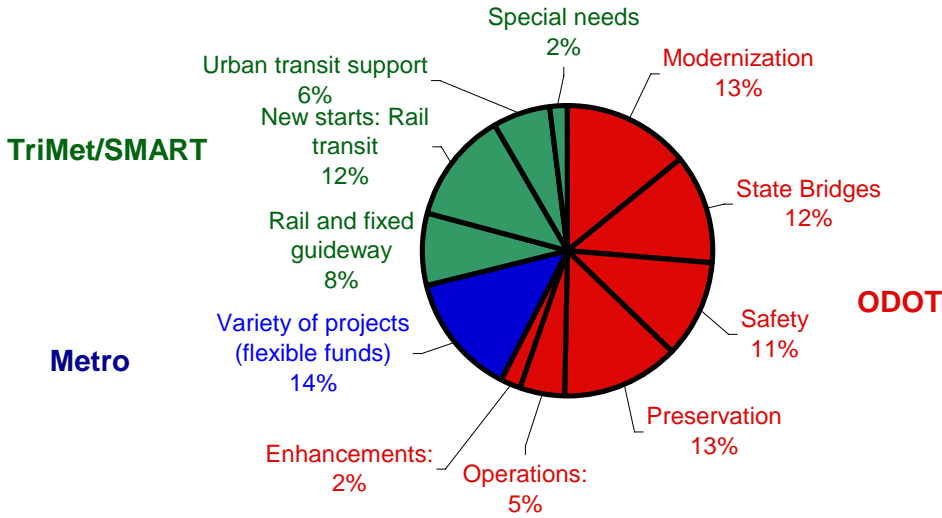
- New Starts/Small Starts
- Transit Formula Funds
- Rail and bus maintenance
- Special needs grants
- New passenger rail or bus rapid transit
- Urban transit support
- Refurbishing existing passenger rail systems and bus fleets
- Transit services for elderly, disabled and low-income people

Metro	FHWA Trust Fund
	<ul style="list-style-type: none"> • Congestion Mitigation/Air Quality • Surface Transportation Program • Projects that improve air quality • Anything but construction of local streets

Fund and investment distribution

The graph below shows the relative amounts and general types of federal and state transportation investments that are administered by ODOT, TriMet and Smart, and Metro. Please note that the relative proportions shown in this graph are based on recent historical averages to give a sense of how funding has generally been allocated.

Figure 2



NOTE: The Metro region covers urban portions of Clackamas, Multnomah and Washington Counties. ODOT funds are for all of ODOT Region 1, which covers those three counties plus Columbia and Hood River counties. The ODOT enhancement portion reflects a statewide total. ODOT funding does not include federal earmarks, Connect Oregon, OTIA, FTA-administered, or local government pass through funding.

Regional Flexible Funds

Two federal funding programs are used to create the pool of funding known as Regional Flexible Funds that are allocated through the Metropolitan Planning Organization decision-making process. Those federal programs are Urban Surface Transportation Program (Urban STP), which can be used for any purpose other than construction of local streets, and Congestion Mitigation/Air Quality (CMAQ) that need to be used on projects that demonstrate an air quality benefit to the region.

The following draft policies are a consolidation of priorities identified by a majority of survey respondents of JPACT and Metro Council members and through consultation of MPAC, JPACT and the Metro Council for guiding the investment of regional flexible funds. See Attachment A for the complete list of RTP policies from which these policies were identified. The source of the policy priorities and how they relate to existing regional flexible fund policies are noted.

Existing Transportation Policies Identified as Priorities During Outreach Process

The following 2008-11 MTIP policies and Regional Transportation Plan goal objectives were identified by a majority of survey respondents of JPACT and Metro Council members, through consultation of MPAC, JPACT and the Metro Council and through a target survey of community stakeholders as priorities for guiding the investment of regional flexible funds.

RTP Goal 1: Foster vibrant communities and efficient urban form

- Prioritize transportation projects and services that address system gaps or deficiencies to improve multi-modal access in primary 2040 target areas (central city, regional centers, industrial areas and passenger and freight inter-modal facilities).

RTP Goal 2: Sustain economic competitiveness

- Prioritize reliable movement of freight and goods on the RTP regional freight system.
- Prioritize addressing gaps in multi-modal access to labor markets and trade areas within or between 2040 target areas.

RTP Goal 3: Expand transportation choices

- Prioritize addressing gaps in the pedestrian, bicycle and transit networks.
- Ensure air quality Transportation Control Measures for pedestrian and bicycle improvements are met.

RTP Goal 4: Emphasize efficient management of the transportation system

- Prioritize investments in Transportation System Management and Operations (TSMO) in regional mobility corridors.

RTP Goal 5: Enhance safety and security

- Prioritize investments in recurring safety issue areas, including gaps in the bike and pedestrian system.

RTP Goal 6: Promote environmental stewardship

- Reduce impervious surface coverage and storm water runoff.
- Prioritize projects and services that lower carbon emissions.

RTP Goal 7: Enhance human health

- Reduce noise, impervious surface and other transportation-related pollution impacts on residents.

RTP Goal 8: Ensure Equity

- Prioritize investments that provide access to transportation options for people of all ages, abilities and incomes.

RTP Goal 9: Ensure fiscal stewardship

- Prioritize investments that achieve multiple objectives.

Existing Regional Flexible Funding Goals

- Select projects from throughout the region, however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
- Prioritize projects and programs that do not have other dedicated sources of revenue available.
- Allow use for project development and local match to support funding efforts from other sources for large projects (for example, Sellwood Bridge, light rail transit projects, I-5/Nyberg interchange) when there is strong potential to leverage other sources of discretionary funding.

Allocation Policies

The allocation policies are a consolidation of the *Policy Priorities from Outreach* objective statements as they will be applied to guide the allocation of regional flexible funds (the RTP Policy objectives were written as objectives for the entire transportation system). The allocation policies are subdivided into policies that guide allocation process (*Process policy objectives*) and policies that guide the evaluation of projects and program services (*Project and program services policy objectives*).

Process policy objectives: these objectives define how the allocation process should be conducted and what outcomes should be achieved with the overall allocation process.

1. Select projects from throughout the region, however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring air quality Transportation Control Measures for pedestrian and bicycle improvements are met and that an adequate pool of CMAQ eligible projects are available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage the application and funding of projects that efficiently and cost effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an areas stage of development (developed, developing, undeveloped) consistent with RTP Table 3.2.

Project and program services policy objectives: these objectives define the objectives against which project and program services should be evaluated and prioritized for funding.

8. Prioritize transportation projects and program services that:
 - a. retain and attract housing and jobs by addressing system gaps or deficiencies to improve multi-modal access in primary 2040 target areas (central city, regional centers, industrial areas and passenger and freight inter-modal facilities) as the highest priority, secondary areas (employment areas, town centers, main streets, station communities and corridors) as next highest priority, and other areas (inner and outer neighborhoods) as the lowest priority.
 - b. address gaps and deficiencies in the reliable movement of freight and goods on the RTP regional freight system, and transit, pedestrian and bicycle access and inter-modal connections to labor markets and trade areas within or between 2040 target areas (Primary areas are highest priority, Secondary areas are next highest priority, other areas are lowest priority).
 - c. provide access to transportation options for underserved populations (low income and minority populations and elderly and people with disabilities).
 - d. invest in Transportation System Management and Operations (TSMO) in regional mobility corridors.

- e. address recurring safety issues, including gaps in the bike and pedestrian system.
- f. minimize noise, impervious surfaces, storm-water run-off and other pollution impacts.
- g. reduce and minimize energy consumption, carbon emissions and other air pollution impacts.
- h. the project mode of program service type has no other or limited sources of transportation-related funding dedicated to or available for its use.

Policy and Program Administration Implementation Tools

Metro staff will develop a project solicitation packet and supporting material as described within each administrative tool summarized below. Metro staff will consult with TPAC on the development of these tools to implement both the policy objectives adopted by JPACT and the Metro Council and to implement administrative responsibilities for carrying out federal regulations, Regional Transportation Plan policies and efficient delivery of projects and programs.

Eligibility & Screening Criteria

Eligibility criteria are used to ensure applicant projects meet federal rules for funding eligibility (e.g. projects are in or can easily be amended into the RTP) and meet public involvement criteria. The criteria also ensure applicant agencies are addressing regional planning requirements and that projects from urban growth boundary expansion areas have completed required concept planning. In order to ensure projects are an efficient use of federal funds, minimum costs will be set for project development, final design and engineering and construction as screening criteria. Finally, screening criteria will evaluate projects for their readiness to proceed into final design and engineering, right-of-way and construction or whether the project needs further project development work. (Objectives 4 and 6)

Prioritization Criteria and corresponding Technical Measures used to Evaluate Applicant Projects

These criteria and measures are used to evaluate candidate projects and programs against the program policies as adopted by JPACT and the Metro Council. Quantitative measures balance and weight the policy objectives on a 100-point scale. Additional qualitative policy analysis is provided to describe a projects impact on policy objectives that cannot be quantified in an equitable or useful manner.

Previous criteria and measures were developed around 13 distinct modal evaluation categories and weighted the quantitative measures within each category by: 2040 land use objectives: 40 points, project modal effectiveness: 25 points, safety: 20 points, and cost-effectiveness: 15 points.

Technical staff will develop an updated technical evaluation proposal with the objectives of:

- 1. reducing the number of distinct project evaluation categories,
- 2. consideration of eliminating modal evaluation categories in favor of policy outcome based evaluation categories, and
- 3. developing universal measures that can compare all projects against one another for at least some policy objectives.

The evaluation categories and corresponding weighted score of the quantitative topic areas will be brought back to JPACT for approval.

Funding will be allocated in a two-step process. The first step would be to consider an allocation (either a firm commitment or a recommendation that could be reconsidered at the end of the second step) to programs that are administered at the regional level. These include Metro Planning, High Capacity Transit system completion, the Regional Travel Options program, the Transit Oriented Development program, and the Intelligent Transportation Systems program.

JPACT will consider a proposal by Multnomah County to include a Regional Bridge Program for the allocation of funds during the first step.

The second step would be to solicit locally administered projects and program services based on cost limit targets set relative to the remaining funds available.

Figure 3

As an example, a first step allocation to regionally administered programs could include: Metro Planning, ITS Program (Objectives 6, 8a, b, d, e, f, g) RTO program (Objectives 8a – g), Transit Oriented Development (Objectives 8a, c, d, e, g), High Capacity Transit system completion (Objectives 8a, b, c, d).

Metro staff will consult with TPAC to develop project evaluation categories and measures to implement adopted policy direction. Examples of policy outcome based categories and quantitative measures could include:

<u>Potential project evaluation categories</u>	<u>Potential quantitative topic areas (and measures)</u>
System reliability:	Travel time reliability, 2040 land-use (use of facility by freight vehicles accessing Metro area industrial lands), Safety
System completeness:	Facility importance to regional system (number/size/use of RTP modal system gaps completed), 2040 land-use, Safety
Mixed-use area implementation	2040 land-use (existing and forecasted jobs/housing), Safety

Figure 3 Cont.

Industrial & employment area implementation	2040 land-use (existing and forecasted jobs), Safety
Environmental enhancement & mitigation	Environmental restoration, Emission reduction

Sub-Regional Application Limitations

This tool is currently used to ensure efficient program administration and to ensure a pool of CMAQ eligible projects are available from across the region. (Objectives 3 and 6)

Financial Match Incentives

This tool is currently used to promote the location and service function of projects towards priority 2040 land use areas (Objectives 8a.).

Conditions of Approval

This tool can effectively be used to achieve project design and scope objectives such as consistency with regional street design guidelines and the incorporation of Green Street features. (Objectives 4 and 8f.)

Oregon Department Of Transportation (ODOT) Administered Funds

ODOT administers many sources of federal funding for transportation purposes. These fund sources each have purposes and eligible activities as defined by federal laws and rules. The Oregon Transportation Commission (OTC) assigns these federal fund sources (along with state fund sources) to one of several ODOT Program activity areas. Assignment of federal funds to projects within an ODOT program activity area must still be consistent with federal eligibility rules.

The allocation of federal and state funding sources to ODOT program area is made after an evaluation of needs across the program areas and an assessment of funding eligibility rules. This action is taken by the OTC and is known as the establishment of funding targets.

Each ODOT program area has unique eligibility and prioritization criteria for the prioritization of projects to receive funding to be reflected in the State Transportation Improvement Program (STIP). Projects to be funded within a Metropolitan area must be defined within a Metropolitan Transportation Improvement Program (MTIP). The programming adopted within the MTIP must be adopted without change into the State Transportation Improvement Program (STIP). ODOT is represented on the Metropolitan Planning Organization (MPO) board that adopts the content of the MTIP but must also ensure that the decision process, project eligibility and prioritization criteria adopted by the OTC is followed.

This section of the policy document outlines how the MPO board will come to a recommendation on the content of the MTIP while following the direction of the OTC policies with respect to the ODOT administered funds.

Funding Programs

Federal and state transportation revenues are budgeted into programs to address transportation needs of the state transportation system: Modernization, Bridge, Preservation, Operations, Safety, Enhancements and the Immediate Opportunity Fund. The Enhancement and Immediate Opportunity Fund essentially operate as a competitive application program with objectives set by the OTC.

The Modernization, Bridge and Preservation programs have eligibility and prioritization criteria adopted by the OTC. Those criteria are summarized in the table below and criteria details are provided in Attachment B. JPACT and the Metro Council will base their recommendations on the prioritization of projects in these programs based on these policies. Technical staff will provide an analysis of candidate projects based on these policies.

Prioritization Factors
Used to Select Projects for Funding from the Pool of Eligible Projects

Development STIP Major projects	Construction STIP		
	Modernization projects	Preservation projects	Bridge replacement/rehabilitation projects
<p>Priority shall be given to:</p> <ul style="list-style-type: none"> • D-STIP project suitability (an assessment of the level of work completed to achieve the planned D-STIP milestone). • Projects that best support the policies of the Oregon Highway Plan.² • Projects that have already completed one or more D-STIP milestones. • Projects that have funding identified for development or construction³ • Major Modernization Projects that leverage other funds and public benefits.⁴ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> • Project readiness (an assessment of the likelihood of a project getting to construction in the timeframe contemplated).⁷ • Projects that best support the policies of the Oregon Highway Plan.⁸ • Projects that support freight mobility.⁹ • Projects that leverage other funds and public benefits.¹⁰ • Class 1 and 3 projects that have completed an environmental milestone of a Record of Decision (ROD) or Finding of No Significant Impact (FONSI) (see footnote for Class 2 projects).¹¹ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> • Project readiness (an assessment of the likelihood of a project getting to construction in the timeframe contemplated).¹³ • Projects that best support the policies of the Oregon Highway Plan.¹⁴ • Projects that leverage other funds and public benefits.¹⁵ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> • Projects that support the approved Bridge Options Report. (This prioritization factor is not intended to limit bridge projects to those identified in the Bridge Options Report, but to give priority to those identified in the report.)¹⁷ • Projects that best support the policies of the Oregon Highway Plan.¹⁸ • Projects that support freight mobility.¹⁹ • Project readiness (an assessment of the likelihood of a project getting to construction in the timeframe contemplated).²⁰ • Projects that leverage other funds and public benefits.²¹

**Project Eligibility Criteria and Prioritization Factors
For the 2010-2013 Development STIP and Construction STIP
Eligibility Criteria**

Development STIP Major projects	Construction STIP*		
	Modernization projects	Preservation projects	Bridge replacement/rehabilitation projects
<p>Development work on major projects may be eligible for funding if it:</p> <ul style="list-style-type: none"> ◆ Supports the definition of “Development STIP” approved by the Oregon Transportation Commission ◆ Addresses an unmet transportation need in the applicable acknowledged transportation system plan(s) (TSP) or, in the absence of an applicable acknowledged TSP(s), the applicable acknowledged comprehensive plan and any applicable adopted TSP(s). or Addresses project need, mode, function and general location for a transportation need identified in an acknowledged TSP. or Is identified as a project of statewide significance or as a federal discretionary project. ◆ Has funding adequate to complete the identified milestone.¹ 	<p>Modernization projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> ◆ Are consistent with the applicable acknowledged transportation system plan (TSP) or, in the absence of an applicable acknowledged TSP, the applicable acknowledged comprehensive plan and any applicable adopted TSP.⁵ ◆ Are consistent with the Oregon Highway Plan policy on Major Improvements (Policy 1G, Action 1.G.1), where applicable.⁶ 	<p>Pavement Preservation projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> ◆ Are identified through the Pavement Management System process.¹² 	<p>Bridge replacement and rehabilitation projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> ◆ Are identified through the Bridge Management System process.¹⁶ ◆ Are improvements or work needed to rebuild or extend the service life of existing bridges and structures (includes replacement of an existing bridge).

* To the extent that legislative action (e.g., HB 2041) applies, the criteria in the legislation will control in the event of a conflict.

JPACT and the Metro Council request that the Oregon Highway Plan and the 2012-15 STIP eligibility and prioritization criteria be updated to reflect the new Oregon Transportation Plan, particularly the sustainability policies.

~~Additional local prioritization criteria, consistent with OTC criteria may be considered.~~

~~JPACT and the Metro Council recommend that if technical evaluation measures of the OTC criteria do not already address the following issues: leveraging of other transportation or development related investments, multi-modal impacts, community livability and sustainability impacts, that local prioritization criteria and evaluation measures are developed for consideration of project priorities.~~

Modernization

The statewide funding target for Modernization program projects is further sub-allocated to the five ODOT regions of the state. Metro boundaries, which define the extent of the MTIP, is located within a portion of Region 1. ODOT Region staff work with JPACT and the Metro Council to prioritize modernization projects for funding within a portion of the Region 1 target funds, consistent with federal rules and OTC policies.

The OTC has created the policy framework in Attachment B, consistent with the Oregon Highway Plan, for the decision process to prioritize projects from the Regional Transportation Plan to receive funds.

Specific measures to implement state and local prioritization criteria will be developed to evaluate and prioritize projects for the Modernization program.

Bridge

The OTC has created the policy framework in Attachment B, consistent with the Oregon Highway Plan, for the decision process to prioritize projects to receive funds.

Specific consultation measures with local agencies and the TIP decision process on the scope and schedule of Bridge program projects, as generated by the Bridge management system, is administered by ODOT Region 1 staff.

Preservation

The OTC has created the policy framework in Attachment B, consistent with the Oregon Highway Plan, for the decision process to prioritize projects to receive funds.

Specific consultation measures with local agencies and the TIP decision process on the scope and schedule of Preservation program projects, as generated by the Pavement management system, is administered by ODOT Region 1 staff.

Operations

The Operations Program funds projects that improve the efficiency of the transportation system through the replacement of aging infrastructure and the deployment of technology that allows the existing system to meet increased demands.

The Operations Program consists of four sub-categories:

- (1) Intelligent Transportation Systems (ITS);
- (2) Signs, Signals, and Illumination;
- (3) Slides and Rockfalls; and
- (4) Transportation Demand Management (TDM).

* ITS includes ramp metering, incident management, emergency response/traffic management operations centers, and mountain pass/urban traffic cameras. Region 1 sets aside funds to maintain, improve and complete development of its ITS infrastructure. ODOT coordinates with local agencies in their selection of ITS projects to receive Operations funding through participation in the Transport subcommittee of TPAC.

* Signals and signs, slow moving vehicle turnouts, and other operational improvements. The Region sets aside funds for development and upgrades.

* Rockfalls and slides (chronic rockfall areas and slides, not emergency repair work). Priorities for addressing are based on geotechnical assessments.

* TDM Includes rideshare, vanpool, and park-and-ride programs.

*ODOT Region 1 does not receive any funds for TDM - they are paid directly to Metro

Safety

The OTC has created the policy framework, consistent with the State Safety Action Plan, for the decision process to prioritize projects to receive Safety Program funds.

Specific consultation measures with local agencies and the TIP decision process on the scope and schedule of Safety program projects is administered by ODOT Region 1 staff.

Transit Funds

Transit projects and programs in the region receive federal funding from several different sources. Allocation of these funds are administered through TriMet and SMART in the Metro region and coordinated through activities at their agencies and at the MPO planning and programming process.

Congressional earmarks

Regional priorities for requests of Congressional earmarks are coordinated through JPACT and principles guiding this process are described in the next section below. TriMet and SMART request earmarks as a part of this process.

New Starts discretionary grants

Requests for grants from the Federal Transit Administration for new high capacity transit projects such as light rail, commuter rail, streetcar or bus rapid transit are also coordinated through JPACT with planning for implementation of these projects administered through the TriMet Transit Improvement Plan.

The Federal government offers Section 5309 transit development grants through what is called the New Starts program. That program is subdivided into 1) New Starts, 2) Small Starts and 3) Very Small Starts (pending), each with a threshold for project scale and financing needs. Projects pass through a prescribed development process that incorporates NEPA. Projects are ultimately reviewed and approved for funding against a range of criteria, including a cost- effectiveness measure based on travel time savings. The process is highly competitive.

Light rail projects generally fall under the original New Starts program, but streetcar, commuter rail, bus rapid transit or a short light rail extension might also fit into the lower threshold programs. These projects are necessarily grounded in the Regional Transportation Plan, TriMet's 5- year Transit Investment Plan and the upcoming High Capacity Transit Plan. The Region secured an average of \$65 million in Federal funds annually through this program between 1992 and 2011 (projected).

The region will be undertaking a high capacity transit system plan over the course of the next 18 months whose objectives include the adoption of priorities and funding strategies for the region's high capacity transit system. This plan will be considered for adoption by JPACT and the Metro Council.

Regional flexible fund allocations

TriMet and SMART have received awards of funding through the regional flexible fund allocation process. This includes \$9.3 million per year of regional flexible funds through the year 2015 as a contribution to the I-205/Transit Mall light rail and Wilsonville-Beaverton commuter rail projects, contributions to on-street transit improvements and to

the SMART transit center and park-and-ride facility. TriMet and SMART will continue to compete for project funding from this source in the future.

Operating and Maintenance grants

TriMet and SMART receive federal transit grants, such as the Section 5307 and Section 5309 federal fund programs, to be used for the purposes of transit operations, rail right-of-way maintenance and bus and rail vehicle maintenance. These funds are prioritized to service through the Transit Investment Plan, annual service planning and the annual TriMet and SMART budgets.

Special Needs grants (JARC, New Freedom, Elderly & Disabled programs)

The recommendation for the allocation of special needs transportation funding in the Metro region is developed by the STFAC. Their recommendation is made to the Oregon Public Transit Division of ODOT for allocation of funds. These recommendations must be consistent with the Coordinated Human Services Transportation Plan that in turn is coordinated with the Regional Transportation Plan.

The STFAC recommends the distribution of the New Freedom federal program (Section 5317 funds) for services beyond Americans with Disabilities Act requirements, Jobs Access/Reverse Commute program (Section 5316 funds) to assist low-income households with transportation services to facilitate job access, and the Elderly and Disabled program (Section 5310 funds) to provide transportation services to elderly and disabled populations.

Federal Congressional Earmarks

Regional priorities for federal earmarks are coordinated through a voluntary process at JPACT. The priority list developed through this process is used only for the purpose of organizing the requests from the region to the Oregon Congressional delegation for each annual appropriations bill and each re-authorization bill. Staff recommended guidelines for the 2009 Appropriations requests include:

1. JPACT should establish a regional program for earmarking requests from the transit program.
2. JPACT should endorse earmarks from non-transportation appropriations bills that help further the regional transportation agenda.
3. JPACT should compile a list of requested earmarks from the federal highway bill as follows:
 - a. All earmark requests should be in the financially constrained portion of the RTP.
 - b. Requests should be limited to a dollar amount and category that is appropriate. Based upon historical experience, this means requests should generally be no greater than \$3-5 million.
 - c. Requests should be only for work that can be obligated within the timeframe of this bill, not simply requests to accumulate over multiple bills for a later date. Only ask for projects and project amounts sufficient to complete the next logical step or a finance plan to complete the phase (i.e. enough to complete PE, right-of-way or construction step). Do not allow requests that are simply a partial payment toward one of these steps.
 - d. JPACT should expect the following interests to limit their requests to one or two priorities:
 - Portland
 - Multnomah County and Cities of Multnomah County
 - Clackamas County and Cities of Clackamas
 - Washington County and Cities of Washington County
 - Port of Portland
 - ODOT
 - Metro
 - e. JPACT should structure its project requests being mindful of the Congressional districts in which they are located.

Projects awarded Congressional earmark funding need to be programmed in the Metropolitan and State Transportation Improvement Programs prior to those funds being eligible for the project.

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RTP Policies and 2008-11 MTIP Policies provides as Potential Policy Priorities for the Allocation of Regional Flexible Funds

- 1. Program policy goals and objectives.** Do any of the policy goals and objectives in the 2035 Regional Transportation Plan, summarized below, are there any that warrant prioritization should be priorities for the receipt of Regional Flexible Funds for this funding cycle? Check those that you think should be priorities for these funds relative to the responsibility of other funding sources or agencies. Please check any you believe do.

RTP Goal 1: Foster vibrant communities and efficient urban form

- System gaps or deficiencies to improve multi-modal access in primary 2040 target areas
- Programs that reduce land dedicated to parking

RTP Goal 2: Sustain economic competitiveness

- Gaps in multi-modal access to labor markets and trade areas within or between 2040 target areas
- Intercity public transportation/inter-modal connections
- Reliable movement of freight and goods
- Access to industrial areas
- Multi-modal freight connections (at least two different modes)

RTP Goal 3: Expand transportation choices

- Gaps in bicycle, pedestrian or transit access/inter-modal connections
- Reduction in vehicle miles traveled per capita
- Access to all modes of transportation for underserved populations

RTP Goal 4: Emphasize efficient management of the transportation system

- Investments in Transportation System Management and Operations (TSMO) Concept to improve mobility, reliability and safety in regional mobility corridors
- Incentives, services and infrastructure that uses the TSMO Concept to increase awareness of travel options

RTP Goal 5: Enhance safety and security

- Investments that address recurring safety-related deficiencies on the regional mobility corridor system and gaps in the regional bicycle and pedestrian systems
- Investments that increase system monitoring, management and security to reduce crime

- Investments that increase system monitoring, management and security to address terrorism, natural disasters or hazardous material spills

RTP Goal 6: Promote environmental stewardship

- Improvements to fish or wildlife habitat/barrier removal that limits fish or wildlife passage in a habitat conservation area or wildlife corridor
- Reductions in transportation-related vehicle emissions
- Reduction in impervious surface coverage and stormwater runoff
- Reduction in transportation-related energy and land consumption/reliance on unstable energy sources

RTP Goal 7: Enhance human health

- Investments that encourage walking, bicycling
- Reductions in noise, impervious surface and other transportation-related pollution impacts on residents

RTP Goal 8: Ensure Equity

- Investment that benefit environmental justice communities
- Investments that provide access to transportation options for people of all ages, abilities and incomes

RTP Goal 9: Ensure Fiscal Stewardship

- Investments and strategies for cost-effective maintenance or preservation of existing transportation facilities and services
- Investments that achieve multiple goals and objectives
- Investments that leverage other sources of funding

2. **Funding priority:** Should Metro continue to prioritize Regional Flexible Funds for projects and programs that do not have other dedicated sources of revenue available?

3. **Ensuring compliance with state air quality plan requirements:** The region must build enough new bicycle and pedestrian facilities to meet state air quality plan requirements. (If these requirements are not met, federal funding could be redirected to meet them.) Should Metro continue to ensure that regional flexible funds are used to meet the requirement of funding bicycle and pedestrian facilities?

4. **Supporting large projects that have other potential funding sources:** Should regional flexible funds continue to be used for project development and local match to support funding efforts from other sources for large projects (for example, Sellwood Bridge, light rail transit projects, I-5/Nyberg interchange)?

Attachment B

Project Eligibility Criteria and Prioritization Factors Process Description and Guidance For the 2010-2013 Development STIP and Construction STIP

I. Introduction

The Oregon Transportation Commission (OTC) approved the Project Eligibility Criteria and Prioritization Factors to assist Area Commissions on Transportation (ACTs), Metropolitan Planning Organizations (MPOs), or regional or statewide advisory groups advising the OTC on the selection of Statewide Transportation Improvement Program (STIP) projects. The document gives basic definitions and funding information and provides guidance pertaining to roles and responsibilities, project selection and documentation. More information about the ACT process, advisory committees, Oregon transportation management systems, other STIP programs and funding is available on the Internet (see Appendix A).

The OTC establishes program goals, funding levels and regional funding distribution at the start of each two-year STIP update. Those policy decisions are made separate from these eligibility criteria and prioritization factors and are not part of this document. (See Appendix B for the decision-making process.)

The OTC's decisions reflect the goals and priorities adopted in the Oregon Transportation Plan (OTP). The OTP sets forth policies that guide decisions and actions of the agency, including project and program funding decisions. The OTP's goals are:

1. Mobility and Accessibility
2. Management of the system
3. Economic Vitality
4. Sustainability
5. Safety and Security
6. Funding the Transportation System
7. Coordination, Communication, and Cooperation

These goals recognize the importance of providing an efficient, optimized, safe, secure, and well-integrated multimodal transportation system that allows for access and connectivity throughout the state to enable a diverse economy while not compromising the ability of future generations to meet their needs. These goals are implemented through the Oregon Highway Plan (OHP) and the other modal plans. This document sets forth criteria in compliance with the OHP to be utilized in the selection and prioritization of transportation projects for the D-STIP, and the C-STIP modernization, preservation, and bridge programs.

A. Roles and Responsibilities

The OTC will make the final selections for all projects included in the STIP. The Commission will consider the advice and recommendations received from ACTs, MPOs, and regional or statewide advisory groups. ODOT will provide tools necessary to enable an ACT to carry out its responsibilities under these criteria. Geographic areas that do not have an ACT must adhere to the same standards of accountability as ACTs (*Policy on Formation and Operation of the Area Commissions on Transportation*, Section VI, Basis for Decision Making) and demonstrate to the OTC that recommendations were developed in accordance with these criteria and factors. ODOT region staff will facilitate this by preparing project summary reports that describe the

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1 utilization of the criteria in project selection by the region, ACTs, and/or other groups. They
2 may also utilize or include with the summary reports any other information developed for project
3 analysis or comparison. The reports supplied by each region will be provided to the OTC with
4 the draft STIP. In making final project selections, the OTC will ensure that ACTs, MPOs and
5 regional or statewide advisory groups have based their considerations on the criteria and will
6 ensure projects are distributed according to the funding allocations approved by the OTC for the
7 2008–2011 STIP.

8
9 In making decisions, the OTC applies both regional and statewide perspective, optimizes
10 system effectiveness in decisions for the state system and strives to develop and operate an
11 integrated intermodal transportation system that facilitates the safe, efficient and economic
12 movement of people and goods. (*Policy on Formation and Operation of the Area Commissions
13 on Transportation*, Section III. Authority)

14 15 **B. Definitions**

16
17 STIP includes both the Development and Construction sections of the Statewide Transportation
18 Improvement Program. The D-STIP houses projects that require more than 4 years to develop
19 or for which construction funding needs to be obtained. Projects that can complete the
20 development process and be ready for bid within 4 years or less may be placed directly into the
21 C-STIP.

22 23 Development STIP (D-STIP)

24
25 The Oregon Transportation Commission approved the following definition for the D-STIP:

26
27 *Projects approved and funded for development through specific milestones and within
28 specific timeframes, which include the following characteristics:*

- 29
30 A. *Projects approved for funding through specific milestones such as National
31 Environmental Policy Act (NEPA) design-level environmental documents,
32 right of way acquisition, and final plans; or*
33
34 B. *Projects for which needed improvements have been identified but a final
35 solution either has not been determined or needs further design and analysis.*

36
37 *The types of projects that tend to have one or more of the above characteristics include
38 statewide significant projects, federal earmark or demonstration projects, modernization
39 or major bridge replacement projects, and discretionary projects (projects eligible to
40 receive federal discretionary funds).*

41 42 Construction STIP (C-STIP)

43
44 The C-STIP identifies project scheduling and funding for the state's transportation preservation
45 and capital improvement program for a four-year construction period. This program meets the
46 requirements of the Safe, Accountable, Flexible, Efficient Transportation Equity Act – a Legacy
47 for Users (SAFETEA-LU), the federal act that provides funds to states for transportation
48 projects. For application of these criteria and prioritization factors, C-STIP means
49 Modernization, Preservation and Bridge projects.

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1 Other STIP Programs

2
3 Other STIP programs (examples include Safety, Operations, Bicycle/Pedestrian, Transit,
4 Congestion Mitigation/Air Quality Improvement, Transportation Enhancement, and Scenic
5 Byways) are not addressed in this document. More information about programs funded in the
6 STIP is available in the *Draft 2008-2011 STIP*.

7 8 **C. Project Selection**

9
10 Eligibility Criteria and Prioritization Factors have been developed for both the Development
11 STIP (D-STIP) and the Construction STIP (C-STIP). ACTs, MPOs and others (including
12 participants where an ACT does not exist) shall apply both regional and statewide perspectives
13 in making their recommendations. The Commission anticipates that most projects considered by
14 ACTs, MPOs and regional or statewide advisory groups would be the outcomes of planning and
15 the transportation management systems maintained by ODOT. ODOT Region staff shall assist
16 the ACT in developing recommendations as described in the *Policy on Formation and Operation*
17 *of the ACTS*, Section II. D, Role of ODOT Staff.

18
19 ACTs, MPOs and regional or statewide advisory groups should use this document as a guide
20 when they evaluate projects for the STIP on the state highway system and for off-system
21 projects that support implementation of the Oregon Highway Plan (OHP), in accordance with
22 Policy 2B: off-system improvements. Projects recommended for funding in the STIP should
23 have consistent application of the project eligibility criteria and prioritizing factors. ACTs, MPOs
24 and regional or statewide advisory groups may use additional criteria to select and rank projects
25 provided the criteria are consistent with the project eligibility criteria and prioritization factors
26 adopted by the OTC. If requested, ODOT staff will provide a model to assist with project
27 ranking. This process recognizes regional differences and is consistent with the *Policy on*
28 *Formation and Operation of the Area Commissions on Transportation*, Section VI, Basis for
29 Decision-making.

30
31 **In MPO areas designated as Transportation Management Areas (TMA)**, all projects using
32 federal regulations title 23 (23 CFR) or Federal Transit Act funds, shall be prioritized for
33 programming in the Transportation Improvement Program (TIP) from an approved Regional
34 Transportation Plan by the MPO in consultation with the State and transit operators. The State,
35 MPO and transit operators jointly program the prioritized projects. Should funding conflicts arise
36 within a program year, projects on the NHS and projects funded under the Bridge and Interstate
37 Maintenance programs shall be selected by the State, in cooperation with the MPO, from the
38 approved metropolitan TIP. Other projects utilizing federal funds shall be selected by the MPO
39 in cooperation with the State and transit operators.

40
41 **In MPO areas not designated as TMAs**, projects using federal title 23 or Federal Transit Act
42 funds, other than Federal Lands Highways program funds, shall be selected by the State and/or
43 the transit operator, in cooperation with the MPO, from the approved metropolitan Regional
44 Transportation Plan.

45
46 **Outside MPO areas**, transportation projects undertaken on the NHS and projects funded under
47 the Bridge and Interstate Maintenance programs will be selected by the State in consultation
48 with the affected local officials. Other transportation projects undertaken with funds
49 administered by FHWA, other than federal lands highway projects, shall be selected by the
50 State in cooperation with the affected local officials and projects undertaken with Federal Transit

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1 Act funds shall be selected by the State in cooperation with the appropriate affected local
2 officials and transit operators.

3
4 ACTs and MPOs should consult with each other during their STIP and MTIP development
5 processes to achieve a coordination of projects wherever possible. Where ACT and MPO
6 boundaries overlap, a higher level of clearly defined coordination is needed. Where this occurs,
7 the MPO and ACT should jointly agree on a process for maintaining consistency between ACT
8 recommendations and the MPO Plan and MTIP (*Policy on Formation and Operation of the Area*
9 *Commissions on Transportation, Section VII. G, Coordination*).

10 11 Project Eligibility Criteria

12
13 ACTs, MPOs, or regional or statewide advisory groups advising the OTC on the selection of
14 STIP projects for funding on the state highway system or for off-system projects that support
15 implementation of the OHP shall apply the project eligibility criteria. The project eligibility criteria
16 are a first screen so that additional efforts can be focused to determine which projects they will
17 evaluate further for funding. The eligibility criteria are not listed in any particular order. Projects
18 must satisfy these criteria, at a minimum, before they are given further consideration.

19 20 Prioritization Factors

21
22 The prioritization factors are to be used to ensure consistent consideration of the relative merits
23 of projects by ACTs, MPOs and regional or statewide advisory groups. With the exception of
24 project readiness which shall have greater weight, the prioritization factors are not listed in any
25 particular order and do not have any implied weight. To provide for regional differences, ACTs,
26 MPOs and regional or statewide advisory groups may use additional factors to rank projects
27 provided the factors are consistent with the factors adopted by the OTC. If an ACT, MPO or
28 regional or statewide advisory group chooses to use additional prioritization factors, they must
29 inform those developing project proposals about the factors prior to the beginning of the project
30 submittal period. When developing a tool to evaluate OHP policies, OHP Appendix A2 provides
31 definitional information to facilitate shared understanding of the goals, policies and actions of the
32 OHP policy element.

33 34 **D. Project Documentation**

35
36 ACTs, MPOs and regional or statewide advisory groups making recommendations to the OTC
37 shall document the analysis used to develop recommendations. The supporting information
38 should include the following:

- 39
40 1. Project description
41 2. Project justification
- 42 ♦ Identify the planning history
 - 43 ♦ As applicable, describe information provided from the pavements or bridge
 - 44 management system. If the recommendation varies from the prioritization
 - 45 identified by the management system, describe the process used to reach that
 - 46 recommendation.
 - 47 ♦ Describe how this project supports OHP policies (Table 1).
 - 48 ♦ Provide an assessment of the likelihood of the project getting to construction in
 - 49 the timeframe contemplated
 - 50 ♦ Provide supplementary project information if the project leverages additional
 - 51 funding or community benefit

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3. Applicable additional information

E. Funding

As required by federal regulations (23 CFR Part 450) the C-STIP is financially constrained by federal fiscal year (October-September). The Eligibility Criteria and Prioritization Factors defined in this document apply to projects that implement current revenue sources. If more funding becomes available, it will be allocated in adherence to any additional funding or selection criteria attached to those new funds.

The STIP represents multiple funding categories and each category has limits as to how the funding can be obligated. STIP projects must meet the funding source limitations established by state or federal regulations and cannot be selected without looking at those limitations. The D-STIP will be funded with the same funding sources as the C-STIP and the total funds committed to the D-STIP may vary. Funding of the D-STIP may be impacted by several factors, including the following: OTC selection of projects of statewide importance, federal earmarks and discretionary projects, federal and state restrictions on the use of available funds, and the Regional equity distribution of Modernization funds (ORS 366.507).

Federal discretionary projects

Federal discretionary projects are a part of federal appropriations or transportation funding legislation. The Oregon Department of Transportation, with direction from the Oregon Transportation Commission, developed guidelines to use in deciding which projects should be submitted as earmark proposals in federal legislation for the reauthorization of transportation funding. The projects are categorized as low or medium risk and can be completed over the life of the federal transportation funding bill. ODOT follows these guidelines for earmark projects and submits them to the Oregon Congressional Delegation for consideration during the federal budget process. Local jurisdictions and proponents that pursue earmark funding for projects not submitted by ODOT or supported by the Oregon Transportation Commission (OTC) are solely responsible for the required matching funds or any shortfalls.

The OTC recognizes that there may be unique circumstances in which proponents have been successful in obtaining federal discretionary projects that need to be placed in the STIP. These can be brought to the OTC as possible amendments to the STIP provided they meet the eligibility criteria and the match requirements as noted above.

II. Development STIP (D-STIP)

A. Introduction to the D-STIP

The Oregon Transportation Commission will make the final selections for all D-STIP projects and will apply a statewide perspective to the proposed list of projects, giving highest priority to OTC approved federal discretionary projects that have funding secured through federal legislation.

It will be important to clearly articulate the rationale and need of a D-STIP project in order to help manage expectations and potential next steps. D-STIP projects will be consistent with statewide policies and may be identified by the state management systems or in one or more planning documents. Planning documents may include system-level plans such as

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1 transportation system plans, regional transportation plans, or comprehensive plans, or facility-
2 level plans such as corridor plans, refinement plans, or interchange area management plans.
3 Appendix B illustrates the process that leads to approval of the Final STIP and where plans fit in
4 the process. Additionally, the OTC may choose to fund development work on projects of
5 statewide significance in the D-STIP. The D-STIP includes projects approved and funded for
6 development through specific milestones for planning, environmental or project development
7 activities and within specific timeframes.

8
9 Projects often begin in the D-STIP when they are complex projects that will take more than four
10 years to go to construction or when the appropriate transportation solution is not yet identified.
11 Project choices should address points obstructed by congestion, support regional and local land
12 use plans, and assist in job development or retention.

13
14 The following should be considered when applying the Eligibility Criteria and Prioritization
15 Factors:

- 16
17 ♦ A new alignment will be selected for one or several features in the refinement plan.
18 Project specific refinement plans may be funded in the D-STIP as needed to resolve
19 need, function, mode and general location decisions that could not be made during
20 system plan or corridor plan development. In circumstances where these decisions
21 have already been made, the goal of refinement planning will be to develop a
22 specific solution or a range of solutions to the problems(s) that support the next
23 appropriate project development step.
- 24 ♦ Rapid development is occurring in the area, making corridor preservation critical.
- 25 ♦ Issues needing resolution have a high priority and solutions are likely to be funded in
26 the near future.
- 27 ♦ The highway segment is very sensitive environmentally, and a strategy for the whole
28 segment needs to be approved before work on individual elements can commence.
29 For example, addressing land use to help resolve inconsistencies with planned
30 transportation facilities; planning for compatible land uses along state highways.
- 31 ♦ Public pressure for a sustainable decision is high.

32
33 Selection of D-STIP projects requires application of the D-STIP definition approved by the OTC.
34 D-STIP projects generally fall into the following three categories: federal discretionary projects
35 (earmarks), statewide significant projects, and modernization or major bridge replacement
36 projects.

37 38 Statewide significant projects

39
40 Statewide significant projects are projects that require funding that cannot be achieved within
41 standard STIP allocations but are viewed by the OTC as projects of statewide significance and
42 can be selected by the OTC independent of the ACT process. Identified funds would be used to
43 either keep existing work on very large projects current, or to support development of very large
44 projects (for example, funding a new Environmental Impact Statement or updating an existing
45 EIS).

46 47 Modernization or major bridge replacement projects

48
49 Modernization or major bridge replacement projects are projects that have been approved and
50 funded for development through specific milestones but that cannot be constructed within the
51 four-year timeframe of the STIP and/or within the normal Region STIP allocations. These may

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1 include shelf projects, which are high priority projects developed in anticipation of funding but
2 that have no funding identified for construction in the current STIP. Milestones include planning,
3 environmental and project development.

4 5 D-STIP Project Completion

6
7 ODOT and the Department of Land Conservation and Development (DLCD) shall work with
8 affected cities and counties to obtain land use approvals needed to select a specific alignment.
9 The level of land use consistency required will depend on the environmental milestone being
10 completed.

11
12 Projects should remain in the D-STIP until work required to meet the National Environmental
13 Policy Act (NEPA) is completed. NEPA classifications:

- 14
15 ♦ Class 1: Requires draft and final environmental impact statement (EIS). An EIS is
16 required for actions that significantly affect the environment.
- 17
18 ♦ Class 2: Categorical exclusion (neither an environmental assessment nor an
19 environmental impact statement is required). These actions do not individually or
20 cumulative have a significant environmental effect and are excluded from the
21 requirement to prepare an environmental assessment or environmental impact
22 statement.
- 23
24 ♦ Class 3: Requires environmental assessment (EA) or revised environmental
25 assessment. The environmental impact is not clearly established. All actions that
26 are not Class 1 or 2 fall into this classification. These actions require preparation of
27 an EA to determine the appropriate environmental document. If it is determined that
28 the action is likely to have a significant impact on the environment, the preparation of
29 an EIS will be required.

30 All Class 1 and 3 projects should be in the D-STIP until a final Record of Decision (ROD) or
31 Finding of No Significant Impact (FONSI) has been completed. By programming completion of
32 D-STIP milestones that follow a ROD or FONSI, the project delivery activity can continue
33 through right of way acquisition, advance plans, and/or plans specifications and estimates
34 (PS&E). The project could then be ready for inclusion in the C-STIP at the regular 2-year
35 update. Work on right of way, advance plans or PS&E may be conducted in either the D-STIP
36 or the C-STIP.

37 Although the primary purpose of the D-STIP is to develop projects for the C-STIP, inclusion in
38 the D-STIP does not guarantee funding for future D-STIP milestones or that a project will
39 automatically move into the C-STIP. Funding may not be available to construct the final solution
40 or the environmental document may identify the solution as a “No Build”.

41 42 **B. Development STIP**

43 44 **B. 1. Development STIP Eligibility Criteria Footnotes**

45 46 ¹**D-STIP milestones**

47 D-STIP projects must have funding to complete the identified milestone; partial milestones or
48 those with no funding will not be programmed. D-STIP milestones, while not necessarily
49 sequential, include those listed below. Not all projects are required to complete all the
50 milestones.

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- 1
- 2 ♦ Project specific refinement plan completion
- 3 ♦ Project specific refinement plan adoption
- 4 ♦ Land use consistency/Statewide Goal Compliance. (Project is included in the
- 5 acknowledged comprehensive plan or transportation system plan as a planned
- 6 facility, which is a facility allowed by the plan and that is expected to be constructed
- 7 within the next 20 years with available financial resources. This may include land use
- 8 decisions that establish need, mode, function and general location.)
- 9 ♦ Interchange Area Management Plan or Access Management Plan
- 10 ♦ Location Environmental Impact Statement (EIS) Record of Decision (ROD)
- 11 ♦ Design EIS ROD
- 12 ♦ Environmental Assessment (EA) and Finding of No Significant Impact (FONSI)
- 13 ♦ Right of way acquisition
- 14 ♦ Advance plans (or any other applicable project development design milestone)
- 15 ♦ Plans, specifications and estimates (PS&E)
- 16

17 B.2. Development STIP Prioritization Factors Footnotes

18 ²D-STIP Projects that Best Support the Oregon Highway Plan Policies

19 The Oregon Highway Plan is available at: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml>
20 and a summary list of OHP goals and policies is provided in Table 1. All projects should be
21 consistent with the OHP and this prioritization factor is to help choose among these projects.
22 Not all projects will advance all OHP policies but a project that is strongly supportive of several
23 OHP policies may be chosen over one that offers less support or supports fewer OHP policies.
24

25 ³Funding for D-STIP Projects

26 A funding scenario should be identified through construction, though not necessarily
27 guaranteed. Congressional high priority projects would fall into this category.
28

29 ⁴Leverage and Public Benefit for D-STIP Projects

30 ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects
31 leverage additional funding or collateral community benefits and make wise and efficient use of
32 infrastructure and natural resources. Those making project recommendations should pursue an
33 agenda to accomplish leverage or community benefits although specific benefits might not
34 always be known at the D-STIP stage. Examples of leverage and public benefits for D-STIP
35 modernization projects could include where applicable, but are not limited to the following:
36

- 37
- 38 ♦ Other funding contributions, such as additional federal funds, local matching funds or
- 39 provision of project right of way, private funding.
- 40 ♦ Bundling with other infrastructure projects (provided there is no adverse affect on
- 41 project readiness).
- 42 ♦ Environmental enhancement, such as culvert replacement and improved drainage or
- 43 fish passage.
- 44 ♦ Transfer of jurisdiction to promote jurisdictional responsibility and coordination.
- 45 ♦ Leveraging additional funds that contribute to transportation system effectiveness,
- 46 system operations, and revitalization of the downtown or main street, etc.
- 47 ♦ Direct benefits to multiple modes of travel, advancement of modal choice and
- 48 intermodal activities. This would include local efforts to accommodate non-auto
- 49 modal opportunities.
- 50 ♦ Local circulation improvements that support and complement the state highway
- 51 project.

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- 1 ♦ Improvements in Oregon's economy by addressing transportation challenges such
- 2 as key bottlenecks or improving transportation service delivery.
- 3 ♦ Potential for collecting toll revenues.
- 4 ♦ Projects that implement other innovative finance techniques.
- 5 ♦ Would facilitate public and private investment that creates or sustains jobs.
- 6
- 7 This determination must be considered within the capacity of the community on a case by case
- 8 basis.

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1 III. Construction STIP (C-STIP)

2 3 A. Introduction to the C-STIP

4 The C-STIP contains projects scheduled for construction and is financially constrained by
5 federal fiscal year. Application of the C-STIP Eligibility Criteria and Prioritization Factors
6 includes Modernization, Preservation and Bridge projects. Information about other programs in
7 the STIP may be found in the *Draft 2006-2009 STIP*.

8 9 **B. Modernization**

10
11 As stated in the *Oregon Highway Plan*, “The primary goal of modernization projects is to add
12 capacity to the highway system in order to facilitate existing traffic and/or accommodate
13 projected traffic growth. Modernization means capacity-adding projects including HOV lanes
14 and off-system improvements. Projects in this category include major widening of lanes or
15 bridges, and the addition of lanes, rest areas or entire facilities.” Where a culvert is replaced
16 with a bridge due to environmental analysis concluding that this is necessary, the project is not
17 considered modernization.

18 19 **B.1. Construction STIP Eligibility Criteria for Modernization Footnotes**

20 21 ⁵**Consistency with Comprehensive Plans and Transportation System Plans (TSP)**

22 The proposal must show that the project is consistent with the applicable adopted
23 comprehensive plan or transportation system plan as a planned facility, including land use
24 decisions that establish need, mode, function and general location, including goal exceptions,
25 where required. If consistency cannot be demonstrated the project submission will describe
26 how the inconsistency will be addressed, including changes to the project, TSP and/or
27 comprehensive plan and when they need to be completed. In such cases, the ACT or regional
28 or statewide advisory group may recommend that the project be included in the D-STIP, and
29 request that Transportation Planning Rule issues be addressed.

30
31 Proposed projects from within MPOs shall be identified in fiscally constrained Regional
32 Transportation Plans and shall meet air quality conformity requirements.

33 34 ⁶**Consistency with Oregon Highway Plan (OHP) Policy 1G, Action 1G.1, on Major 35 Improvements**

36 In order to demonstrate that a project is consistent with OHP Policy 1G, Action 1G.1, the
37 proposal must show that the project and/or the TSP clearly addressed the prioritization criteria
38 found in Action 1G.1 of the OHP.

39
40 Where needed to achieve consistency with the above-noted Oregon Highway Plan policy, the
41 ACTs, MPOs, or regional or statewide advisory groups, with ODOT assistance, shall negotiate
42 conditions for project approval with an applicant. These conditions, if not addressed as the
43 project proceeded through the D-STIP if applicable, shall be attached to the application
44 approved by the ACT, MPO or regional or statewide advisory group, shall be as specific as
45 possible given the stage of development of the project, and may include the following:

- 46
- 47 ♦ Interchange Area Management Plan or Access Management Plan,
- 48 ♦ Highway segment designations,
- 49 ♦ Needed local street improvements,
- 50 ♦ Traffic management plans,

Attachment B

- ◆ Land use plan designations,
- ◆ Other similar conditions.

B.2. Construction STIP Prioritization Factors for Modernization Footnotes

⁷Project Readiness for C-STIP Modernization Projects

Projects that can begin construction within the timeframe of the STIP and within the timeframe expected are considered to be more ready than those that have many or complicated remaining steps. The overall judgment of a project's readiness is dependent on timeliness of construction expectations not on the number of steps to be completed.

Where applicable, the hurdles to accomplish each of the following steps must be assessed for major modernization projects that have come through the D-STIP and for which a final Record of Decision (ROD) for a design level environmental impact statement or a Finding of No Significant Impact (FONSI) has been made:

- ◆ Public involvement
- ◆ Right of way purchased
- ◆ Final construction and traffic flow management plans developed
- ◆ Additional land use requirements such as completing plans for access management, supporting local transportation system improvements and land use measures to protect the function and operation of the project.

Projects that have not gone through the D-STIP or have not completed a FONSI or ROD must also assess the following:

- ◆ Environmental requirements
- ◆ Land use requirements
- ◆ Applicability of minor improvements and alternative mode solutions

If these components are not completed at the time of the assessment of project readiness, a plan to complete them must be described to help determine whether they can be addressed and construction begun within the projected timeframe. The project budget and timeline must include execution of the plan.

⁸Modernization Projects that Best Support the Oregon Highway Plan Policies

The Oregon Highway Plan is available at: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml> and a summary list of OHP goals and policies is provided in Table 1. All projects should be consistent with the OHP and this prioritization factor is to help choose among these projects. Not all projects will advance all OHP policies but a project that is strongly supportive of several OHP policies may be chosen over one that offers less support or supports fewer OHP policies.

⁹Projects that support freight mobility

Projects that support freight mobility are modernization projects on freight routes of statewide or regional significance, including:

- ◆ Highways on the State Highway Freight System as designated in the *Oregon Highway Plan*;
- ◆ Highways or local roads designated as National Highway System intermodal connectors;

Attachment B

- 1 ♦ Other highways with a high volume or percentage of trucks or which are important for
- 2 regional or interstate freight movement;
- 3 ♦ Local freight routes designated in a regional or local transportation plan.
- 4

5 These projects would remove identified barriers to the safe, reliable, and efficient movement of
6 goods and/or would support multimodal freight transportation movements.

7 8 ¹⁰**Leverage and Public Benefit for C-STIP Modernization Projects**

9 ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects
10 leverage additional funding or collateral community benefits and make wise and efficient use of
11 infrastructure and natural resources. Examples of leverage and public benefits for C-STIP
12 modernization projects include:

- 13
- 14 ♦ Other funding contributions, such as additional federal funds, local matching funds or
- 15 provision of project right-of-way, private funding.
- 16 ♦ Bundling with other infrastructure projects (provided there is no adverse affect on
- 17 project readiness).
- 18 ♦ Environmental enhancement, such as culvert replacement and improved drainage or
- 19 fish passage.
- 20 ♦ Transfer of jurisdiction to promote jurisdictional responsibility and coordination.
- 21 ♦ Leveraging of additional funds that contribute to transportation system effectiveness,
- 22 system operations, and revitalization of the downtown or main street, etc.
- 23 ♦ Direct benefits to multiple modes of travel, advancement of modal choice and
- 24 intermodal activities. This would include local efforts to accommodate non-auto
- 25 modal opportunities.
- 26 ♦ Local circulation improvements that support and complement the state highway
- 27 project.
- 28 ♦ Improvements in Oregon's economy by addressing transportation challenges such
- 29 as key bottlenecks or improving transportation service delivery.
- 30 ♦ Potential for collecting toll revenues.
- 31 ♦ Projects that implement other innovative finance techniques.
- 32 ♦ Would facilitate public and private investment that creates or sustains jobs
- 33

34 This determination must be considered within the capacity of the community on a case by case
35 basis.

36 37 ¹¹**Environmental Classification**

- 38 ♦ Class 1: Requires draft and final environmental impact statement (EIS)
- 39 ♦ Class 2: Categorical exclusion (neither an environmental assessment nor an
- 40 environmental impact statement is required)
- 41 ♦ Class 3: Requires environmental assessment (EA) or revised environmental
- 42 assessment
- 43

44 This prioritization factor is not intended to give Class 1 and 3 projects priority over or to exclude
45 Class 2 projects, but to give Class 1 and 3 projects with a completed ROD or FONSI priority
46 over Class 1 and 3 projects that require additional environmental documentation.

47 48 **C. Preservation**

49
50 The pavement preservation projects list is developed by ODOT's Pavement Management
51 System (PMS) and applied by the pavement management selection committees. The PMS is an

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1 electronic data management tool used by the department to identify, prioritize and develop
2 needed pavement preservation projects. The role of ACTs, MPOs and regional or statewide
3 advisory groups is to review the timing of the pavement preservation projects as they relate to
4 other local projects or issues; their comments will be considered as part of the process. It is
5 anticipated that these groups will primarily enhance selected projects by leveraging additional
6 funding or collateral community benefit. The interstate preservation projects are selected based
7 on the PMS and a statewide strategy and are therefore not a part of these criteria.
8

9 **C.1. Construction STIP Eligibility Criteria for Pavement Preservation Footnotes**

10 ¹²**Pavement Strategy**

11 The department has adopted a pavement preservation program designed to keep highways in
12 the best condition at the lowest lifecycle cost, taking into account available funding. ODOT
13 established a Pavement Strategy Committee in 1999 to address pavement preservation issues,
14 including the development of a statewide pavement strategy for all state highways. The
15 pavement strategy was developed using the department's Pavement Management System.
16 The strategy assumes maintenance of existing traffic capacity; it does not provide for capacity
17 improvements.
18

19
20 Using the list generated by the Pavement Management System (PMS), each Region is
21 responsible for recommending preservation projects for inclusion in the STIP.
22

23 **C.2. Construction STIP Prioritization Factors for Pavement Preservation** 24 **Footnotes**

25 ¹³**Project Readiness for C-STIP Preservation Projects**

26 Projects that can begin construction within the timeframe of the STIP and within the timeframe
27 expected are considered to be more ready than those that have many or complicated remaining
28 steps. The overall judgment of a project's readiness is dependent on timeliness of construction
29 expectations not on the number of steps to be completed.
30

31 ¹⁴**Preservation Projects that Best Support the Oregon Highway Plan Policies**

32 The Oregon Highway Plan is available at: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml>
33 and a summary list of OHP goals and policies is provided in Table 1. All projects should be
34 consistent with the OHP and this prioritization factor is to help choose among these projects.
35 Not all projects will advance all OHP policies but a project that is strongly supportive of several
36 OHP policies may be chosen over one that offers less support or supports fewer OHP policies.
37
38

39 ¹⁵**Leverage and Public Benefit for C-STIP Preservation Projects**

40 ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects
41 leverage additional funding or collateral community benefits and make wise and efficient use of
42 infrastructure and natural resources. Examples of leverage and public benefits for C-STIP
43 pavement preservation projects include:
44

- 45 ♦ Other funding contributions, such as additional federal funds, local matching funds or
46 provision of project right-of-way, private funding.
- 47 ♦ Bundling with other infrastructure projects (provided there is no adverse affect on
48 project readiness).
- 49 ♦ Environmental enhancement, such as culvert replacement and improved drainage or
50 fish passage.

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- 1 ♦ Transfer of jurisdiction to promote jurisdictional responsibility and coordination.
- 2 ♦ Leveraging of additional funds that contribute to transportation system effectiveness,
- 3 system operations, and revitalization of the downtown or main street, etc.
- 4 ♦ Direct benefits to multiple modes of travel, advancement of modal choice and
- 5 intermodal activities. This would include local efforts to accommodate non-auto
- 6 modal opportunities.
- 7 ♦ Local circulation improvements that support and complement the state highway
- 8 project.
- 9 ♦ Improvements in Oregon's economy by addressing transportation challenges such
- 10 as improving transportation service delivery.

D. Bridge

14 The process of identifying bridge projects for the STIP relies on the Bridge Management
15 System. ODOT maintains a complete inventory of all state (and local) bridges longer than 20
16 feet. The aggregation of structure inventory, condition data collected on a routine basis, and
17 appraisal data assigned according to national guidelines fulfill the requirements of the National
18 Bridge Inventory (NBI). Data required by the National Bridge Inspection Standards (NBIS) and
19 additional data collected by ODOT bridge inspectors provide the condition and inventory data
20 necessary for the analysis of ODOT bridges. Applying criteria in twelve separate deficiency
21 categories, and considering OTC and program goals and requirements, projects are selected on
22 a statewide basis. After technical review and coordination with the Regions and the statewide
23 Bridge Leadership Team, the State Bridge Engineer recommends a list of projects for inclusion
24 in the STIP. The role of ACTs, MPOs and regional or statewide advisory groups is to review the
25 timing of the bridge replacement/rehabilitation projects as they relate to other local projects or
26 issues; their comments will be considered as part of the process. It is anticipated that these
27 groups will primarily enhance selected projects by leveraging additional funding or collateral
28 community benefits.

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D.1. Construction STIP Eligibility Criteria for Bridge Footnotes

¹⁶Bridge Management System

State Bridge Project Selection

This criterion applies to bridges on the State highway system only. Through an agreement between the State and the Association of Oregon Counties (AOC) and the League of Oregon Cities (LOC), the federal Highway Bridge Program project funds are divided between the State and local agencies based on the percentages of deficient bridges. Local bridge projects are covered through a separate selection process.

State bridge projects proposed for funding will be selected based on the desire to maintain and improve transportation's role in Oregon's economy. Traditionally, modernization funding will pay for major improvements to the transportation system including the bridge work. The State Bridge Program will support OTIA, freight mobility, life safety and protection of the transportation infrastructure investment.

Focusing on the Interstate Highway and Oregon Highway Plan Freight Routes, consider bridges as candidates based on the following:

- ◆ Bridges in need of improvements that eliminate load, width or vertical restrictions or poor structural condition.
- ◆ Bridges that preserve freight corridors, detour and other lifeline routes.
- ◆ Other structural, safety and functional considerations.

D.2. Construction STIP Prioritization Factors for Bridge Footnotes

¹⁷Bridge Options Report

Priority will be given to projects that support the Bridge Options Report adopted by the Oregon Transportation Commission. The Bridge Options Report helped to organize the needed bridge repairs that were funded under the Oregon Transportation Investment Act III. As of December 2006, a majority of these projects are under construction or in final design in preparation for construction. By the time of the OTC's adoption of the Final 2010-2013 STIP, this program will be largely complete.

¹⁸Bridge Projects that Best Support the Oregon Highway Plan Policies

The Oregon Highway Plan is available at: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml> and a summary list of OHP goals and policies is provided in Table 1. All projects should be consistent with the OHP and this prioritization factor is to help choose among these projects. Not all projects will advance all OHP policies but a project that is strongly supportive of several OHP policies may be chosen over one that offers less support or supports fewer OHP policies.

¹⁹Projects that Support Freight Mobility

Projects that support freight mobility are bridge replacement and rehabilitation projects on freight routes of statewide or regional significance, including:

- Highways on the State Highway Freight System as designated in the *Oregon Highway Plan*;

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- 1 • Highways or local roads designated as National Highway System intermodal connectors;
- 2 • Other highways with a high volume or percentage of trucks or which are important for
- 3 regional or interstate freight movement;
- 4 • Local freight routes designated in a regional or local transportation plan.

5
6 These projects would remove identified barriers to the safe, reliable, and efficient movement of
7 goods and/or would support multimodal freight transportation movements.

9 ²⁰**Project Readiness for C-STIP Bridge Projects**

10 Projects that can begin construction within the timeframe of the STIP are considered to be more
11 ready. The overall judgment of a project's readiness is dependent on timely completion of
12 necessary pre-construction steps and not on the number of steps to be completed.

14 ²¹**Leverage and Public Benefit for C-STIP Bridge Projects**

15 ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects
16 leverage additional funding or collateral community benefits and make wise and efficient use of
17 infrastructure and natural resources. Examples of leverage and public benefits for C-STIP
18 bridge replacement/rehabilitation projects include:

- 19
- 20 ♦ Other funding contributions, such as additional federal funds, local matching funds or
- 21 provision of project right-of-way, private funding.
- 22 ♦ Bundling with other infrastructure projects (provided there is no adverse affect on
- 23 project readiness).
- 24 ♦ Environmental enhancement, such as culvert replacement and improved drainage or
- 25 fish passage.
- 26 ♦ Direct benefits to multiple modes of travel, advancement of modal choice and
- 27 intermodal activities. This would include local efforts to accommodate non-auto
- 28 modal opportunities.
- 29 ♦ Improvements in Oregon's economy by addressing transportation challenges
- 30 including improving service delivery.

Oregon Highway Plan Policies

Table 1

GOAL 1: SYSTEM DEFINITION
POLICY 1A: STATE HIGHWAY CLASSIFICATION SYSTEM
POLICY 1B: LAND USE AND TRANSPORTATION
POLICY 1C: STATE HIGHWAY FREIGHT SYSTEM
POLICY 1D: SCENIC BYWAYS
POLICY 1E: LIFELINE ROUTES
POLICY 1F: HIGHWAY MOBILITY STANDARDS
POLICY 1G: MAJOR IMPROVEMENTS
POLICY 1H: BYPASSES
GOAL 2: SYSTEM MANAGEMENT
POLICY 2A: PARTNERSHIPS
POLICY 2B: OFF-SYSTEM IMPROVEMENTS
POLICY 2C: INTERJURISDICTIONAL TRANSFERS
POLICY 2D: PUBLIC INVOLVEMENT
POLICY 2E: INTELLIGENT TRANSPORTATION SYSTEMS
POLICY 2F: TRAFFIC SAFETY
POLICY 2G: RAIL AND HIGHWAY COMPATIBILITY
GOAL 3: ACCESS MANAGEMENT
POLICY 3A: CLASSIFICATION AND SPACING STANDARDS
POLICY 3B: MEDIANS
POLICY 3C: INTERCHANGE ACCESS MANAGEMENT AREAS
POLICY 3D: DEVIATIONS
POLICY 3E: APPEALS
GOAL 4: TRAVEL ALTERNATIVES
POLICY 4A: EFFICIENCY OF FREIGHT MOVEMENT
POLICY 4B: ALTERNATIVE PASSENGER MODES
POLICY 4C: HIGH-OCCUPANCY VEHICLE (HOV) FACILITIES
POLICY 4D: TRANSPORTATION DEMAND MANAGEMENT
POLICY 4E: PARK-AND-RIDE FACILITIES
GOAL 5: ENVIRONMENTAL AND SCENIC RESOURCES
POLICY 5A: ENVIRONMENTAL RESOURCES
POLICY 5B: SCENIC BYWAYS

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Appendix A

Key Website Addresses

Draft and Final STIP, Project Summary Reports:

<http://www.oregon.gov/ODOT/HWY/STIP/index.shtml>

STIP Users' Guide: <http://www.oregon.gov/ODOT/TD/TP/stipGuide.shtml>

Management Systems: <http://intranet.odot.state.or.us/otms/>

Bridge Options Report:

http://www.oregon.gov/ODOT/COMM/docs/bridge_options/bridge_options.pdf

Policy on Formation and Operation of the ACTs:

http://www.oregon.gov/ODOT/COMM/act_main.shtml

Program Advisory Committees, Community Involvement:

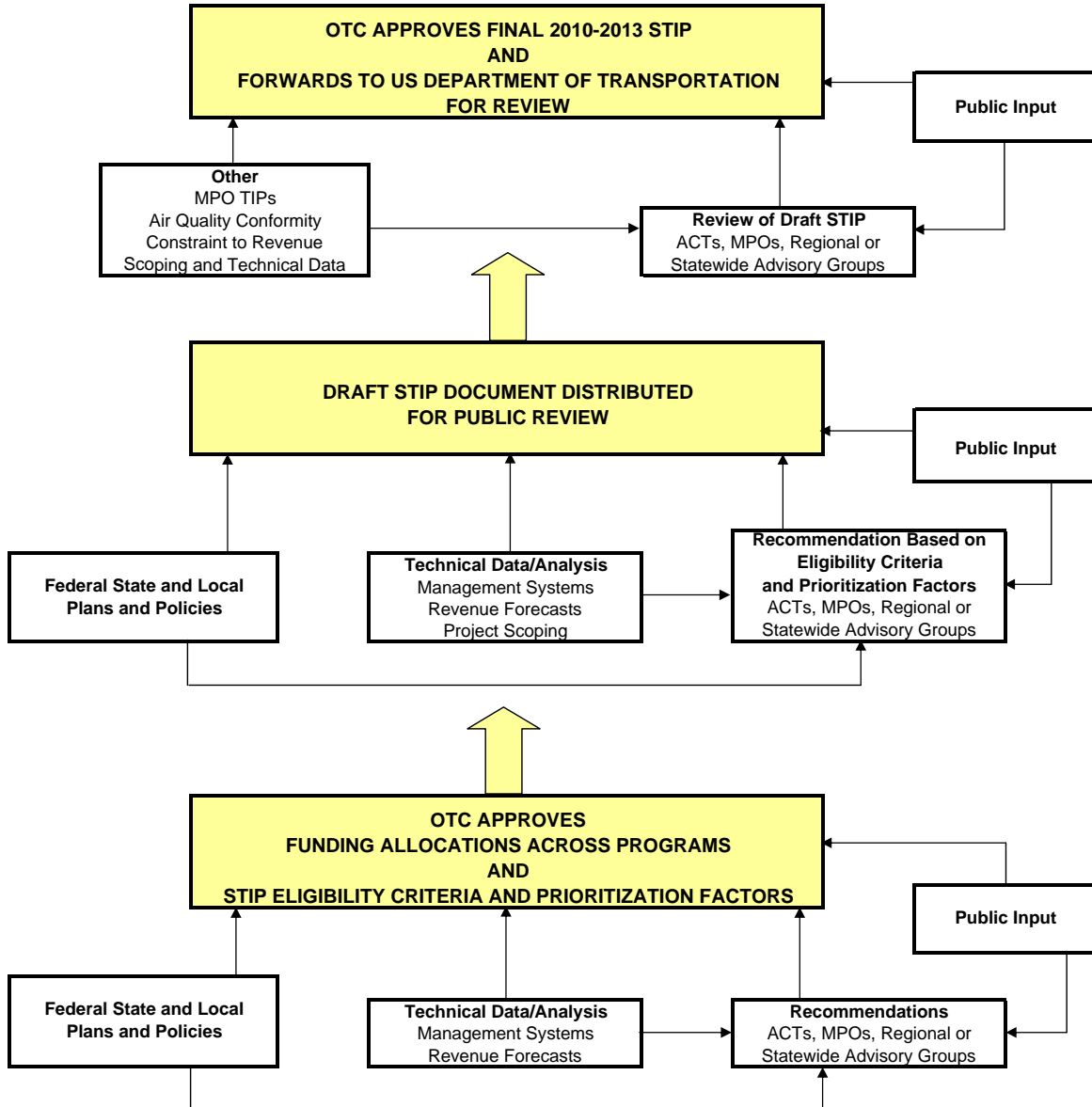
<http://www.oregon.gov/ODOT/involvement.shtml>

OHP Web site: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml>

OTP Web site: <http://www.oregon.gov/ODOT/TD/TP/ortransplanupdate.shtml>

Appendix B

STATEWIDE TRANSPORTATION IMPROVEMENT PROGRAM
DECISION PROCESS



KEY
 ACT: Area Commission on Transportation
 MPO: Metropolitan Planning Organization
 TIP: Transportation Improvement Program

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 08-3916, FOR THE PURPOSE OF ADOPTING THE POLICY DIRECTION AND PROGRAM OBJECTIVES FOR THE 2009 REGIONAL FLEXIBLE FUNDING ALLOCATION PROCESS AND 2010-13 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP)

Date: March 20, 2008

Prepared by: Ted Leybold

BACKGROUND

This resolution would approve a report outlining the policy direction, program objectives and procedures that will be used during the 2010-13 Regional Flexible Fund allocation process and MTIP update to nominate, evaluate and select projects to receive federal transportation funds in the fiscal year 2012-13 biennium.

The process for updating the policies for the 2010-2013 MTIP and Regional Flexible Fund allocation involved surveying JPACT and Metro Council members as well as surveying targeted stakeholder groups as to what changes should be made to the guiding policy for the respective programs. The survey results and feedback from MPAC, MTAC, and TPAC through several regular meetings and a special JPACT meeting have been used to create the Draft Policy Report, Exhibit A to Resolution 08-3916. This report is scheduled to receive a recommendation for approval by MPAC at their March 12, 2008 meeting. JPACT is scheduled to adopt the report at their March 13, 2008 meeting.

The Metro Council and the Chief Operating Officer are preparing a request to local jurisdictions to submit projects to Metro for evaluation and award of regional flexible transportation funding. Regional flexible transportation funds are those portion of federal funds accounted for in the MTIP that are allocated through the JPACT/Metro Council decision-making process.

Metro and ODOT update the MTIP/STIP every two years to schedule funding for the following four-year period. The 2010-13 Regional Flexible Fund allocation process encompasses the four-year period of federal fiscal years 2010 through 2013. This update will therefore adjust, as necessary, funds already allocated to projects in fiscal years 2010 and 2011 in the current approved MTIP. It will also allocate funds to new projects in the last two years (2012 and 2013) of the new MTIP.

The regional flexible funds available for the 2010-13 allocation are composed of two types of federal transportation assistance, which come with differing restrictions. The most flexible funds are surface transportation program (STP) funds that may be used for virtually any transportation purpose, identified in the Financially Constrained RTP, short of building local residential streets.

The second category of money is Congestion Mitigation/Air Quality (CMAQ) funds. CMAQ funds cannot be used to build new lanes for automobile travel. Also, projects that use CMAQ funds must demonstrate that some improvement of air quality will result from building or operating the project.

ANALYSIS/INFORMATION

1. **Known Opposition** None known at this time.

2. **Legal Antecedents** Updates the 2008-11 Transportation Priorities and MTIP policy report, adopted by Metro Council Resolution 06-3665 on March 23rd, 2006 (FOR THE PURPOSE OF ADOPTING THE POLICY DIRECTION, PROGRAM OBJECTIVES, PROCEDURES AND CRITERIA FOR THE TRANSPORTATION PRIORITIES 2008-11 ALLOCATION PROCESS AND METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP)).
3. **Anticipated Effects** Adoption of this resolution will provide the policy direction, program objectives and procedures that will be used during the 2010-13 Regional Flexible Fund Allocation Process and MTIP update to nominate, evaluate and select projects to receive federal transportation funds in the fiscal year 2012-13 biennium as described in Exhibit A of Resolution 08-3916.
4. **Budget Impacts** None.

RECOMMENDED ACTION

Metro staff recommends the approval of Resolution No. 08-3916.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE) RESOLUTION NO. 08-3919
REGIONAL TRAVEL OPTIONS 2008-2013)
STRATEGIC PLAN) Introduced by Chief Operating Officer
) Michael J. Jordan, with the concurrence of
) Council President David Bragdon

WHEREAS, Metro adopted the 2035 federal Regional Transportation Plan on December 13, 2007; and

WHEREAS, Goal 3: Expand Transportation Choices, Objective 3.1 calls for the region to achieve targets for increased walking, bicycling, use of transit and shared ride and reduced reliance on the automobile and drive alone trips; and

WHEREAS, Goal 4: Emphasize Effective and Efficient Management of the Transportation System, Objective 4.1 calls for the region to implement strategies that optimize the regional transportation system to enhance mobility, reliability and safety; and

WHEREAS, Goal 6: Promote Environmental Stewardship, Objective 6.2 calls for the region to reduce transportation-related vehicle emissions to improve air quality so that as growth occurs, the view of the Cascades and the Coast Range from within the region are maintained and greenhouse gas emissions are reduced; and

WHEREAS, the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee that provides oversight for the development and evaluation of travel options strategies has gone through a strategic planning process and has developed the Regional Travel Options 2008-2013 Strategic Plan to support implementation of Regional Transportation Plan goals and objectives; and

WHEREAS, the Regional Travel Options 2008-2013 Strategic Plan describes the goals, objectives, strategies and priorities the program will carry out; and

WHEREAS, the Regional Travel Options 2008-2013 Strategic Plan describes the roles of Metro and program partners in carrying out program activities and identifies a base budget to support those activities; now therefore

BE IT RESOLVED that the Metro Council hereby:

1. Approves the mission, goals, strategies and actions in the Regional Travel Options 2008-2013 Strategic Plan.
2. Approves the base budget and funding sub-allocations to program partners described in Appendix B of the Regional Travel Options 2008-2013 Strategic Plan, actual funding levels will be established through the Metropolitan Transportation Improvement Program decision-making process.

ADOPTED by the Metro Council this 20th day of March 2008.

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

Regional Travel Options 2008 – 2013 Strategic Plan

TPAC DRAFT, adopted 2/22/2008



METRO

PEOPLE PLACES
OPEN SPACES

Metro
People places • open spaces

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy

Your Metro representatives

Metro Council President – David Bragdon

Metro Councilors – Rod Park, District 1; Carlotta Collette, District 2; Carl Hosticka, District 3; Kathryn Harrington, District 4; Rex Burkholder, District 5; Robert Liberty, District 6.

Auditor – Suzanne Flynn

Metro's web site: www.metro-region.org



METRO

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Acknowledgements

Special thanks to the members of the Regional Travel Options Subcommittee of TPAC for their participation in, and support, for the strategic planning process.

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This document is printed on recycled paper.

Program Partners



Drive less. Save more.
www.DriveLessSaveMore.com



Gresham Regional Center
TMA

State of Oregon
Department of
Environmental
Quality

lloyd^{dot}tma
your go to place for get there options



Multnomah County



SMART
South Metro Area Regional Transit



TRI MET

Troutdale
Area TMA



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Executive summary

Introduction

The Regional Travel Options (RTO) Program carries out regional strategies to increase use of travel options, reduce pollution and improve mobility.

Regional travel options include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking and telecommuting.

The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours.

RTO strategies offer low-cost solutions that:

- Address employer and commuter transportation needs
- Save consumers money
- Reduce vehicle emissions that contribute to air pollution and global warming
- Encourage active travel modes that enhance public health and increase physical activity
- Increase public awareness of the personal and community benefits of travel options

Mission and policy framework

Mission: *The regional partners will work collaboratively to provide and actively market a range of travel options for all residents and employees of the region.*

Supports system management policies

Policies at the federal, state and regional level emphasize system management as a cost-effective solution to expanding the transportation system. The RTO program supports system management strategies that reduce demand on the transportation system. RTO strategies relieve congestion and support movement of freight by reducing drive-alone auto trips.

RTO strategies are expected to reduce approximately 86,600,000 vehicle miles of travel (VMT) per year from 2008 to 2013. By 2013, this represents over a 100% increase over 2006 VMT reductions produced by the program. The expected increase in VMT reductions is based upon past program performance, expected revenues, improving measurement and cost-effective investments.

On a daily basis, expected VMT reductions are the equivalent of removing 19,000 autos from the road or 59 miles of autos placed bumper-to-bumper.

Leverages capital investments

The RTO program supports and leverages capital investments in transit, trails, and other infrastructure by marketing new options to potential riders and users and increasing trips made by transit, walking, cycling and other travel options.

Supports development of local downtown centers

The RTO program supports the development of local downtown centers by increasing the share of trips made with travel options and decreasing drive-alone auto trips, which reduces traffic congestion and demand for parking and enhances quality of life. RTO is one component in the effort to have half or more of all trips to centers made by transit, walking, cycling, carpooling and other travel options.

Reduces air pollution and greenhouse gas emissions

Motor vehicles are one of the largest sources of air pollution in the Portland area. The RTO program supports federal, state and regional air quality regulations and reduces the consumption of gasoline and increases the share of trips made with less polluting modes of travel.

Expected Reductions in Gallons of Gasoline Consumed

Gas	Total	Average per year
Gallons of gasoline	21,100,000	4,220,000
Savings	\$63,300,000	\$12,660,000

Table 1. Total and average annual reduction of gas consumption and the resulting savings. Source: Estimates using DEQ average miles-per-gallon and gas priced at \$3/gallon

Expected Emission Reductions

Emissions reduced	Total	Average per year
Smog producing volatile organic compounds	616 tons	123 tons
Oxides of nitrogen and carbon monoxide	7,600 tons	1,500 tons
Greenhouse gas (CO ₂)	214,000 tons	42,600 tons
Carcinogenic particulate matter (PM ₁₀ and PM _{2.5})	18.3 tons	3.7 tons
Air toxics (Benzene and four others)	24.2 tons	4.8 tons

Table 2. Total and average annual reduction of tailpipe emissions: Source Metro estimates using DEQ emission factors

Program Priorities 2008 to 2013

- Support new capital investments in transit, trails and other infrastructure by marketing new options to potential riders and users.
- Reach additional employers and commuters through employer programs.
- Enhance traveler information services.
- Market travel options to new residents and people who relocate in the region.
- Support development of parking management strategies in local downtowns and centers.
- Support public-private partnerships to leverage investments and increase use of travel options in local downtowns and centers.
- Apply individualized marketing strategies in select locations to increase travel options use and decrease single-person car trips.
- Continue implementation of the Drive Less/Save More campaign to increase awareness and use of travel options.

Program Goals 2008 to 2013

Goal 1: Continue a regional collaborative marketing campaign to increase awareness and use of travel options and reduce drive-alone car trips.

Goal 2: Support employers and commuters to increase the use of travel options for commute trips.

Goal 3: Provide information and services to support increased use of travel options for all trips.

Goal 4: Promote and provide services that support increased use of travel options in local downtowns and centers.

Goal 5: Report progress to aid decision-making and encourage innovation.

Goal 6: Follow a collaborative decision-making structure that provides program oversight and advances the goals and objectives of the Regional Transportation Plan (RTP).

Table 3. Program Goals

Programs and services

Metro manages and administers the regional program, measures results, and provides assistance to partners. Public and private partners carry out local strategies through grant agreements. Collaboration among partners is emphasized to leverage resources, avoid duplication and maximize program impacts.

Drive Less/Save More marketing campaign

The campaign encourages people to think before they drive in order to reduce single-person car trips, adopt cost-saving driving habits, and use travel options for non-work trips. Campaign messages reach target audiences through advertising, publicity and community outreach.

Individualized marketing projects

Individualized marketing projects (also called TravelSmart™ or Smart Trips projects) encourage reductions in drive-alone auto trips. The concept, used in more than 300 projects around the world, identifies individuals who want to change the way they travel and uses personal, individualized contact to motivate them to think about their travel options.

Portland Transportation Options

Programs and activities are designed to remove barriers and provide incentives for people to choose travel options with an ultimate goal of reducing vehicle miles traveled by 10% per capita by 2020. Portland's programs include SmartTrips downtown and neighborhood programs, community outreach, and Safe Routes to Schools.

Metro Regional Rideshare Services

Metro works with employers to market rideshare services to employees and provides customized rideshare matching services and vanpool incentives. Incentives for commuter vanpools are provided in partnership with ODOT and C-TRAN.

Oregon Department of Environmental Quality (DEQ)

DEQ's Employee Commute Options (ECO) rules affect employers in the Portland area with more than 100 employees. Employers must survey employees and provide programs and incentives that reduce employee drive-alone trips by 10%. DEQ assists employers with the survey and program development and links them to RTO program resources.

SMART Options Employer and Community Outreach

The City of Wilsonville SMART Options Outreach Program works with Wilsonville area employers and residents to promote transit and other transportation options.

Southbound Solutions

The Vancouver, Washington Commute Trip Reduction Program conducts marketing and outreach to Clark County residents commuting to the Portland Metro area for work and assists Portland-area employers with a large Clark County employee base.

TriMet Employer Outreach Program

TriMet works with employers to encourage increased use of transit and other travel options among employees, offers transit pass programs, and provides one-on-one assistance to employers.

Transportation Management Association (TMA) Program

Transportation Management Associations (TMAs) are public-private partnerships to relieve traffic congestion and pollution. TMAs develop and implement area-specific strategies to reduce drive-alone commute trips.

- Clackamas Regional Center TMA
- Gresham Regional Center TMA
- Lloyd TMA
- Swan Island TMA
- Troutdale TMA
- WTA (Westside Transportation Alliance)

Traveler information tools and services

CarpoolMatchNW.org

CarpoolMatchNW is the carpool and rideshare-matching site serving Oregon and SW Washington with over 8,800 commuters registered. CarpoolMatchNW.org is an easy convenient way to find someone to share a ride for trips to work or school or one-time trips to recreation destinations and events.

Bike There! map

Metro's Bike There! map rates selected throughstreets where bicyclists share the road with motorists and is sold in area bike shops and retail outlets. Map information is available at ByCycle.org, an on-line bicycle route-finding tool.

Walk There! 50 Urban Treks in Neighborhoods, Natural Areas and Cities

The guidebook features 50 walking routes and will be published in partnership with Kaiser Permanente in April 2008 to encourage walking for transportation purposes. Guides will be distributed through Kaiser health education classes, walking events and local walking programs.

Section 1: Introduction

The RTO program implements regional policies to reduce drive-alone auto trips and personal vehicle miles of travel and to increase use of travel options. The program improves mobility and reduces pollution by carrying out the transit, ridesharing (carpool and vanpool), cycling, walking, telecommuting and carsharing strategies in the RTP. The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours.

RTO strategies offer low-cost solutions that address employer and commuter transportation needs. Employer benefits include reduced parking need and cost, reduced employee absenteeism and late arrivals and improved employee productivity and morale. Transit and rideshare programs enable employers to recruit employees from a wider geographic area.

The program increases public awareness of the personal and community benefits of travel options use. Consumers who reduce their drive-alone auto trips benefit by saving money on fuel, parking and auto maintenance. People who use active travel modes, such as cycling, walking and walking to transit, benefit from increased levels of physical activity. Community benefits include reductions in vehicle emissions that impact human health and contribute to air pollution and global warming.

Section 2: Mission and policy framework

Mission: *The regional partners will work collaboratively to provide and actively market a range of travel options for all residents and employees of the region.*

Supports system management policies

Policies at the federal, state and regional levels including the Federal Congestion Management Process, the Oregon Transportation Plan, and the RTP emphasize system management as a cost-effective alternative to expanding the transportation system. The RTO program supports system management strategies that reduce demand on the transportation. RTO strategies relieve congestion and support movement of freight by reducing drive-alone auto trips.

RTO strategies are expected to reduce approximately 86,600,000 vehicle miles of travel (VMT) per year from 2008 to 2013. By 2013 this represents over a 100% increase from 2006 VMT reductions produced by the program. The expected increase in VMT reductions is based upon past program performance, expected revenues, improving measurement and cost-effective investments, and is described in more detail in Appendix A.

On a daily basis, expected VMT reductions are the equivalent of removing 19,000 autos from the road or 59 miles of autos placed bumper-to-bumper.

In 2008 to 2013, the RTO program will work with the Regional Mobility Program to develop and recommend policies and investment strategies to implement the RTP system management concept. In addition, RTO will develop and identify system management partnership and collaboration opportunities, particularly around the development and enhancement of traveler information systems.

Supports capital investments

The RTO program supports and leverages capital investments in transit, trails, and other infrastructure by marketing new options to potential riders and users and increasing trips made by transit, walking, cycling and other travel options.

In 2008 to 2013, the RTO employer outreach programs will conduct outreach to employers adjacent to the WES (Westside Express Service) commuter rail line and the I-205 light rail line (MAX Green Line).

Supports development of local downtown centers

In the region's long-range plan, the 2040 Growth Concept, high-quality development in centers and along transit corridors is key to maintaining the livable communities and natural beauty that make our region special. The plan designates regional and town centers and calls for growth to be concentrated in these centers - as well as main streets, station communities and corridors - in order to use urban land most efficiently.

The RTO program supports the development of local downtown centers by increasing the share of trips made with travel options and decreasing drive-alone auto trips, which reduces traffic congestion and demand for parking and enhances the quality of life. RTO is one component in the effort to have half or more of all trips to centers made by transit, walking, cycling, carpooling and other travel options.

Reduces air pollution and green house gas emissions

Motor vehicles are one of the largest sources of air pollution in the Portland area. The RTO program supports federal, state and regional air quality regulations, reduces the consumption of gasoline and increases the share of trips made with less polluting modes of travel. RTO strategies are expected to reduce consumption of gasoline by 4,500,000 gallons each year, which will result in significant decreases in emissions of greenhouse gases, smog producing compounds, air toxics and particulate matter. See Appendix A for details.

Supports Metro Council goals and objectives

The RTO program supports the following Metro Council goals and objectives:

Goal 1. Healthy Environment - Council Objective 2.6: Residents' health is enhanced by exceptionally clean air and water.

Goal 2. Vital Economy - Council Objective 3.1: Land is available to meet the need for housing and employment; and Council Objective 3.3: Access to jobs, services, centers and industrial areas is efficient.

Goal 3. Great Places - Council Objective 1.2 - The region's centers and corridors are distinctive, attractive and efficient and while fully developed they are also continually and dynamically re-creating themselves.

Section 3: 2008 to 2013 program priorities

Employer outreach

- Promote travel options to employers and commuters. Target commuters with potential to use WES (Westside Express Service) commuter rail and I-205 light rail (MAX Green Line).
- Support the Southbound Solutions marketing campaign to reach Clark County commuters who travel to the Portland area.
- Enhance coordination of employer outreach strategies to maximize investments and avoid duplication.

Traveler information services

- Update CarpoolMatchNW.org to enhance the site's usability and reduce administrative costs.
- Explore development of a regional multi-modal trip-planning tool to aid travel decision making for all trip purposes.

Outreach to new residents and people who relocate

- Relocation is a key time for people to consider travel options and change travel habits. The RTO program will identify target market segments among new residents and develop strategies to market travel options and services to those audiences.

Parking management

- Parking management results in positive impacts across land use, managing the transportation system and supporting the economy. Parking is often considered "free" by the public and assumed to be the cost of doing business for companies. The RTO program will partner with employers, developers and local jurisdictions to help manage parking through employer outreach and RTO grants.

- Potential projects include: designate spaces for carpools and vanpools, install prominent bike parking, assist employers to discontinue parking subsidies for employees, help implement shared parking agreements between property owners that result in fewer auto trips and help implement parking pricing or short term parking zones that free up parking in business and retail centers while encouraging drivers with long-term parking needs to try carpooling, transit or other options.

Public-private partnerships

- Support public-private partnerships to leverage investments and increase use of travel options in local downtowns and centers.
- Update regional TMA policy and explore funding options.

Individualized marketing

- Apply individualized marketing strategies in select locations to increase travel options use and decrease single-person car trips.

Drive Less/Save More

- Continue implementation of the Drive Less/Save More campaign to increase awareness and use of travel options.

Section 4: Regional Travel Options programs and services

Program history

The program has been funded for more than 20 years, and has grown to include a variety of regional partners and stakeholders including area business associations and chambers of commerce, local transportation management associations, transportation and public health advocacy organizations, local governments and partner agencies.

In 2003, program partners saw a need to more actively market travel options through a unified regional marketing program and developed the *Regional Travel Options Program 5-Year Strategic Plan* to articulate the mission, goals and objectives of the re-named program. The Metro Council approved the strategic plan in 2004. The plan placed an emphasis on coordinating regional marketing activities and recommended that program management shift from TriMet to Metro.

The 2003 strategic plan defined regional travel options to include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking and telecommuting– and emphasized collaboration and integration to produce a program with measurable results and tangible impacts.

Metro assumed management of the program in 2006 and is responsible for management and coordination of regional initiatives, such as the Drive Less/Save More marketing campaign, administration of grant agreements with local jurisdictions and TMAs and evaluation and measurement of program results.

Program structure for 2008 to 2013

Metro manages and administers the program. Public and private partners carry out local strategies through grant agreements. Collaboration among partners is emphasized to leverage resources, avoid duplication and maximize program impacts.

Marketing programs

Collaborative marketing activities will be coordinated by Metro and include management of the Drive Less/Save More marketing campaign and administration of grant agreements with local jurisdictions and organizations to carry out the collaborative marketing goals and objectives.



Drive Less/Save More marketing campaign

The campaign encourages people to think before they drive in order to reduce single-person car trips, adopt cost-saving driving habits and use travel options for non-work trips. ODOT, Metro, Washington County, TriMet and other public and private partners launched the campaign in February 2006.

To date the campaign has reached 98% of the region's residents through television, radio and outdoor (billboard and transit) advertising, earned (free) media and community outreach. A June 2007 survey found that 27% of metro area residents recall seeing, reading or hearing about the Drive Less/Save More campaign. Of those who recalled the Drive Less/Save More campaign, 56% said they have taken action to reduce single person car trips as a result of seeing the campaign (this translates to 14% of the total survey sample).

Individualized marketing projects

Individualized marketing projects (also called TravelSmart™ or Smart Trips projects) are an innovative way to encourage reductions in drive-alone auto trips. The concept, used in more than 300 projects around the world, identifies individuals who want to change the way they travel. Personal, individualized contact is used to motivate people to think about their travel options. The projects provide customized information and training to help people take transit, bike, walk or carpool for some of their trips. Those who don't want information are left alone. To date projects have reached neighborhoods in Portland and Milwaukie. Individualized marketing projects are expected to reduce approximately 19,000,000 vehicle miles of travel per year. See appendix A for details.

Employer and commuter programs

Metro, Oregon DEQ, TriMet, Wilsonville SMART, Vancouver Commute Trip Reduction Program, Portland Transportation Options and TMAs carry out employer and commuter programs. Employer and commuter programs are expected to reduce approximately 47,660,000 vehicle miles of travel per year. See appendix A for details.



Oregon Department of Environmental Quality (DEQ)

DEQ's Employee Commute Options (ECO) rules affect employers in the Portland area with more than 100 employees. The ECO rules are part of Portland's Ozone Maintenance Plan that ensures the Portland-Vancouver area will meet the federal health-based ozone standard in spite of continued population growth. Employers must provide incentives for employee use of alternative commute options. The incentives must have the potential to reduce commute trips to the work site by ten percent from an established baseline. Employee surveys determine the baseline and measure progress toward this goal. DEQ assists employers with the survey and program development and links them to RTO program resources.



Metro Regional Rideshare Program

Metro works with employers to market rideshare services to employees and provides customized rideshare matching services and vanpool incentives. The program targets employment sites with the greatest potential for ridesharing, generally those that are not located close to transit service, but will work with any interested employer. Incentives for commuter vanpools are provided in partnership with ODOT and C-TRAN.



Portland Transportation Options

Programs and activities are designed to remove barriers and provide incentives for people to choose travel options with an ultimate goal of reducing vehicle miles traveled by 10% per capita by 2020. Each year SmartTrips neighborhood programs target a different area within the city to decrease drive alone trips, increase use of

travel options, and increase accessibility and neighborhood livability. This program provides area residents with personalized transit, cycling and walking information, and offers Ten Toe Express walks, Women on Bikes rides and clinics, and Portland By Cycle neighborhood rides.

SmartTrips Downtown reaches thousands of downtown employees with individualized travel options information and incentives. In addition, Portland uses a variety of outreach tools and opportunities to reach residents at community events and coordinates Safe Routes to Schools programs.



TriMet Employer Outreach Program

TriMet has been working with employers since the 1980s to encourage increased use of transit and other travel options among employees. TriMet targets employers affected by Employee Commute Options (ECO) Rules but will work with any interested employer. The program includes one-on-one assistance to employers, transportation coordinator training, transportation fairs, and promotional events in the community. In addition, TriMet works with employers to offer their Universal Pass program and other programs that provide transit passes to employees, sometimes subsidized by the employer.



SMART Options Employer and Community Outreach

The City of Wilsonville SMART Options Outreach Program works with Wilsonville area employers and residents to promote transit and other transportation options. The primary goals of the program are to increase awareness of transportation options available in Wilsonville and the region, reduce drive alone trips, and increase communication between the City of Wilsonville, local businesses of all sizes, community organizations and regional partners.



Southbound Solutions

The Vancouver, Washington Commute Trip Reduction Program conducts Southbound Solutions marketing and outreach to Clark County residents commuting to the Portland Metro area for work in partnership with RTO employer programs and area TMAs. The campaign targets employers with a large Clark County employee base and works with employer transportation coordinators to reach commuters.

Transportation Management Association (TMA) program

TMA's are nonprofit coalitions of local businesses and/or public agencies that work to strengthen partnerships with businesses to reduce traffic congestion and pollution by improving commuting options for their employees. There are six TMA's in the region that develop and implement area specific strategies for reducing drive-alone commute trips. A feasibility study for a South Waterfront TMA is in progress. TMA's receive annual grants from the RTO program to implement trip reduction strategies and are expected to reduce 3,500,000 vehicle miles of travel per year. See appendix A for details.



Clackamas Regional Center TMA

The Clackamas Regional Center Transportation Management Association (CRC-TMA) addresses the growing transportation and transit accessibility needs of the Clackamas Regional Center business community. CRC-TMA is a local organization of business leaders and government agencies that provides solutions to combat traffic congestion and promote transit and other employer/employee transportation options.

Gresham Regional Center TMA

GRCTMA was created in 2001 with the intent of bolstering economic development for the Gresham area by providing safe and viable transportation options for employees, customers and visitors to the regional center.



Lloyd TMA

A non-profit business association representing large and small employers in the Lloyd District of Northeast Portland, Lloyd TMA provides transportation programs and services with clear member benefits and assists employers with ECO Rule compliance. The TMA also provides a forum for businesses and neighborhood associations to work together and coordinates committees working directly on Lloyd District transportation issues.

Swan Island TMA

A project of the Swan Island Business Association, the TMA will expand transportation options for Swan Island employees to facilitate the continuing growth and success of area businesses and improve the movement of people, products, services and freight.



Troutdale TMA

A program of the West Columbia Gorge Chamber of Commerce, Troutdale TMA works to promote the use of transportation options in Troutdale to tourists, employers and employees, and supports the development of infrastructure that supports increased use of travel options.



WTA (Westside Transportation Alliance)

The Westside Transportation Alliance (WTA) is an association of businesses and public agencies in Washington County that offers workplace services and programs to help employees commute to work by transit, carpool, vanpool, walking and cycling.

Traveler information tools and services

The RTO program supports regional traveler information tools and services, provides grants for the development of local cycling and walking maps, and pedestrian and cycling way-finding signs.



CarpoolMatchNW.org

CarpoolMatchNW is the rideshare-matching site serving Oregon and SW Washington. Over 8,800 commuters are currently registered. The service is administered by Metro. The website is hosted and maintained by the city of Portland through an agreement with Metro. CarpoolMatchNW.org is an easy way to find someone to share a ride for trips to work or school or one-time trips for recreation or community events. Metro markets the site to potential customers and provides support to site users.

Bike There! map

Metro's Bike There! map has guided cyclists through the region's streets, paths and bike lanes for 25 years. The map rates through-streets where bicyclists share the road with motorists. Bike There! is sold in area bike shops and retail outlets to generate funds for map updates. Map data is shared with ByCycle.org, an on-line bicycle route-finding tool.

Walk There! 50 Urban Treks in Neighborhoods, Natural Areas and Cities

The guidebook features 50 walking routes in the Portland-Vancouver area and will be published in partnership with Kaiser Permanente in April 2008 to encourage walking for transportation purposes. Guides will be distributed through Kaiser's health education classes, walking events and local walking programs.

Section 5: Goals, objectives and strategies

RTO program goals, objectives and priority strategies are listed below. Strategies were prioritized based on potential to reduce vehicle miles traveled (VMT), potential to increase use of travel options, cost effectiveness and other criteria which are listed in Appendix E. Expected VMT reductions are listed by goal in Appendix A.

Goal 1: Collaborative marketing

Continue a regional collaborative marketing campaign to increase awareness and use of travel options and reduce drive-alone car trips.

Objective 1.1 - Continue a broad-based travel options marketing campaign that invites people to think about how they travel around the region.

Strategy 1.1.1: Drive Less/Save More Campaign

- Work with the Oregon Department of Transportation (ODOT) and campaign partners to continue the Drive Less/Save More marketing campaign. Support implementation of campaign strategies, including media advertising, earned (free) media, web-based advertising, publicity and outreach at community events.
- Develop strategies to support effective use of new and emerging web-based communication tools including social networking web sites.

Objective 1.2: Develop and provide travel options services to targeted communities and audiences.

Strategy 1.2.1: Neighborhood-based individualized marketing projects

- Reach large residential areas that meet specific criteria, such as close proximity to destinations and services, with neighborhood-based individualized marketing projects. Projects will deliver local travel options information and services to interested residents to increase transit, walking and cycling trips and reduce drive-alone auto trips.
- Consider project variations such as targeting specific populations (e.g., seniors) not in the same neighborhood.

Strategy 1.2.2: Promote and distribute Walk There! walking guide

- Promote and support distribution of the “Walk There! 50 Urban Treks” guide book produced by the RTO program in partnership with Kaiser Permanente to support increased levels of walking for transportation purposes.
- Generate earned media publicity that showcases the “Walk There!” routes, related walking events and programs, and disseminates pedestrian encouragement and safety messages.

Strategy 1.2.3: Reach new residents and people who relocate

- Explore, develop and implement strategies to reach new residents of the region and people who move. Relocation is a key time for people to re-evaluate their travel options. Explore opportunities to partner with developers, realtors, tenant and homeowner associations and organizations that work with immigrants to distribute information about travel options and resources.

Strategy 1.2.4: Reach drivers impacted by construction projects

- Explore opportunities to partner with capital project planning and funding partners to reach drivers impacted by construction with information about how to avoid delays as well as information about travel options and services, such as transit options, and vanpool and ride-matching services.

Strategy 1.2.5: Reach families with children

- Explore opportunities to partner with and support Safe Routes to School programs in the region to disseminate information about travel options and services to families with children.

Objective 1.3: Support collaboration and encourage coordination of RTO partner marketing activities.

Strategy 1.3.1: Support collaboration and distribute best-practices information

- Support collaboration of RTO partners' marketing activities through quarterly working group meetings and on-line information sharing.
- Distribute information about relevant best practices through e-newsletters, seminars and brown bag lunch meetings.

Strategy 1.3.2: Regional conference

- Explore opportunities to develop or sponsor a regional conference to disseminate information about effective travel options strategies and best practices to elected officials, land use and transportation planners, business associations and chambers of commerce, employer transportation coordinators, environmental and public health practitioners and officials, and other audiences.

Goal 2: Commuter services

Support employers and commuters to increase the use of travel options for commute trips.

Objective 2.1: Market and provide travel options services to employers and commuters

Strategy 2.1.1: Employer outreach programs and services

- Metro, the Oregon Department of Environmental Quality (DEQ), TriMet, SMART, C-TRAN, local jurisdictions, Transportation Management Associations (TMAs), and other public and private partners will work together to market travel options services to employers and commuters.
- Market WES (Westside Express Service) commuter rail and I-205 light rail (MAX Green Line) to adjacent employment sites.
- Provide vanpool fare incentives and develop a partnership with C-TRAN to provide bi-state vanpool services.
- Partner with the Vancouver Commute Trip Reduction Program to implement the Southbound Solutions marketing project aimed at commuters who travel from Clark County, Washington to the Portland area for work.
- Explore and implement new strategies to reach commuters, such as individualized marketing to clusters of employees in commercial centers and employment areas.

Strategy 2.1.2: Employer-based trip reduction campaigns

- Sponsor regional events and competitions that encourage and increase use of travel options. Provide incentives including prizes and public recognition for participating commuters and employers.

Objective 2.2 - Support coordination of RTO employer outreach marketing activities.

Strategy 2.2.1: Support marketing partners' coordination and collaboration

- Coordinate and target employer outreach marketing program activities to support cost effective delivery of materials and services to employers and commuters.
- Develop a shared online commute tracker tool to support employer incentive programs.

- Explore and develop tools to enhance coordination, such as a shared contact management database.

Goal 3: Traveler information tools

Provide information and services to support increased use of travel options for all trips.

Objective 3.1: Develop and enhance web-based traveler information tools.

Strategy 3.1.1: Update and enhance ride-matching online - CarpoolMatchNW.org

- Continue to sustain and promote a regional web-based ride-matching tool to support carpooling and vanpooling for commute trips, as well as one-time ride matching for recreational and other trip purposes.
- Update CarpoolMatchNW.org to reduce service delivery costs, enhance customer satisfaction and support program measurement.
- Explore opportunities to partner with Washington State DOT and others to enhance bi-state ride-matching services.

Strategy 3.1.2: Explore development of a regional multi-modal trip-planning tool

- Explore development of a regional multi-modal trip-planning tool that provides travel mode choice information, including transit and vanpool routes and schedules, rideshare matching, bicycle routes and bike buddy matching and information about multi-use trails.
- Work with system management partners, area transit operators and private sector partners to identify opportunities for collaboration and cost-sharing to support tool development.

Objective 3.2: Develop maps and collateral materials to support RTO marketing activities.

Strategy 3.2.1: Develop and distribute bike, walking and transit system maps

- Research, develop and distribute maps and local travel options guides to support increased cycling, walking and transit use. Update regional Bike There! map.

Strategy 3.2.2: Research and develop white papers and fact sheets to support consistent messaging in RTO marketing activities.

- Research, develop and distribute white papers or fact sheets around the following topics: RTO program overview; global warming and transportation; congestion and mobility; impact of travel options use on the economy, consumers and business; physical activity and parking management.

Goal 4: Downtowns and centers

Promote and provide services that support increased use of travel options in local downtowns and centers.

Objective 4.1: Leverage investments and unique qualities of local downtowns and centers to make progress toward mode split targets defined in the RTP.

Strategy 4.1.1: Support public-private partnerships

- Develop and support public-private partnerships to leverage public investments and implement an ongoing and increasing level of travel options/transportation demand management strategies in local downtowns and centers.
- Support TMA feasibility studies and provide start-up funds for one to two new TMAs for three years. Update regional TMA policy to better address program goals and enhance local capacity to carry out RTO strategies. Support information sharing among current TMAs and quarterly meetings of TMA directors.
- Develop and enhance partnerships with business associations, chambers of commerce, carsharing organizations and others to advance RTO program goals and objectives in centers.

Strategy 4.1.2: Study and implement parking management strategies

- Provide funds to study and implement parking management strategies, particularly when there is the potential of financial return to support local travel options strategies and programs.

Strategy 4.1.3: Support projects in centers that enhance or promote travel options

- Support projects in centers that enhance or promote travel options, such as end-of-trip facilities and pedestrian and bicycle way-finding signs and systems.
- Support small-scale marketing in centers such as promotion of circulation transit service and guides to local activity.

Strategy 4.1.4: Support location-efficient living strategies

- Support programs that promote and advance location-efficient living strategies that reduce drive-alone auto trips and increase use of transit, walking and cycling in centers.

Goal 5: Measurement

Report progress to aid decision making and encourage innovation.

Objective 5.1: Apply appropriate measures to programs and report findings to support investment in cost-effective strategies.

Strategy 5.1.1: Measure program performance and communicate results

- Metro will provide technical assistance to partners to support program measurement, develop measurement reports, provide data to an independent program evaluator every two years and communicate results to advisory committees and program stakeholders.
- Recipients of RTO grants and funding are expected to track and measure program outputs and outcomes.

Strategy 5.1.2: Regional awareness and customer satisfaction survey

- Conduct a regional public awareness and customer satisfaction survey every two years to track program effectiveness.

Strategy 5.1.3: Information partnerships

- Explore partnerships with other agencies, organizations, and academic institutions that result in useful data for trip planning and traveler information tools. Partner with research and evaluation projects that complement RTO work in the area of parking management, centers, construction and development.

Strategy 5.1.4: Online database

- Explore online tool for storing data, analysis and reporting. Tools would be accessible to RTO partners and centralize information for RTO staff.

Goal 6: Policy and funding

Follow a collaborative decision-making structure that provides program oversight and advances the goals and objectives of the RTP.

Objective 6.1: Support strategic and collaborative program oversight.

- Metro will support meetings and activities of the RTO subcommittee of the Transportation Policy Alternatives Committee (TPAC). The subcommittee will recommend strategic plan updates, annual work plans and budgets, and RTO policies for approval by TPAC, JPACT (Joint Policy Advisory Committee on Transportation) and the Metro Council.

- The subcommittee will review RTO grant applications and select projects that implement strategic plan priorities.

Objective 6.2: Coordinate RTO program strategies and investments with the Regional Mobility Program.

- Develop a senior-level policy task force in partnership with the Regional Mobility Program. The task force will develop and recommend policies and investment strategies to implement the RTP system management concept.

Objective 6.3: Develop regional policies that support travel options strategies

- Continue to track and support the development of RTP policies and other state, regional and local policies that support increased use of travel options.

Objective 6.4: Develop an equitable and sustainable funding plan.

- Develop grant selection criteria that consider environmental justice impacts and regional equity.
- Seek additional funds to leverage federal Congestion Mitigation Air Quality (CMAQ) funding and support RTO program priorities including grants, sponsorships and cost-sharing partnerships. Secure funds from ODOT to continue the Drive Less/Save More marketing campaign.

Appendices

- A. Expected reductions in vehicle miles traveled and related benefits**
- B. Program budgets**
- C. Preferred grant projects**
- D. Employer outreach work program**
- E. Summary of RTP goals and supporting RTO strategies**
- F. Plan development process**
- G. Environment scan**

A. Expected reductions in vehicle miles traveled and related benefits

Implementing the RTO strategic plan is expected to reduce more vehicle miles traveled and increased benefits to air quality, gasoline conserved and the savings from conserving gasoline. Vehicle miles reduced (VMR) annually is expected to increase from the 2006 approximation of 42,000,000 annually to 101,000,000 annually; 140% increase. The reasoning for this sharp increase is based on:

- Past performance
- Improving measurement
- Small increases in budget
- Cost-effective investments, both existing and new

There are several reasons, known in advance, why the expected VMR might not be reached. They are:

- An RTO region-wide survey scheduled for spring 2008 will help estimate the marketing and outreach programs that overlap (e.g., the same person is reached by 2 or 3 programs). The extent of this overlap will determine if fewer VMR are expected.
- RTO Grants are likely to be diverse and some are likely to go for marketing efforts raising awareness but not attributed to VMR. Some may favor outcomes such as physical activity or transportation options for seniors. Some may pay for end-of-trip facilities like bike racks that have a longer return on investment in VMR.
- If budgets are reduced, measurement is likely to be reduced making both harder to reach the expected VMR and harder to estimate VMR.

Awareness of, participation in, and satisfaction with travel options programs are all expected to grow. RTO is working to benchmark and then track each of these measures during the course of this strategic plan.

The following expected reductions in vehicle miles traveled are rooted in the success of past efforts and the cost of those efforts. Metro RTO staff created a factor for each budget expenditure to illustrate expected VMR. More method details follow.

Expenditures	FY09	FY10	FY11	FY12	FY13
Program Admin & Coordination	n/a	n/a	n/a	N/a	n/a
Collaborative Marketing*	2,900,000	2,900,000	2,800,000	2,700,000	2,600,000
RTO Grants	8,900,000	8,900,000	10,000,000	10,000,000	9,000,000
TMA	3,500,000	3,500,000	3,500,000	3,500,000	3,500,000
Commuter	45,000,000	46,300,000	47,600,000	49,000,000	50,400,000
Information Tools	400,000	400,000	400,000	400,000	400,000
Vanpool	3,300,000	3,400,000	3,500,000	3,600,000	3,800,000
Individualized Marketing	0	15,400,000	28,100,000	21,900,000	31,500,000
Evaluation	n/a	n/a	n/a	N/a	n/a
Estimated Total	64,000,000	81,000,000	96,000,000	91,000,000**	101,000,000

Table. Expected annual vehicle miles reduced by expenditure. Source: Metro

*One component of collaborative marketing has been benchmarked: Drive Less/Save More. Regional awareness was 27% in spring 2007. RTO staff did not estimate how this percentage is likely to increase.

**The dip in expected VMR is related to the timing of individualized marketing projects. RTO has budgeted for large-scale individualized marketing in 2009 and 2010. Practitioners in Australia and Portland believe that the effect of individualized marketing wears out after time. Portland State University will be studying this effect in detail. For now, a rule-of-thumb is applied: individualized marketing affects transportation choice for 5 years. Therefore, figures above have been reduced by 1/5th of the original amount each year for 5 years. In FY12, the effect from several large-scale individualized marketing projects is expected to wane and then another project in FY13 will pick up the VMR.

RTO Staff calculated expected VMR to help illustrate the potential impact of implementing the RTO 5-year strategic plan. They are not outputs of Metro transportation modeling. RTO Staff used the average between high and low VMR estimates from 2005-2006 evaluation. Past budgeted amounts were then divided by VMR. For example:

\$20,000 spent on a program that reduced 1,000,000 VMR = \$0.02/VMR

If expenditures show \$40,000 in the Strategic Plan for the same or a similar strategy:

\$40,000 * \$0.02

1 VMR = 2,000,000 VMR

If no similar project was available, \$0.05/VMR was used.

\$10,000 buying one VMR per nickel = \$10,000 divided by .05 = 200,000 VMR.

VMR were not estimated for marketing projects to raise awareness or expenditures for administration, marketing coordination, evaluation and measurement.

The following is simply an average of the five years of the strategic plan to illustrate a per-year figure.

Expenditures	Total	Average per year
Program Admin & Marketing Coordination	n/a	N/a
Collaborative Marketing	13,900,000	2,780,000
RTO Grants	46,800,000	9,260,000
TMA	17,500,000	3,500,000
Commuter	238,300,000	47,660,000
Information Tools	2,000,000	400,000
Vanpool	17,600,000	3,520,000
Individualized Marketing	96,900,000	19,380,000
Evaluation & Measurement	n/a	n/a
Estimated Total	433,000,000	86,600,000

Table. Total and average annual reduction in vehicle-miles traveled by expenditures. Source: Metro

VMR means reduced tailpipe emissions. Metro RTO staff collaborated with Oregon Department of Environmental Quality to estimate per-mile emission factors for passenger vehicles in the region. Emission factors were current as of 2006. The following table shows the amount of emissions expected to be reduced – a direct factor of the VMR in the tables above.

Emissions reduced	FY09	FY10	FY11	FY12	FY13
Smog producing volatile organic compounds	91 tons	115 tons	137 tons	129 tons	144 tons
Oxides of nitrogen and carbon monoxide	1,100 tons	1,400 tons	1,700 tons	1,600 tons	1,800 tons
Greenhouse gas (CO ₂)	32,000 tons	40,000 tons	47,000 tons	45,000 tons	50,000 tons
Carcinogenic particulate matter (PM ₁₀ and PM _{2.5})	2.7 tons	3.4 tons	4.1 tons	3.8 tons	4.3 tons
Air toxics (Benzene and four others)	3.6 tons	4.5 tons	5.4 tons	5.1 tons	5.7 tons

Table. Expected annual reduction of tailpipe emissions. Source: Metro estimates using DEQ emission factors

Emissions reduced	Total	Average per year
Smog producing volatile organic compounds	616 tons	123 tons
Oxides of nitrogen and carbon monoxide	7,600 tons	1,500 tons
Greenhouse gas (CO ₂)	214,000 tons	42,600 tons
Carcinogenic particulate matter (PM ₁₀ and PM _{2.5})	18.3 tons	3.7 tons
Air toxics (Benzene and four others)	24.2 tons	4.8 tons

Table. Total and average annual reduction of tailpipe emissions. Source: Metro estimates using DEQ emission factors

DEQ provided an estimate of gas consumption for the average passenger vehicle in the region: 20.56 miles per gallon. Metro RTO staff chose \$3 per gallon as a rounded average of the cost per gallon of gas. The following table shows the gallons of gas saved and resulting savings - a direct factor of the VMR in the tables above.

Gas	FY09	FY10	FY11	FY12	FY13
Gallons of gasoline	3,100,000	3,900,000	4,700,000	4,400,000	4,900,000
Savings	\$9,300,000	\$11,700,000	\$14,100,000	\$13,200,000	\$14,700,000

Table. Expected annual reduction of gas consumption and the resulting savings. Source: Metro estimates using DEQ average miles-per-gallon

Gas	Total	Average per year
Gallons of gasoline	21,100,000	4,220,000
Savings	\$63,300,000	\$12,660,000

Table. Total and average annual reduction of gas consumption and the resulting savings. Source: Metro estimates using DEQ average miles-per-gallon

Metro RTO Staff estimated how many fewer auto trips will be made each day. The estimate divides VMR by 365 days and then by the average drive-alone distance in the region for a one-way trip, times 2 to make it a round trip. While this is a very in-exact method, the estimate is validated by results from auto trips reduced by the employer program (captured in employee commute options (ECO) surveys). To illustrate the impact this set of cars has on the transportation system, RTO Staff divided by an average full-size car length of 16 feet, 4 inches and stretched that out over one lane, bumper-to-bumper.

	FY09	FY10	FY11	FY12	FY13
Autos	14,000	18,000	21,000	20,000	22,000
Miles of autos placed bumper-to-bumper	43	56	65	62	68

Table. Expected daily reduction in autos using the transportation system and an illustration of their potential impact. Source: Metro estimates using Metro average for a drive-alone trip length

B. Base and preferred program budgets

RTO STRATEGIC PLAN BUDGET 2008-2013					
Revenues	(PROPOSED) FY 08-09	(PROJECTED) FY 09-10	(PROJECTED) FY 10-11	(PROJECTED) FY 11-12	(PROJECTED) FY 12-13
a. MTIP	1,988,790	1,800,000	2,397,000	2,000,000	2,500,000
MTIP Individualized Marketing	500,000				
b. ODOT Marketing	600,000	500,000	500,000	500,000	500,000
BETC	34,000	40,000	41,200	42,436	43,709
Bike There!	30,000	30,000	30,000	30,000	30,000
C-Tran	100,000	100,000	103,000	103,000	106,090
ODOT Vanpool	125,268	150,000	154,500	154,500	159,135
Metro match	63,069	64,960	66,908	68,915	70,982
Partners match	226,504	200,265	262,039	221,267	273,093
Total revenues	3,667,631	2,885,225	3,554,647	3,120,118	3,683,009
Expenditures					
Program Admin & Marketing Coordination	55,684	57,355	59,075	60,847	62,672
Collaborative Marketing	825,443	850,206	875,712	901,983	929,042
RTO Grants	607,948	365,397	467,721	610,288	489,585
c. TMA	311,553	284,500	173,500	173,250	173,250
Commuter	231,294	238,232	245,378	252,739	260,321
TriMet	412,409	424,781	437,524	450,649	464,168
SMART	66,713	68,714	70,775	72,898	75,084
d. Information Tools/Bike There!	60,000	80,000	80,000	50,000	50,000
Regional Vanpool	296,916	305,823	314,997	324,446	334,179
Individualized Marketing	595,575		613,442		615,000
Evaluation & Measurement	204,095	210,217	216,523	223,018	229,708
Total expenditures	3,667,631	2,885,225	3,554,647	3,120,118	3,683,009

All expenditures include required matching funds.

- a. 10-11 MTIP includes \$500,000 for ind. mktg. Also projected \$500,000 for 12-13.
- b. Assumes ongoing funding from ODOT.
- c. Assumes six existing TMAs plus a seventh (S. Waterfront) in start-up phase until FY 11-12. No inflation factored.
- d. Includes cost of participation in WSDOT ridematching system, plus partial funding for enhanced trip planning capabilities.

DRAFT RTO Preferred Budget

Purpose: The purpose of the following list to form the basis of the RTO programs preferred budget. The 5-Year RTO Strategic Plan meets the current RTO budget for the years 2008-2013. RTO partners and staff aspire to grow the program. The following is a list of promising ways to allocate \$3 million in additional revenue annually.

Rank*	Short Name	Draft Strategy Description	Increase to Annual Budget
1	Employer Outreach	<ul style="list-style-type: none"> - Double the effort on employer outreach: <ul style="list-style-type: none"> - Approximately 200,000 employees are served by the employer outreach program (around 1/4 of employees in the region). Approximately 2,000 employment sites are served (possibly only 1/20th of all employment sites). - Increase rideshare services. - Explore and implement individualized marketing to employees. 	\$900,000
2	Information Tools	<ul style="list-style-type: none"> - Implement a multi-modal trip planner strategy that makes the best use of public resources. Most likely, public resources are best spent on data collection while private partners create the interface and features (e.g., Traffic.com). - 50/50 bike/walk map program offered to local jurisdictions interested in matching 50% of the design, production, marketing and distribution costs. - 30/70 walking guide program where RTO would offer map making and measurement service up to 30% of the cost to design, produce, market and distribute a walking guide program. 	\$400,000
3	Region-wide New Resident Program	<ul style="list-style-type: none"> - Depending on the availability and prices for specialized lists of who new residents are (e.g., relocated within the region, relocated to "bedroom community," young, retired, etc.) - Reach ALL new residents in the region – if there is 1% growth per year, that is approximately 13,000 new residents. - Provide 6 months of individualized marketing services to help new residents make efficient use of their location and options. - Offer TODs and other location-efficient developments a slightly customizable version of the new resident program. - Emphasize sustainability and financial savings. 	\$400,000
3	Region-wide Parking Management Implementation	<ul style="list-style-type: none"> - Hire or contract with a parking planner to lead implementation of context-sensitive solutions across the region. This effort follows the TGM for Beaverton and Hillsboro. To constitute a region-wide project, the effort would simultaneously cover 10 additional centers. One central issue would be addressed by rolling out parking management in a concentrated effort: business competition between centers. - Offer to study feasibility of carsharing in center and implement a program to locate several cars in publicly accessible areas. 	\$300,000
4	Centers Infrastructure and Marketing	<ul style="list-style-type: none"> - Increase public private partnerships. - Bike rack cost share program (Minneapolis offers 50/50 for certain locations). Interested Local jurisdictions would apply and install racks. Projects would encourage using a car parking space in prominent, accessible areas of the center. Project could include elements such as the "bike oases" on SE Hawthorne Blvd. in Portland – sheltering roof, etc. - 50/50 way-finding cost sharing program would fund projects that connect walkers and bicyclists to public facilities (libraries, parks, transit centers, government services), historic sites and key shopping/service areas. Way finding elements could include signage, kiosks and sidewalk or bike lane treatments to designate route (e.g., Boston's bricked Freedom Trail). - Provide a package of marketing and outreach services to build ridership on new circulator transit service in centers. Circulator service should be available at least 12 hours per day. - Offer to study feasibility of carsharing in center and implement a program to locate several cars in publically accessible spaces. 	\$400,000
5	Regional Roll-out of Individualized Marketing	<ul style="list-style-type: none"> Increase to 1 project per year. Base program now offers one project every two years. 	\$250,000

6	Options Before, During and After Construction	<ul style="list-style-type: none"> - Engage road users during construction projects of all sizes. Promote options before, during and after. - Leverage media and messaging campaigns initiated by ODOT or other jurisdiction. Evidence from Seattle's recent I-5 project shows that people make a lot of individual decisions that add up to no congestion. Media and messaging of transportation options allows people to make these individual decisions. - While projects have a role for Community/Public Affairs, they often suggest how to avoid delay but do not suggest other options. RTO would coordinate travel options messaging region-wide. 	\$150,000
7	New Methods to Reach New Markets	<ul style="list-style-type: none"> - Staff to interact daily in blogosphere and be media-liaison. RTO's commuter/traveler blog could be run like an ongoing focus group on options and related issues. - Run promotions such as commute challenges. This could be a year-round race with a structured incentive/rewards program. - Continue building DLSSM brand. 	\$150,000
(not ranked)	Reduce Idling	<ul style="list-style-type: none"> - Explore and implement a program to reduce idling. For example, place signage on lift bridges. Measure before and after. 	\$50,000
<p>*In all cases, ranks are the overall rank given by stakeholders at the 2nd workshop for at least one element of the strategy. Two strategies tied for 3rd. Most but not all strategies are included within these add packages. "Less idling" was added by staff for consideration.</p>			

C. Preferred RTO grant projects

The RTO subcommittee identified priority strategies and projects as part of the strategic plan development process. Local jurisdictions, business and community groups and other non-profit organizations will be invited to submit proposals to the RTO subcommittee for grants and will be encouraged to use this preferred projects list as a reference for program and project development. Section 5 provides more details about each strategy.

- Neighborhood-based individualized marketing projects.
- Target audience (i.e. seniors, youth, etc.) individualized marketing projects.
- Employer outreach programs including trip reduction campaigns and competitions.
- Walking and cycling encouragement services and programs.
- Local walking and cycling maps.
- Marketing and outreach to new residents and people who relocate.
- Marketing and outreach to drivers impacted by construction projects to reduce delays and promote travel options.
- Marketing and outreach to families with children, including Safe Routes to School programs.
- Public-private partnerships that advance RTO program goals, such as TMA feasibility studies and start-up funding, grants for ongoing TMA marketing activities, carsharing feasibility studies and implementation support.
- Parking management studies and strategy implementation.
- End-of-trip facilities, such as bicycle racks, lockers and bike stations.
- Pedestrian and bicycle way-finding signs and systems in centers.
- Small-scale marketing projects in centers such as promotion of circulation transit service and guides to local activity.
- Location-efficient living strategies.

D. Employer outreach work programs

Several regional partners, chief among these being Metro, TriMet and SMART, carry out the employer and commuter outreach goals, objectives and strategies identified in this plan. The partners encourage employers to offer incentives and provide facilities that support employee use of travel options, provide technical assistance to employers to support compliance with the Oregon ECO (Employee Commute Options) Rule and use of the Oregon Business Energy Tax Credit (BETC) program, and provide training for Employee Transportation Coordinators. This description will summarize these three partners' work plans and expected outcomes for FY 2009 and 2010.

Additionally, it is noted that TMAs are also involved in Commuter programs, but their emphasis on this program work varies, depending on the TMA's particular areas of focus. Therefore, they are not included in this description.

Metro commuter programs and services

Employer and commuter outreach

Public outreach events consist primarily of taking part in employer and community events. At employer events the focus is on providing ride-matching information and assistance to employees, and promoting Metro programs CarpoolMatchNW.org and Metro VanPool. At the community events the focus is broadened to include information covering the spectrum of all of people's trips, including commute trips, through the Drive Less. Save More. collaborative marketing campaign. Each event requires between three and eight hours of preparation and outreach time. Over the next two fiscal years Metro will participate in up to three employer events and approximately one community festival each month.

CarpoolMatchNW.org

Approximately 8,800 people are registered in CarpoolMatchNW.org, the region's ride-matching website and database. The current pace of growth in the number of registrants on CarpoolMatchNW has been 30 percent annually. Assuming a 20 percent rate of growth, it is expected that an additional 1,700 new registrations will occur in FY 2009 and 2,040 new registrations in FY 2010, bringing the total number of registrants to over 12,000.

Tasks related to this objective include promotion of the site, fielding phone calls and emails, and purging the database on a periodic basis.

In 2008, it is anticipated that the functionality of the region's ride-matching website will be enhanced and updated as Metro joins a consortium of public and private non-profit agencies led by Washington State DOT (WSDOT). The WSDOT project will result in the procurement of a third-party ride-matching system that will cover Washington, Idaho and Oregon. The new system will feature increased automation of many administrative functions. As such, it is hoped, but not yet assured that administrative time requirements for maintaining CarpoolMatchNW.org can be reduced or held level as the number of registrants grows.

Metro VanPool

Metro assumed operations of the regional vanpool program from TriMet in July 2006. Beginning in February 2007, a new incentive funding program was initiated and new marketing efforts began. Using FTA Capital Cost of Contracting guidelines, eligible vanpools are funded at 50 percent of the total lease cost, which covers the capital portion of the van cost. Since this funding mechanism was implemented, along with a corresponding marketing effort, the program has seen a net increase of 10 vans, bringing the program total to 26 as of February 2008. Assuming this same rate of growth, there will be a expected 76 vans in the program by 2013.

The program was launched as a pilot and is still in the refinement process. There are several tasks to be undertaken in the next two years. Given the fact that the Portland commuter market covers portions of two states, there is still work to be done to develop a long-term funding and administrative mechanism that maximizes the various regional partners' strengths and opportunities.

A. Funding – The vanpool program currently has three primary sources of funding, with various restrictions upon their use.

- C-TRAN administers CMAQ funding for the Vancouver, Washington region and has indicated they will provide funding for vans originating in Washington. An agreement between Metro and C-TRAN is being drafted. C-TRAN has expressed interest in looking at how best to operate and fund a regional vanpool program, drawing on the strengths and opportunities that exist both in Oregon and Washington. Currently 12 vans are funded with this source.
- ODOT provides funding for vans traveling a minimum of 20 miles one-way. ODOT stipulates that its funding is to be used for the first two years of a van's existence, then switched to another source of support, typically, 5307 funds. Nine vans are funded by ODOT. Two vans will reach their allotted 24 months of ODOT assistance by July 1, 2008 and will need an alternative source of funding in order to maintain the same passenger rate. The remaining seven vans will lose ODOT funding in 2009.
- A portion of the RTO program MTIP allocation designated for vanpool incentives is the third source of funding. Five vans are funded with MTIP dollars. These funds are the least restrictive of the three sources available to the vanpool program, but are also the most in demand by other RTO programs. Thus, their availability is limited.

While not directly used in the vanpool program, a fourth funding source is available from the Oregon Department of Energy's Business Energy Tax Credit (BETC) program. Vanpool operations are an eligible project under BETC rules. Funds generated through this funding source are considered locally generated and are therefore used as a portion of the local match required for federal funds, as well as for program expenses that are ineligible for federal funding. Applying for BETC requires tracking the mileage and cost of the vanpool program that is in turn applied to a formula to determine the amount of funding received. The Department of Energy pays 35 percent of eligible project costs in the form of a state tax credit.

Since Metro is a government agency and as such does not have a state tax liability, these tax credits are “sold” at a rate of 28 percent to a business with a tax liability that in turn takes the credit against their taxable liability.

As alluded to above, there are significantly different vanpool funding models in Oregon and Washington, based largely on the difference in scale between the two states’ programs. The Oregon model is to use public dollars to buy down the cost of leased vans from third-party vendors. ODOT does provide start-up grant funding for vanpools, but does not provide funding for vehicle purchases. There are currently around 45 vanpools operated by rideshare agencies in Oregon.

Washington, on the other hand, has over 1,000 vanpools in operation, virtually all of which are publicly owned. WSDOT’s program provides funding to transit districts for van purchases, thus providing a greater degree of control over costs and usage of the vehicles.

B. Administration – A long-term program management model needs to be determined. Metro is interested in exploring how best to partner with C-TRAN to improve service delivery and increase cost effectiveness. C-TRAN is interested in increasing their regional involvement in vanpooling and has indicated to Metro that they want to jointly explore all of the funding and administrative options available to both agencies, including switching the vans over to the WSDOT program and acting as the recipient of 5307 funds generated by the vanpool program. (Currently, the vanpool program does not have a 5307 funding partner and is therefore not receiving a significant source of support for which it is otherwise eligible.) Metro and C-TRAN will discuss this issue in early 2008 and develop a recommended administrative structure based on the outcomes of those conversations.

SMART Options Employer and Community Outreach

The City of Wilsonville Outreach plan is designed to enhance the relationship between the City of Wilsonville/SMART and local employers. The primary goals of the SMART Options program are to:

- Increase awareness of transportation options available in Wilsonville and the region
- Reduce drive alone trips
- Strengthen and increase communication between SMART, the City of Wilsonville, Chamber of Commerce, local businesses of all sizes, and community organizations.

Program goals for FY 2009 and 2010 are to promote and encourage ridership on SMART and Westside Express Service (WES), and promote regional travel options.

Business Outreach

SMART staff will meet one-on-one with Wilsonville’s largest employers to present WES information, new Transit Master Plan, proposed future-funding strategy and BETC opportunities. SMART will interview these groups to learn more about their organization, needs and concerns, seek their involvement as a BETC partner, and invite to grand opening

events for WES. In addition, all 900 Wilsonville Employers will receive an invitation to open houses and other meetings regarding WES, the Transit Master Plan, future funding strategies, BETC and transportation options available in the region. Other tasks include:

- Assist the 25 Wilsonville DEQ-ECO affected employers with rule compliance. Provide survey design and analysis, assistance with Trip Reduction Plans and onsite incentive programs.
- Promote the Walk SMART program and offer incentives and presentations at company wellness fairs.
- Promote regional travel options campaigns: Carefree Commuter Challenge, Drive Less Save More, Carpool Match NW, Metro Vanpool, and Bike Commute Challenge.
- Promote new PCC TDM Class – recruit students to attend the new PCC class offered through WTA.
- Collaborative project with local High School and ODOT to design pedestrian and bicycle improvements for under the Interstate 5 exit 283 underpass.

SMART projects the annual VMT reduction due to marketing and outreach of commuter rail and new SMART service of 224,000 VMT. This number is conservative and does not capture other TDM related activities that encourage carpool, bike, walk and other non SOV modes of transportation.

TriMet Employer Program

In 2007-2008 there were 253 employers on annual transit programs. The goal is to increase that number by at least five percent for a total of 266 annual programs in 2008-2009.

In 2007 - 2008 there were 245 employers on monthly transit programs. The goal is to increase that number by at least five percent for a total of 257 monthly programs in 2008-2009.

In FY 2010 the program will focus on outreach to employers along the MAX Green Line, beginning revenue service in September of 2009. The goal is to reach employers within a ½ mile of the new stations as well as those located along connecting bus lines. The details of this outreach are still being developed and should be available by November of 2008.

The plan is to increase annual employer programs by five percent, totaling 279 annual programs in FY 2010.

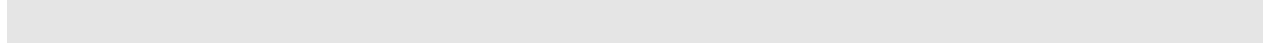
The plan is to increase monthly employer programs by five percent, which would mean a total of 270 monthly programs in FY 2010.

Westside Express Service (WES)

In addition to the usual activities of working with employers throughout the region to develop and maintain transportation programs, in FY 2009 TriMet will also focus on Westside Express

Service (WES) outreach. This new commuter rail line will begin revenue service in the fall of 2008. The outreach process will include sending a direct mail piece to 2,150 employers within ½ mile of a WES station or ¼ mile of bus stop with connecting service to WES and following up via phone to all employers with 20+ employees (845).

To achieve this, TriMet staff will make an average of 25 calls a week during March, April and May with the goal of setting up approximately 120 transportation fairs taking place in April, May and June. Information shared at transportation fairs will include all non-SOV options.



E. Summary of RTP goals and supporting RTO strategies

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
<p>Goal 1 Foster vibrant communities and efficient urban form Land use and transportation infrastructure decisions are linked to promote an efficient and compact urban form that fosters vibrant, healthy communities; optimizes public investments; and supports active transportation options, jobs, schools, shopping, services, recreational opportunities and housing proximity.</p>	<p>Objective 1.1 Compact urban form and design - Use transportation investments to reinforce growth in, and multimodal access to 2040 Target Areas and ensure that development in 2040 Target Areas is consistent with and supports the transportation investments.</p> <p>Objective 1.2 Parking Management - Minimize the amount of land dedicated to vehicle parking.</p>	<p>1.1.4. Support the development of tools aimed at reducing vehicle miles traveled per person, including transit-oriented development, car sharing, location efficient mortgage.</p> <p>1.2.4. Manage and optimize the efficient use of public and commercial parking in 2040 target areas.</p>	<p>Objective 4.1- Leverage investments and unique qualities of local downtowns and centers to make progress toward mode split target defined in the RTP.</p> <p>Strategy 4.1.1. Support public-private partnerships.</p> <p>Strategy 4.1.2. Study and implement parking management strategies.</p> <p>Strategy 4.1.3. Support projects in centers that enhance or promote travel options.</p> <p>Strategy 4.1.4. Support location-efficient living strategies.</p>
<p>Goal 2 Sustain economic competitiveness and prosperity Multi-modal transportation infrastructure and services support the region's well-being and a diverse, innovative, sustainable and growing regional and state economy through the reliable and efficient movement of people, freight, goods, services and information within the region as well as to destinations</p>	<p>Objective 2.3 Regional Mobility - Maintain sufficient total person-trip and freight capacity among the various modes operating in the Regional Mobility Corridors to allow reasonable and reliable travel times through those corridors.</p> <p>Objective 2.5 Job Retention and Creation – Foster the growth of new businesses and retain those that are already located in the region.</p>	<p>2.3.2. Implement a regional congestion management program, including coordinated regional bus service, traffic operations improvements, transit, ridesharing, telecommuting incentives, and pricing strategies.</p>	<p>Objective 2.1 Market and provide travel options services to employers and commuters.</p> <p>Strategy 2.1.1. Employer outreach programs and services.</p> <p>Strategy 2.1.2. Employer-based trip reduction campaigns.</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
outside the region.			
<p>Goal 3: Expand Transportation Choices Multi-modal transportation infrastructure and services provide all residents of the region with affordable and equitable options for accessing housing, jobs, services, shopping, educational, cultural and recreational opportunities, and facilitate competitive choices for goods movement for all businesses in the region.</p>	<p>Objective 3.1 Travel Choices - Make progress toward Non-SOV modal targets for increased walking, bicycling, use of transit and shared ride and reduced reliance on the automobile and drive alone trips.</p> <p>Objective 3.2 Vehicle Miles of Travel - Reduce vehicle miles traveled per capita.</p> <p>Objective 3.3 Equitable Access and Barrier Free Transportation - Provide affordable and equitable access to travel choices and serve the needs of all people and businesses, including people with low income, children, elders and people with disabilities, to connect with jobs, educational, services, recreation, social and cultural activities.</p>	<p>3.1.7. Form public/private partnerships such as Transportation Management Associations to increase education about transportation choices and support meeting non-SOV targets by land use type.</p> <p>3.1.8. Increase development and use of traveler information tools to inform choices.</p> <p>3.1.9. Incorporate car sharing into settings where the strategy is likely to reduce net vehicle miles traveled and provide an alternative to private car ownership.</p>	<p>Objective 4.1 Leverage investments and unique qualities of local downtowns and centers to make progress toward mode split targets defined in the RTP.</p> <p>Strategy 4.1.1. Support public-private partnerships</p> <p>Strategy 4.1.2. Study and implement parking management strategies</p> <p>Strategy 4.1.3 Support projects in centers that enhance or promote travel options</p> <p>Objective 3.1 Develop and enhance web-based traveler information tools.</p> <p>Strategy 3.1.1. Update and enhance ride-matching online - CarpoolMatchNW.org.</p> <p>Strategy 3.1.2. Explore development of a regional multi-modal trip-planning tool.</p> <p>Objective 1.1 Continue a broad based travel options marketing campaign that invites people to think about how they travel around the region.</p> <p>Strategy 1.1.1. Drive Less/Save More Campaign.</p> <p>(Continued on next page)</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
<p>Goal 3: Expand Transportation Choices</p>			<p>Objective 1.2 Develop and provide travel options services to targeted communities and audiences.</p> <p>Strategy 1.2.1. Neighborhood-based individualized marketing projects.</p> <p>Strategy 1.2.2. Promote and distribute Walk There! walking guide.</p> <p>Strategy 1.2.3. Reach new residents and people who relocate.</p> <p>Strategy 1.2.4. Reach drivers impacted by construction projects.</p> <p>Strategy 1.2.5. Reach families with children.</p>
<p>Goal 4 Emphasize effective and efficient management of the transportation system Multi-modal transportation infrastructure and services are well-managed and optimized to improve travel conditions and operations, and maximize the multi-modal capacity and operating performance of existing and future transportation infrastructure and</p>	<p>Objective 4.2 Demand Management – Implement services, incentives, supportive infrastructure and increase awareness of travel options to reduce drive alone trips and protect reliability, consistent with Transportation System Management and Operations (TSMO) Concept.</p>	<p>4.2.1. Implement investments that use the Transportation System Management and Operations (TSMO) Concept to increase awareness of travel options by means of services, incentives, and supportive infrastructure.</p> <p>4.2.2. Promote private and public sector programs and services that encourage employees to use non-SOV modes or change commuting patterns, such as telecommuting, flexible work hours and/or compressed work weeks.</p> <p>(Continued on next</p>	<p>All RTO objectives and strategies support RTP Goal 4.</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
services.		<p>page)</p> <p>4.2.3. Launch public-private partnerships in 2040 centers and corridors to encourage residents, employees and others to use non-SOV modes to foster increased economic activity in these areas.</p> <p>4.2.4. Continue rideshare tools and incentives from areas or at hours of the day under-served by transit.</p> <p>4.2.5. Consider vanpool strategy to incubate new transit service.</p> <p>4.2.6. Further study of market-based strategies, such as parking pricing, employer-based parking-cash outs and restructuring parking rates.</p> <p>4.2.7. Support ridesharing programs, park-and-ride programs, telecommuting programs, and transit benefit programs to increase peak-period travel options and reduce the rate of growth of vehicle miles traveled.</p> <p>4.2.8. Support transit-oriented development to encourage transit use.</p> <p>4.2.9. Include employers and transportation</p>	

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
		management associations in project development.	
<p>Goal 5: Enhance Safety and Security Multi-modal transportation infrastructure and services are safe and secure for the public and for goods movement.</p>	<p>Objective 5.1 Operational and Public Safety - Reduce fatalities, serious injuries and crashes per capita for all modes of travel through investments that address safety-related deficiencies.</p>	<p>5.1.4. Promote safe use of the transportation system by motorists, bicyclists and pedestrians through a public awareness program and safety education programs.</p> <p>5.1.8. Promote transportation infrastructure that supports safe and secure walking and bicycling routes for people of all ages and abilities.</p>	<p>Objective 1.2 Develop and provide travel options services to targeted communities and audiences.</p> <p>Strategy 1.2.1. Neighborhood-based individualized marketing projects.</p> <p>Strategy 1.2.2. Promote and distribute Walk There! walking guide.</p> <p>Objective 3.2 Develop maps and collateral materials to support RTO marketing activities.</p> <p>Strategy 3.2.1. Develop and distribute bike, walking and transit system maps</p>
<p>Goal 6: Promote Environmental Stewardship</p> <p>Promote responsible stewardship of the region's natural, community, and cultural resources during planning, design, construction and management of multi-modal transportation infrastructure and services.</p>	<p>Objective 6.2 Clean Air – Reduce transportation-related vehicle emissions to improve air quality so that as growth occurs, the view of the Cascades and the Coast Range from within the region are maintained and greenhouse gas emissions are reduced.</p> <p>Objective 6.4 Energy and Land Consumption - Reduce transportation-related energy and land consumption and the region's dependence on unstable energy sources.</p>	<p>6.2.2. Encourage use of all low- or zero-emission modes of travel (e.g., transit, telecommuting, zero-emissions vehicles, carpooling, vanpooling, bicycles and walking)</p> <p>6.4.1. Implement investments that increase efficiency of the transportation network (e.g., reduce idling and corresponding fuel consumption) or supports efficient tripmaking decisions in the region.</p> <p>6.4.2. Promote and implement strategies to increase use of</p>	<p>All RTO objectives and strategies support RTP Goal 6.</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
		alternative energy vehicles and non-SOV travel modes.	
<p>Goal 7: Enhance Human Health</p> <p>Multi-modal transportation infrastructure and services enhance quality of human health by providing safe, comfortable and convenient options that support active living and physical activity, and minimize transportation-related pollution that negatively impacts human health.</p>	<p>Objective 7.1 Active Living – Provide safe, comfortable and convenient transportation options that support active living and physical activity to meet daily needs and access services.</p>	<p>7.1.4. Remove barriers and reinforce compact development patterns to encourage walking and bicycling to basic services and nearby activities as a way to integrate exercise into daily activity</p>	<p>Objective 1.2 Develop and provide travel options services to targeted communities and audiences.</p> <p>Strategy 1.2.1. Neighborhood-based individualized marketing projects.</p> <p>Strategy 1.2.2. Promote and distribute Walk There! walking guide.</p> <p>Objective 4. Leverage investments and unique qualities of local downtowns and centers to make progress toward mode split target defined in the RTP.</p> <p>Strategy 4.1.1. Support public-private partnerships.</p> <p>Strategy 4.1.2. Study and implement parking management strategies.</p> <p>Strategy 4.1.3. Support projects in centers that enhance or promote travel options.</p> <p>Strategy 4.1.4. Support location-efficient living strategies</p>
<p>Goal 8: Ensure Equity</p> <p>Regional transportation planning, programs and investment</p>	<p>Objective 8.1 Environmental Justice – Ensure benefits and impacts of investments are equitably distributed.</p>		<p>Objective 6.4 Develop an equitable and sustainable funding plan.</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
<p>decisions ensure the benefits and adverse impacts of investments and programs are equitably distributed among population demographics and geography, considering different parts of the region and census block groups with different incomes, races and ethnicities.</p>			
<p>Goal 9: Ensure Fiscal Stewardship Regional transportation planning and investment decisions ensure the best return on public investments in infrastructure and programs.</p>	<p>Objective 9.2 Maximize Return on Public Investment - Make transportation investment decisions that use public resources effectively and efficiently, using performance-based planning.</p> <p>Objective 9.3 Stable and Innovative Funding – Stabilize existing transportation revenue while securing new and innovative long-term sources of funding adequate to build, operate and maintain the regional transportation system for all modes of travel at the federal, state, regional and local level.</p>		<p>Objective 5.1 Apply appropriate measures to programs and report findings to support investment in cost-effective strategies.</p> <p>Strategy 5.1.1. Measure program performance and communicate results</p> <p>Objective 6.1 Support strategic and collaborative program oversight.</p> <p>Objective 6.4 Develop an equitable and sustainable funding plan.</p>
<p>Goal 10: Deliver Accountability The region's government, business, institutional and community leaders work together in an open and transparent manner so the public has</p>	<p>Objective 10.1 Meaningful Input Opportunities - Provide meaningful input opportunities for interested and affected stakeholders, including people who have traditionally been underrepresented, resource agencies, business, institutional and community stakeholders, and local, regional and state jurisdictions</p>		<p>Objective 6.1 Support strategic and collaborative program oversight.</p> <p>Objective 6.4 Develop an equitable and sustainable funding plan.</p> <p>Objective 5.1 Apply appropriate measures</p>

RTP Goal	RTP Objective	Potential RTP Action	RTO supporting strategy
<p>meaningful opportunities for input in transportation decisions and experiences an integrated, comprehensive system of transportation facilities and services that bridge governance, institutional and fiscal barriers.Goal</p>	<p>that own and operate the region's transportation system in plan development and review.</p> <p>Objective 10.2 Coordination and Cooperation - Ensure representation in regional transportation decision-making is equitable from among all affected jurisdictions and stakeholders and improve coordination and cooperation among the public and private owners and operators the region's transportation system so the system can function in a coordinated manner and better provide for state and regional transportation needs.</p>		<p>to programs and report findings to support investment in cost-effective strategies.</p> <p>Strategy 5.1.1. Measure program performance and communicate results</p> <p>Objective 6.1 Support strategic and collaborative program oversight.</p> <p>Objective 1.3 Support collaboration and encourage coordination of RTO partner marketing activities.</p> <p>Strategy 1.3.1. Support collaboration and distribute best-practices information.</p> <p>Objective 2.2 Support coordination of RTO employer outreach marketing activities.</p> <p>Strategy 2.2.1 Support marketing partners coordination and collaboration.</p>

F. Strategic plan development process

Goals

- Develop a 5-year strategic plan that supports implementation of the updated RTP , Congestion Management Process, and Metropolitan Transportation Improvement Program (MTIP).
- Develop a plan that is measurable, supported by partner agency executives, and that guides program decision making and work program development.
- Engage TPAC members, RTO Subcommittee members, RTO partner organizations and stakeholders, and interested community members in the strategic planning process.
- Use the strategic planning process to develop an RTO decision-making and advisory committee structure that supports RTO program implementation.

Phase 1: Strategic Analysis (October and November 2007) – A kick-off workshops for RTO subcommittee members and program stakeholders was held Oct. 23, 2007. Topics included: review and update program goal, review status of current programs (outcomes and resource allocation), environment scan to identify opportunities and threats, information about alternative program models (Washington CTR, Bend Commute Options, Recycle at Work), identify most promising strategies for program implementation, and form working groups to refine strategies and recommend action plans and budgets.

The following technical working groups were formed:

- Collaboration – Discussion topics: regional marketing campaigns (Drive Less/Save More), program branding, traveler information, events outreach, schools outreach, region-wide survey, budgets/funding model, and subcommittee bylaws.
- Commuters – Discussion topics: employer outreach services, collaboration/coordination and branding; Carefree Commuter Challenge, commute modes (transit, carpool, vanpool, cycling, walking, telecommute); BETC promotion; and budgets/funding models.
- Individualized marketing – Discussion topics: home-based residential marketing efforts, recommend locations and implementation model for future projects.
- Centers – Discussion topics: TMAs, funding models for public private partnerships, relationship to regional TOD and Centers programs, locations for new TMAs, parking management and integration with other RTO programs/strategies.

Phase 2: Develop program priorities (November 2007 to January 2008) – Technical working groups met in November and December to identify potential strategies and projects. A prioritization workshop for RTO subcommittee members and program stakeholders was held on Dec. 11, 2007. Workshop topics included: review of working group findings and

recommendations, finalize program goals, and identify program priorities for resource allocation.

Criteria for selecting strategic plan strategies and projects:

- Potential to reduce vehicle miles of travel
- Potential to increase use of travel options
- Ease of implementation
- Timeline
- Cost effectiveness of reaching people (per person costs – large vs. small)
- How sustainable for long-term
- Regional program vs. small/local
- Serves an identified problem area
- Innovation
- Ability to measure
- Builds capacity where needed
- Complementary/supports 2040 policy

Phase 3: Plan review and adoption (January to April 2008) – The RTO subcommittee reviewed and provided comments on the draft plan at their Jan. 9, 2008 meeting. The subcommittee adopted the plan February 13, 2008 and forwarded it to TPAC, JPACT and the Metro Council for consideration and approval.

G. Environment scan

The RTO subcommittee identified the following trends and issues that should be taken into consideration as part of the program strategic planning process.

- **Supportive/receptive public attitudes**

Rising gas prices and the resulting hit on consumer pocketbooks, combined with concerns about traffic congestion, global warming and our nation's dependency on foreign oil have shifted public attitudes about travel options. Public awareness research conducted in the Portland metropolitan area for the Drive Less/Save More campaign in 2007 indicates the public recognizes the importance of reducing single-person auto trips and is willing to take personal action to change travel behavior. RTO programs provide and market environment-friendly travel choices can save consumers time and money. The shift in public attitudes creates opportunities for the RTO program to expand the reach of marketing messages to new and more receptive audiences, and to deepen the commitment of those who already use travel options for some trips.

- **Focus on climate change**

Policy makers and businesses are focused on climate change in response to constituent and consumer concerns about global climate change. RTO program strategies have a demonstrated ability to change personal travel behavior and reduce vehicle miles of travel and auto emissions. The program has a uniquely positioned to support individuals and businesses that want to reduce their carbon footprint with travel options services and programs. 2008 to 2013 is also a key time to influence national, state, regional and local climate change initiatives to ensure that travel options strategies are considered and included, and to develop new revenue sources to expand implementation of RTO strategies.

- **Focus on physical activity**

Public health organizations and health care providers recognize that increased physical activity is a key strategy to reducing obesity. Rising rates of obesity have shortened life expectancy and increased health care costs. RTO strategies that support increased use of transit, walking and cycling result in increased levels of physical activity. The RTO program should seek opportunities to partner with public health organizations and health care providers to support and implement RTO strategies.

- **Diverse new residents of the region**

New residents of the region are seeking alternatives to driving alone based on familiarity with transportation systems in other parts of the United States and the world and/or the need to reduce travel costs. Some new residents cite the region's transit system and bicycle infrastructure as reasons for relocating to the Portland area (cite city of Portland bike map request data here).

- **Low-cost solutions for employers**

The RTO Employer Outreach Programs offers low-cost solutions that address employer transportation issues. Employer Outreach Programs benefit employers by reducing parking need and cost, reducing employee absenteeism and late arrivals, and improving employee productivity and morale. Transit and rideshare programs enable employers to recruit employees from a wider geographic area. And implementation of some travel options programs results in tax benefits for employers. Outreach to employers will emphasize the potential cost-savings and other benefits of establishing travel options incentives and programs for employees.

- **New web-based information and networking tools**

New web-based information-sharing tools create the opportunity for the RTO program to develop cost-effective strategies to achieve internal and external marketing and communication goals. In addition, the emergence of social networking web sites and on-line advertising creates the opportunity for the RTO program to reach new audiences with travel options marketing messages. This is critical as the market share for traditional print and electronic media is expected to continue to decrease in 2008 to 2013.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 08-3919, FOR THE PURPOSE OF ADOPTING THE REGIONAL TRAVEL OPTIONS 2008-2013 STRATEGIC PLAN

Date: February 25, 2008

Prepared by: Pamela Peck

RECOMMENDATION

Staff recommends adoption of the goals, strategies and priorities described in the Regional Travel Options (RTO) 2008-2013 Strategic Plan (Exhibit A). The recommendation includes a base budget, described in Appendix B of the strategic plan, to support program activities and describes the roles of Metro and program partners in carrying out those activities. The plan emphasizes regional collaboration and coordination to leverage resources, avoid duplication and maximize program impacts. The base budget, described in Appendix B of the strategic plan, identifies program revenue sources and will serve as the basis for future revenue development activities, including Metropolitan Transportation Improvement Program (MTIP) funding applications.

The RTO Subcommittee of Transportation Policy Alternatives Committee (TPAC) developed the RTO 2008-2013 Strategic Plan in consultation with program partners and stakeholders, and recommended adoption of the plan at their February 13, 2008 meeting.

BACKGROUND

Program mission

“The regional partners will work collaboratively to provide and actively market a range of travel options for all residents and employees of the region.”

Program purpose

The RTO Program supports implementation of the Regional Transportation Plan (RTP) and carries out regional policy to increase use of travel options, reduce pollution, and improve mobility. Regional travel options include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, cycling, walking and telecommuting.

The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours. RTO strategies offer low-cost solutions that: address employer and commuter transportation needs, save consumers money, reduce vehicle emissions that contribute to air pollution and global warming, and encourage active travel modes that enhance public health and increase physical activity.

Program partner roles

The RTO Subcommittee of TPAC provides program oversight and recommends strategic plan updates, annual work plans and budgets, and RTO policies for approval by TPAC, JPACT and the Metro Council. The subcommittee also oversees the RTO Grants Program and allocates funds to local projects and programs through a competitive process that is administered by Metro.

In 2005, Metro assumed management of the RTO program from TriMet. In this capacity, Metro administers the regional program; measures results and supports partner collaboration. Metro manages the regional Drive Less/Save More marketing campaign in partnership with the Oregon Department of Transportation (ODOT). Metro also administers the regional rideshare program, which includes the Metro VanPool incentive program, and customer service support for CarpoolMatchNW.org, the region's online ride-matching service. The 2008-2013 Strategic Plan calls for Metro to continue to manage the RTO program and to deliver the services described above. In addition, the plan calls for Metro to enhance coordination of employer and commuter programs and services.

Public and private partners carry out RTO strategies through grant agreements. TriMet, Wilsonville SMART and six local Transportation Management Associations (TMAs) receive annual funding sub-allocations to implement RTO strategies. Transportation Management Associations (TMAs) are public-private partnerships that advance area-specific strategies to reduce drive alone commute trips. The RTO program collaborates with the city of Portland's SmartTrips to reach downtown Portland employees and Portland neighborhoods. In addition, the program works with the city of Vancouver and C-TRAN to reach commuters who travel from Clark County, Washington to the Portland, Oregon area.

Program revenue sources

The 2008-2013 Strategic Plan base budget, described in Appendix B, identifies three primary program revenue sources, including federal CMAQ funds allocated through the regional MTIP process, ODOT grants to support specific projects and matching funds contributed by Metro and local agencies. The program also generates Oregon Business Energy Tax Credit (BETC) funds and revenue from sales of the Bike There! map. In addition, an agreement with C-TRAN is under development to support vanpool incentives for commuters who travel from Clark County to the Portland area.

MTIP revenues are in place for the first four years of the strategic plan, FY 09 through FY 12, and the plan will be the basis for applying for funds for FY13 and FY 14. The strategic plan calls for the program to continue to seek additional grants, sponsorships and cost-sharing partnerships to leverage federal funds and support program priorities.

Strategic plan priorities 2008 to 2013

- Supports new capital investments in transit, trails and other infrastructure by marketing new options to potential riders and users.
- Reach additional employers and commuters through employer outreach programs.
- Enhance traveler information services.
- Market travel options to new residents and people who relocate in the region.
- Support development of parking management strategies in local downtowns and centers.
- Support public-private partnerships to leverage investments and increase use of travel options in local downtowns and centers.
- Apply individualized marketing strategies in select locations to increase travel options use and decrease single-person car trips.
- Continue implementation of the Drive Less/Save More campaign to increase awareness and use of travel options.

Program impacts

RTO strategies are expected to reduce approximately 86,600,000 vehicle miles of travel (VMT) per year from 2008 to 2013. By 2013, this represents over a 100% increase over 2006 VMT reductions produced by the program. The expected increase in VMT reductions is based upon past program performance, expected revenues, improving measurement and cost-effective investments. On a daily basis, expected VMT reductions are the equivalent of removing 19,000 autos from the road or 59 miles of autos placed

bumper-to-bumper. The result is an estimated annual reduction in fuel consumption of 4,220,000 gallons, saving businesses and consumers \$12,660,000, and reducing 42,600 tons of greenhouse gas emissions.

ANALYSIS/INFORMATION

1. **Known Opposition** None.

2. **Legal Antecedents**

1991 Federal Clean Air Act Amendments. The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474 in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

TDM Subcommittee. The TPAC TDM Subcommittee was established by Metro Resolution 92 – 1610. Oversight for the development and evaluation of TDM strategies, and formation of final recommendations to TRANSPORTATION POLICY ALTERNATIVES COMMITTEE (TPAC), JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT) and Metro Council concerning TDM planning, programming and implementation activities were assigned to the Subcommittee.

TDM Relationship to DEQ’s Ozone Maintenance Plan (Governor’s Task Force on Motor Vehicle Emissions Reduction (HB 2214). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

Transportation Management Association (TMA) Policy. The policy basis and funding strategy for TMAs was adopted through Metro Resolution No. 98 – 2676. Metro Resolution No. 99- 2864 allocated regional funding to existing and new TMAs. Metro Resolution No. 02 – 3183 revised TMA policy by calling for balanced support of existing TMAs with the start-up of new TMAs.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2968B) provides TDM policies and objectives that direct the region’s planning and investment in the regional TDM program.

Regional Travel Options 5-Year Strategic Plan. The strategic plan established a new vision for the region’s transportation demand management programs and proposed a reorganized and renamed Regional Travel Options program that emphasized partner collaboration to implement an integrated program with measurable results. JPACT and the Metro Council adopted the plan through Resolution No. 04-3400, which also renamed the TDM Subcommittee the RTO Subcommittee, and was adopted in January 2004.

2035 Regional Transportation Plan. The federal component of the plan, pending air-quality analysis, was approved by Metro Council Resolution No. 07-3831B on Dec. 13, 2007. The RTP establishes system management and trip reduction goals and objectives that are supported by the RTO program strategies.

3. **Anticipated Effects**

Allocation of funds to local projects and programs: The strategic plan base budget, described in Appendix B of the strategic plan, identifies annual funding sub-allocations for TriMet and Wilsonville

SMART. TriMet will apply directly to the Federal Transit Administration for funds and the RTO program's MTIP allocation will be amended to sub-allocate those funds to TriMet.

The RTO Grants Program will allocate grant funds to support neighborhood-based individualized marketing projects and other local projects through a competitive grant process administered by Metro. A list of preferred grant projects that advance program priorities is included in the strategic plan (Exhibit A).

Discussion of TMA funding policy: The strategic plan calls for the RTO program to update TMA funding policies to better address RTO program goals and enhance local capacity to carry out RTO strategies. The TMA funding discussion will likely impact annual TMA funding sub-allocations and may reduce or increase the amount of funds individual TMA's receive from the RTO program. The Strategic Plan base budget, described in Appendix B of the strategic plan, assumes ongoing support for TMAs at current funding levels. RTO Grant program funds would be used to support an increase in the annual TMA allocation. The RTO subcommittee of TPAC will make recommendations to TPAC, JPACT and the Metro Council on this issue in the coming months.

4. Budget Impacts

The Metro Planning Department budget for FY 08 includes MTIP and grant funds to support the current level of RTO activities carried out directly by Metro. The strategic plan base budget calls for additional Metro support for program administration and employer outreach coordination and recommends allocating additional MTIP funds to Metro for this purpose. A Metro budget amendment to support strategic plan implementation will be forwarded to the Metro Council for consideration in the coming weeks. The amendment will propose .4 FTE in additional administrative support, such as the development of grant agreements and payment of vendors, and .5 FTE to support employer and commuter program activities, for a total of .9 FTE. The amendment will have a budget impact of \$30,600 in FY 08. Federal funds will support 89.73% of the cost and BETC funds will be proposed to provide the 10.27% local match. This will be described in detail in the budget amendment.

RECOMMENDED ACTION

1. Approve the mission, goals, strategies and actions in Exhibit A, Regional Travel Options 2008-2013 Strategic Plan.
2. Approve the base budget and funding sub-allocations to program partners described in Appendix B of the Regional Travel Options 2008-2013 Strategic Plan, actual funding levels will be established through the MTIP decision-making process.

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



DATE: March 4, 2008
TO: JPACT and Interested Parties
FROM: Kim Ellis, Principal Transportation Planner
SUBJECT: 2035 Regional Transportation Plan –Draft Schedule for State Component

Action Requested

- Discuss and provide input on preliminary draft schedule (see Attachment 1).
 - Is the preliminary draft work program a reasonable approach?
 - Do members support staff moving forward with the proposed expanded timeline for the state component of the 2035 RTP update?
 - Do members support holding joint JPACT/MPAC meetings to provide direction at key decision points during the process?

With MPAC and JPACT input, staff will continue working with TPAC and MTAC to finalize the work program and schedule in March.

- Discuss and provide input on draft RTP Funding Strategy work program (see Attachment 2).

Background

On December 13, 2007, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council adopted the federal component of the 2035 Regional Transportation Plan (RTP) to meet the Safe, Accountable, Flexible, and Efficient Transportation Equity Act—A Legacy for Users (SAFETEA-LU) and other federal planning requirements. The U.S. Department of Transportation approved the RTP conformity determination and related documentation on February 29, 2008, formally concluding the federal component of the 2035 RTP update.

The 2035 RTP provides an updated blueprint to guide transportation planning and investments in the Portland metropolitan region – including development of the state component of the 2035 RTP. Completion of the state component will trigger a number of implementation activities at the local, regional and state level.

Consultation Activities on State Component Work Program

Since January, staff consulted several local and state agency staff, the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC) to confirm issues to be addressed during the state component and gather input on a preliminary draft schedule and work program. Input provided to date includes:

- 1 year is insufficient for completion of the state component
- allow enough time for meaningful discussion and analysis of the updated RTP policy and development of the state system of investments
- continue to integrate/coordinate with New Look/Making the Greatest Place tracks
- provide opportunities for more collaboration and partnerships between agencies

In addition, the Metro Committee for Citizen Involvement (MCCI) provided input on the draft public participation plan and outreach strategies.

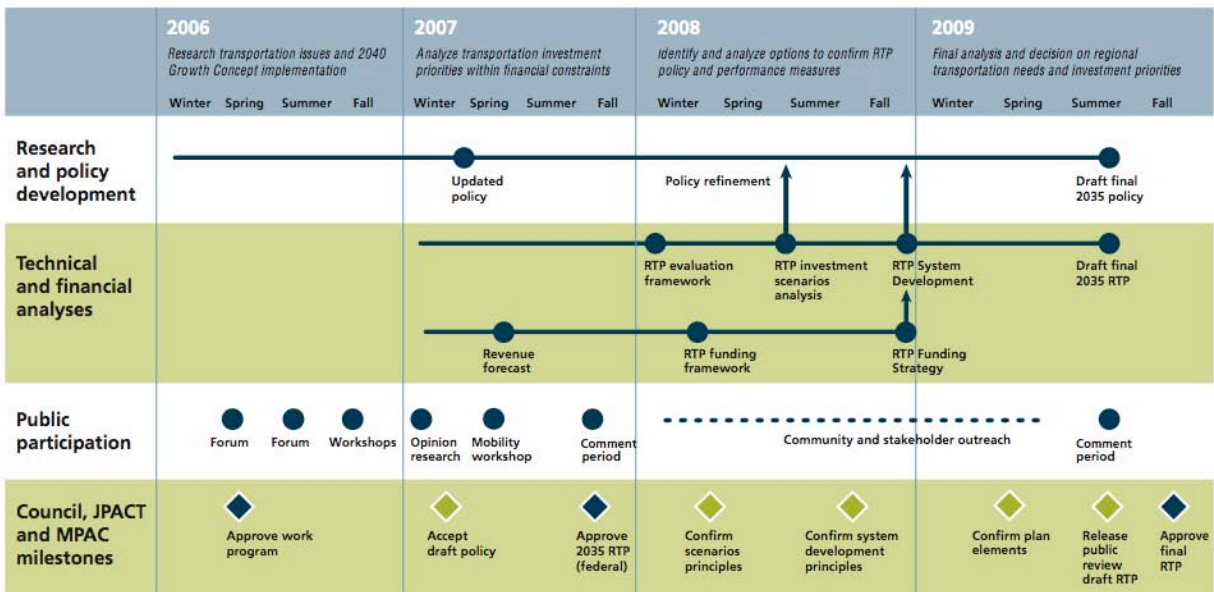
Proposed State Component of RTP Update Schedule and Work Program Elements

The proposed schedule and work program extends the state component timeline from one year to two years in response to input received to date. The state component of the 2035 RTP update will address unresolved issues identified during the federal component of the 2035 RTP, including:

- Development of outcomes-based evaluation framework and recommended set of performance measures (region-wide, mobility corridors and community-building) (*January '08 – June '09*)
- Regional bicycle policy refinement (*March – May '08*)
- Regional system definition, funding responsibility and development of a long-term transportation finance strategy to fund needed investments (*March '08 – April '09*)
- Scenarios development to evaluate RTP policy and draft performance measures (*June '08 – October '08*)
- System development and project/program prioritization linked to RTP policy, evaluation framework and long-term funding strategy (*Nov. '08 – April '09*)
- Compliance with recent amendments to the Oregon Transportation Planning Rule and Oregon Transportation Plan (*Spring/Summer '09*)

Preliminary Draft Schedule and Work Program Elements for RTP Update

**2/20/08 Preliminary Working Draft
Regional Transportation Plan Update Timeline**



/attachments

- **Attachment 1** – Proposed Key Milestones for State Component of 2035 RTP (*preliminary working draft dated 2/26/08*)
- **Attachment 2** – Proposed 2035 RTP Funding Strategy Work Program (*preliminary working draft dated 3/4/08*)

Proposed 2008-09 Outreach Milestones

	WINTER			SPRING			SUMMER			FALL			WINTER			SPRING			SUMMER			FALL		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Website & E-Newsletter			◆							◆							◆				◆	◆	◆	◆
CETAS consultation																							◆	
County Coordination Committee briefings		◆			◆					◆				◆				◆				◆		
TPAC/MTAC Workshops			◆	◆					◆		◆		◆	◆						◆				
Joint MPAC & JPACT meetings					◆					◆								◆						
Council, JPACT & MPAC briefings		◆	◆		◆				◆		◆				◆		◆					◆		◆
Regional Freight Task Force					◆					◆						◆						◆		
Performance Measures Work Group		◆	◆	◆	◆	◆			◆	◆	◆	◆	◆			◆	◆	◆						
Transportation Planning Rule Work Group																		◆	◆		◆			
Regional Bicycle Policy Work Group			◆	◆	◆				◆	◆														
Transportation Funding Policy Work Group																								
Public hearings																						◆	◆	
OTC/ LCDC Briefings				◆							◆												◆	
Community/Stakeholder Outreach					◆	◆	◆	◆		◆			◆	◆			◆				◆	◆	◆	◆

Proposed 2008-09 Planning Activities Coordination Milestones

	WINTER			SPRING			SUMMER			FALL			WINTER			SPRING			SUMMER			FALL		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
New Look - Investment					◆													◆						◆
New Look – Urban & Rural Reserves						◆					◆							◆						◆
New Look – Performance-Based Growth Management						◆					◆							◆						◆
Regional High Capacity Transit Study	◆						◆					◆												
Regional Travel Options Strategic Plan			◆																					
Regional Freight and Goods Movement Plan							◆																	
Regional Transportation System Management and Operations Plan							◆																	
Portland Street Car System Plan																								
LPA – Milwaukie LRT					◆																			
LPA – Columbia River Crossing			◆		◆																			
LPA – I-5/99W Connector																								
LPA – Sunrise Project						◆						◆					◆							
LPA – Lake Oswego-Portland Streetcar																								
Transportation Priorities Process/MTIP Update		◆				◆																		
Highway 212/Damascus Parkway Planning																								
ODOT Tolling Analysis Study						◆					◆													
ODOT Freight Plan Update																								
Clark County HCT Study																								
Clark County Corridors Visioning Study																								
I-205/Airport Way EIS																								

To be completed

2035 RTP Funding Strategy Work Program

Preliminary Working Draft – 3/4/08

OVERVIEW

Transportation finance must undergo significant change over the life of the Regional Transportation Plan (RTP). The RTP update process has addressed financial realities from the outset, recognizing that federal, state and local funding for infrastructure investments is not keeping pace with needs, particularly for operations, maintenance and preservation (OM&P) of existing public assets but also needed expansion of the system. Fragmented ownership and inadequate funding mechanisms pose additional challenges to providing an efficient and well-coordinated transportation system. In addition to raising issues around funding of transportation capital and OM&P needs, the federal component of the 2035 RTP also identified the need to define the regional transportation system and establish funding responsibility for facilities on the state, regional, and local transportation system.

This work program will address the growing disconnect between funding shortfalls and governance of the region's transportation system to define a long-term strategy to funded needed investments in order to successfully implement the 2040 Growth Concept and sustain the region's economic prosperity and livability.

EXISTING SOURCES OF REVENUE ARE NOT ADEQUATE TO MAINTAIN AND EXPAND THE EXISTING TRANSPORTATION SYSTEM

ECONorthwest investigated current resources and transportation funding trends, determined the reasonably anticipated local, regional, state and federal financial resources that would result from current funding trends and estimated the amount of funding that is expected to be available for capital projects for the years 2007-2035. Financially constrained revenues for capital investments were forecasted to be roughly \$9 billion.

The federal component of the 2035 RTP used two significant assumptions about expected revenue in addition to continuing current trends. It assumed a one-cent per year increase in the state gas tax over the life of the plan to address rising operations, maintenance and preservation (OM&P) costs. It also assumed a biennial \$15 increase in the state vehicle registration fee every 8 years to fund modernization of the system. In addition, previous federal authorization levels served as a baseline for future expected revenues. With these revenue assumptions, a funding shortfall of \$11 billion was identified. The federal 2035 RTP identifies needs for the Metro region's transportation system in excess of \$20 billion. This only represents the capital needs of the regional transportation system.

In addition, the federal component of the 2035 RTP highlighted the need to better address issues of OM&P, as an annual one-cent gas tax increase for the life of the plan is not likely. Another issue of both OM&P and capital investment is the maintenance for the major bridges that serve regional travel, particularly bridges spanning the Willamette River. There is additional need to develop a long-term strategy for maintaining these regional bridges.

NEW INNOVATIVE AND COLLABORATIVE SOLUTIONS ARE NEEDED TO PAY FOR PUBLIC INVESTMENTS THAT WILL ENABLE COMMUNITIES TO DEVELOP AND THRIVE

The region's funding gap is so significant, the region needs to use every tool at our disposal to adequately address current and future transportation needs in support of the 2040 Growth Concept. New funding strategies, enhanced public and private collaborations and stronger public support for seeking new revenue sources must be developed to maintain existing transportation assets as well as to pay for major system investments.

These and other key transportation finance issues will be the focus of additional policy discussions during the state component of the RTP update. The state component of the RTP update will seek to develop innovative and stable funding sources to address current and future transportation needs. The fundamental state requirement for the RTP is to develop a plan that is adequate to serve planned land uses. In addition, the region (through the RTP) and local governments (in local transportation system plans) must have a financing strategy that supports implementation of the plans.

As part of the state component of the RTP update, Metro will facilitate discussions to confirm the definition of the regional transportation system and identify funding sources and jurisdictional responsibility for different elements of the regional system. This work will use the existing RTP System maps as a starting point for those discussions. The next step will be to explore various options for addressing the \$11 billion capital shortfall as well as the increasing cost of OM&P identified as part of the federal RTP. The goal is to establish a long-term strategy for providing the revenue needed to address the capital and OM&P shortfalls.

A more diverse portfolio of resources will be needed to reliably support transportation needs in the long-term. This includes alternatives to fuel taxes, as those sources of funding become less viable. Large, mega-projects that will make significant contributions to sustaining the region's economic competitiveness will be increasingly unable to compete for limited funding to maintain a state of good repair, operate the existing transportation system and expand other parts of the transportation system to respond to growth. Examples of the types of funding options that could be examined include: tolling and value pricing, gas tax increase, regional ballot measure, street utility fees for OM&P, creation of a regional transportation authority, and system development charges for all expansion of arterial and collectors to meet population growth projections. New technologies and other innovative finance options will continue to evolve which will expand opportunities to directly assess users of the transportation system, while better managing operation of the transportation system.

OBJECTIVES

The major objectives of the work program are:

- ✓ Strengthen the relationship between transportation policies and projects in the RTP and transportation funding decisions.
- ✓ Confirm the regional transportation system definition.
- ✓ Reach agreement on funding responsibility for different elements of the regional system.
- ✓ Establish an array of transportation finance options and evaluate options for feasibility and ability to address the finance shortfalls.
- ✓ Define what funding sources should be targeted to meet the various transportation needs in the region.
- ✓ Define long-term action plan for investment priorities and list of “reasonably likely” investments.

PROCESS AND SCHEDULE

This element of the RTP update will create a framework for addressing the funding issues identified during the federal RTP update and develop a comprehensive, long-term funding strategy for operations, maintenance and preservation of existing public assets and the transportation projects and programs recommended in the final 2035 RTP. This work will be coordinated with the Regional Infrastructure Analysis project and development of a short-term action plan to guide pursuing funding through the federal reauthorization, the 2009 legislature and a potential regional measure. This work program would provide input to the state RTP by addressing the question “what is reasonably likely to be funded”

consistent with 2006 amendments to the State Transportation Planning Rule. The recommended strategy will also effectively link land use and transportation investment decisions to maximize and protect the public's investment in the transportation system.

TASK 1: DEFINE RTP FUNDING FRAMEWORK (MARCH – SEPTEMBER 2008)

- Confirm the regional system definition using the existing RTP Systems maps and February 1 JPACT retreat direction as a starting point.
- Define responsibility for each part of the regional system: state, regional, and local.
- Define potential range of funding sources, discuss choices and the tradeoffs associated with each and link to responsibility for different parts of the system:
 - Traditional user fees (gas tax, VMT fees, registration fees) and our share of this regional resource or state resource (i.e. \$0.05 of regional gas tax or 50% of \$0.10 state gas tax)
 - Value pricing
 - Street utility fees
 - Growth-related fees (SDC/TIF)
 - Federal sources
 - Potential for Regional Transportation Authority

TASK 2: DEFINE RTP FUNDING STRATEGY (OCTOBER 2008 – APRIL 2009)

- Evaluate different funding source choices and tradeoffs to define how much of each source should go to different elements of the regional system:
 - Maintenance (street utility versus gas tax)
 - Interstate and State Highways (value pricing in coordination with recommendations from ODOT's tolling analysis study)
 - New capacity only
 - Adding new lanes on existing facilities
 - Existing facilities
 - ODOT Regional and District Highways
 - Street network (traditional user fees versus growth-related fees)
 - Regional Bridges (Regional Transportation Authority versus other options)
 - Regional Transit (payroll taxes versus regional bond measure)
 - Regional Bike/Ped/Trails
 - Regional Programs (MPO Planning/RTO/TOD/TSMO which lack dedicated sources)
- Define actions necessary to implement identified revenue sources and document steps taken to date to address the necessary actions.
- Develop long-term action plan for investment priorities, including a project list.

PROPOSED PARTICIPANTS

A subcommittee of JPACT members was recently formed in response to recent JPACT finance discussions on the potential for the creation of a Regional Transportation Authority (RTA). In addition, members of the Regional Freight and Goods Movement Task Force have expressed interest in remaining involved in the state component of the RTP update.

Therefore, a RTP Funding Strategy work group, comprised of the JPACT subcommittee and 3-4 Regional Freight Task Force Members, is recommended to address the work program elements identified in this document. This small work group will advance recommendations for discussion and approval by JPACT, MPAC and Metro Council.

Name	Organization
Lynn Peterson	Clackamas County Commissioner, Work Group Chair
Robert Liberty	Metro Councilor
Roy Rogers	Washington County Commissioner
Ted Wheeler	Multnomah County Commissioner
Jason Tell	ODOT Region 1 Manager
Fred Hansen	Trimet General Manager
Jim Bernard	Mayor of Milwaukie
Rob Drake	Mayor of Beaverton
Paul Thalhofer	Mayor of Troutdale
Shane Bemis	Mayor of Gresham

Staff

Elissa Gertler	Clackamas County
Andy Cotugno	Metro
Andy Shaw	Metro

M E M O R A N D U M

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TEL 503 797 1700 | FAX 503 797 1794



METRO

Date: March 5, 2008
To: JPACT
From: Malu Wilkinson, Principal Planner and Miranda Bateschell, Associate Planner

RE: Community Investment Toolkit and Impact-based SDCs

JPACT is entering into serious discussions about how to fund our regional transportation system, of which there is a local and a regional component. The work described in this memo focuses on local investment tools that could fund a portion of the local component of the transportation system as well as increasing development in centers, corridors, and employment areas.

One element of Metro's Making the Greatest Place initiative is to focus efforts to stimulate investment in existing communities. A key component of investing in our communities is developing strategies, partnerships, and tools to make the most efficient use of land within existing communities. Many examples of successful public investment stimulating private development exist within the region and in our neighboring cities for example Gresham's civic station, Lake Oswego's downtown, and Portland's South Waterfront.

Metro's analysis of growth scenarios concludes that more investment could double the amount of housing developed in centers, while reduced investment in the region's centers pushes more jobs and housing out to our neighboring communities, increasing congestion and pressure on the transportation system. Therefore, local decisions to build on current successes and expand the use of public resources to invest in our communities will shape the future of the Metro region. Thus, Metro is developing a Community Investment Toolkit to help communities in the region identify proven strategies and tools that can be used to stimulate investment in the region's centers, corridors, employment, and industrial areas to achieve the 2040 regional vision.

Local Tools

We are focusing on tools that are controlled at the local level that if used more or used differently could spur additional investment in our communities. To develop the toolkit series, we have been exploring several of these tools in depth with MTAC, MPAC, and other stakeholder groups: bringing in speakers, hosting workshops, and meeting with local experts, developers and staff.

Metro has produced the first volume of the toolkit, focusing on financial incentives, and has three more under production and scheduled for completion in 2008. The additional three volumes cover: urban design and local zoning and building codes; employment and industrial areas; and emerging communities. Implementing a combination of tools from the different volumes is integral to the most efficient use of land within the UGB and supporting vibrant, mixed-use, multi-modal communities.

The toolkit provides important information, considerations, local success stories and implementation tips for various tools that spur this investment. Highlighting the region's success stories, the toolkit demonstrates how these strategies are achieving results and serves as a guide. With technical assistance from Metro, we hope that this toolkit will help communities build vibrant downtowns and main streets and create places for businesses to flourish.

Volume 1: Financial Incentives

The first volume of the toolkit highlights tools that offer tax incentives for developing additional housing in centers and along corridors with connections to and facilities for public transit; establish financing districts that pay for infrastructure, redevelopment and maintenance programs; and encourage SDC fees that promote development projects and patterns that have lower impacts and infrastructure system costs.

This volume includes chapters on: Oregon's Vertical Housing Program, the Transit-Oriented Tax Exemption Program, Brownfields Redevelopment Funds, Urban Renewal and Tax Increment Financing, Improvement Districts, and Impact-based System Development Charges.

Impact-based System Development Charges

The last chapter of the financial incentives toolkit, focused on impact-based SDCs, references a report, "Promoting Vibrant Communities with System Development Charges." This report highlights local, national and international examples of successful and creative approaches to calculating SDCs that support sustainable development patterns and reflect true development and impact costs. SDC methodologies with varying fee structures are an integral part of a collection of local solutions that will help implement 2040. SDCs are a local tool that if used differently, could more equitably apply SDC fees for different development types based on their true impacts and costs while assisting the region in achieving the needed infrastructure to support the 2040 vision. We are beginning to work with some jurisdictions to evaluate how they can implement a new approach to SDCs, and we hope to see wide use of innovative SDCs as part of the local component of funding our region's infrastructure.

COMMUNITY
INVESTMENT
TOOLKIT
VOLUME 1

Financial

COMMUNITY INVESTMENT GUIDE

Incentives



METRO



Promoting vibrant communities with


System Development Charges

Report by Galardi Consulting in association with Dr. Arthur
C. Nelson, Paramatrix, and Beery, Elsner, and Hammond, LLP

July 2007



METRO

Oregon Transportation Commission  <h1>POLICY</h1> (Draft Date: 11/19/07)	NUMBER TRANSPORTATION COMMISSION-99	SUPERSEDES TRANSPORTATION COMMISSION-99
	EFFECTIVE DATE 99/99/99	PAGE NUMBER 01 OF 99
	REFERENCE OREGON TRANSPORTATION COMMISSION MINUTES – Month day, 2007 POLICY ON FORMATION AND OPERATION OF AREA COMMISSIONS ON TRANSPORTATION	
SUBJECT Project Earmark Requests	STIP PROJECT ELIGIBILITY CRITERIA AND PRIORITIZATION FACTORS	

PURPOSE

The Oregon Transportation Commission (OTC) establishes the following policy to increase the likelihood that congressional earmarks in the surface transportation reauthorization legislation will contribute to advancing or completing projects that have been identified as priorities by the OTC’s regional or statewide transportation advisory committees.

POLICY

The Oregon Transportation Commission intends to advance an official OTC Earmark Requests List, containing a limited number of earmark requests in the federal surface transportation reauthorization legislation for projects that are strategic investments in Oregon’s transportation system and have broad support. ODOT will provide or help provide matching funds and funds to make up any shortfalls for projects on the OTC list.

In developing the official OTC Earmark Requests List, the Commission will consider recommendations from Area Commissions on Transportation (ACTs) and other advisory bodies, statewide priorities, and available budget for providing required match and fully funding the project. The Commission may give preference to earmark requests that will complete the funding necessary to fully construct a project over requests that will fund only earlier phases, such as project development activities or right-of-way acquisition, or only beginning construction of a new project.

ODOT region staff and local government agencies are expected to work together through the Area Commission on Transportation (ACT) or similar body to identify and recommend appropriate projects that are high priorities for the area, have broad support, and meet the criteria laid out in this policy. The ACTs are to prepare the ACT Earmark Recommendation Lists and supporting documentation that demonstrates how each project meets the Earmark Project Requirements. The OTC

will review and consider projects on the ACT Earmark Recommendation Lists to prepare the official OTC Earmark Requests List. The OTC may also consider recommendations from its statewide advisory committees such as the Public Transportation Advisory Committee (PTAC) or the Oregon Freight Advisory Committee (OFAC). Projects that have the support of multiple parties including local governments, area and statewide transportation advisory committees, and the ODOT region will be preferred over ones that have less support.

Earmark Project Requirements

The Commission establishes the following criteria for earmark requests:

- *Strategic Investment:* The project is a strategic investment to improve Oregon's transportation system, is included in an existing transportation plan document, and has been identified as a regional or state priority.
- *Meets STIP Criteria:* Projects recommended for earmark requests must meet the approved Statewide Transportation Improvement Program (STIP) criteria as set forth in the *STIP Project Eligibility Criteria and Prioritization Factors*.
- *Support:* The project has strong support, including support from local government agencies, area and/or statewide advisory bodies, the public, and the business community.
- *Readiness:* The project has been developed enough to identify potential environmental concerns and demonstrate that it has no known fatal flaws. Earmark funding received will be used to complete the project or a project phase, including accomplishing a project development milestone, and the work will begin during the timeframe of the transportation authorization legislation.
- *Funding:* Earmarks should provide the "last dollar" for a project or project phase to fill a shortfall after other funding has been allocated. The project may be structured in phases so that the earmark funds received will complete a segment of the project.

The OTC will only make requests for projects that meet these criteria. ACTs should only recommend projects that meet these criteria.

Local Agency Roles and Responsibilities

A local agency that secures earmark funding for a project not on the official OTC Earmark Requests List takes on the role of the project's sponsor. The local agency must provide matching funds and cover any funding shortfalls for the project. Except for funding already allocated in the STIP, ODOT does not intend to allocate additional funds to provide matching funds or cover any shortfalls for earmarks received by other agencies for projects not on the official OTC list. This policy will apply when the local agency's earmark is for a project on the state system in addition to when the earmark is for a project on the local agency's system. A local agency that secures an earmark for a local agency project also is responsible for developing and delivering

the project according to all applicable federal and state requirements, with oversight and technical assistance from ODOT.

ODOT often enters into agreements with local governments for local contribution to projects. Local agency earmarks will not be counted toward local contributions to projects unless the local agency receives prior approval from the ODOT region. ODOT may allow this in certain situations, including financial hardship for the local government and projects for which a local agency is making other transportation system improvements or other significant infrastructure improvements as part of a larger development effort.

DRAFT

Background on ODOT Draft Earmark Policy

SAFETEA-LU, the federal surface transportation authorization act that became law in 2005, included \$327 million in project-specific highway earmarks in Oregon. This is more than twice as much funding per year as provided by ODOT's modernization program in the 2008-2011 and 2010-2013 STIPs.

Congress will again take up a surface transportation authorization bill in 2009. Given the large amount of money allocated in the reauthorization legislation, the state and its partners have a strong interest in ensuring that earmarks are allocated to projects that have been identified as priorities and that address challenges facing Oregon's transportation system.

In order to help focus earmarks on identified priorities that can be delivered, ODOT is developing a policy on reauthorization legislation earmarks that lays out expectations, roles and responsibilities, and a process for prioritization of projects by ODOT advisory bodies, including ACTs. ODOT hopes that this policy and process will make clear the responsibilities that earmark recipients take on and improve communication between ODOT and local agencies that are seeking money for state highway projects.

The draft policy has two primary components.

- *Policy:* The policy would reiterate previous policy statements by the Oregon Transportation Commission that local agencies that receive earmarks take on the role of project sponsor and are responsible for providing funding to fully fund the project; the OTC will not plan to budget additional state resources to cover matching funds or make up funding shortfalls for projects not officially requested by the OTC. The OTC will also set criteria for the earmarks it will request from the congressional delegation.
- *Process:* The draft policy lays out a process whereby ACTs and other advisory bodies will prioritize projects proposed by ODOT staff and local agencies. The OTC will forward an official earmark request list to the Oregon congressional delegation that will be largely drawn from the recommendations made by advisory bodies. This process is designed to help improve communication between ODOT and local agencies on earmark requests, provide input on regional and statewide priorities to the congressional delegation, and help the OTC request projects that are recognized priorities for funding.

Local agencies would be asked to submit their likely earmark requests to ACTs for consideration and prioritization. Nothing in the policy would prevent a local agency from requesting an earmark for a project that is not prioritized by an ACT.

Local agencies and ACT members are encouraged to provide feedback on the draft policy and guideline documents. Comments should be provided to ODOT staff by early April, in advance of the OTC's consideration of the draft policy. ACTs will be asked to prioritize projects in May through September, and final guidance that responds to feedback will be issued in May.

Materials following this page were distributed at the meeting.



Ted Wheeler, Multnomah County Chair

501 SE Hawthorne Blvd., Suite 600
Portland, Oregon 97214
Phone: 503.988.3308
Email: mult.chair@co.multnomah.or.us

March 11, 2008

Mr. Rex Burkholder
JPACT Chair
METRO
600 NE Grand Avenue
Portland, OR 97232-2736

Dear Chair Burkholder,

Multnomah County would like to propose new language in the 2010-13 MTIP Policy Report (Exhibit A to Resolution No. 08-3916). In the discussion under the evaluation categories, Multnomah County proposes the addition of a Regional Bridge Program as follows:

Funding will be allocated in a two-step process. The first step would be to consider an allocation (either a firm commitment or a recommendation that could be reconsidered at the end of the second step) to programs that are administered at the regional level. These include Metro Planning, High Capacity Transit system completion, the Regional Travel Options program, the Transit Oriented Development program, the Intelligent Transportation Systems program, and the Regional Bridge program.

Multnomah County has the responsibility (ORS 382.305) for operating and maintaining six Willamette River Bridges: Sellwood, Hawthorne, Morrison, Burnside, Broadway and Sauvie Island. The current projection for the County's Willamette River Bridge shows a 20-year need of approximately \$621 million which includes rehabilitating or replacing the Sellwood Bridge at an estimated cost of \$300 million. The Sauvie Island Bridge is currently being replaced and no capital projects are anticipated for this bridge in 20 years.

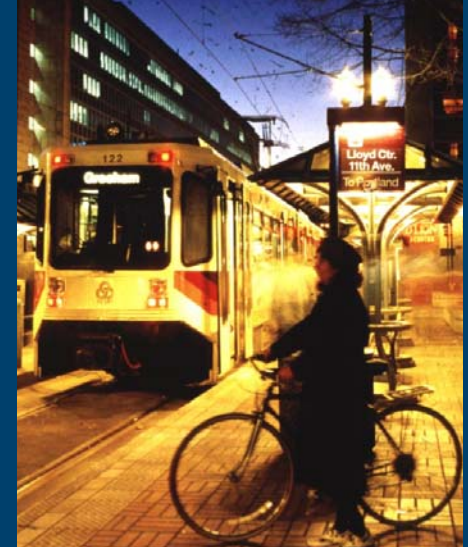
Exclusive of the Sellwood Bridge rehabilitation or replacement, general engineering, maintenance and operations on all the Willamette River Bridges, the capital maintenance and project needs for Multnomah County's Willamette River Bridges is expected to be \$321 million over the next 20 years (2007 \$s). Anticipated revenue over the next 20 years is expected to be \$131 million, leaving a \$190 million shortfall for capital maintenance. (A \$3 million per year MTIP allocation would reduce the shortfall by almost one third.)

Multnomah County recognizes the need to define the "Regional System" as discussed at the recent JPACT retreat. Multnomah County will continue to work with the region towards the establishment a Regional Transportation Authority and/or a Regional Bridge Authority.

Sincerely,

Ted Wheeler
Multnomah County Chair

www.metro-region.org



2008-2013 Strategic Plan

REGIONAL TRAVEL OPTIONS

March 13, 2008 | JPACT



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Strategic planning process

Goals

- Support RTP implementation
- Guide program decision-making
- Engage partners and stakeholders

Process

- Strategic analysis workshop
- Technical working groups
- Priorities workshop



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RTO 2008–2013 Strategic Plan

Mission

“The regional partners will work collaboratively to provide and actively market a range of travel options for all residents and employees of the region.”



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RTO 2008–2013 Strategic Plan Partners



Gresham Regional
Center TMA



Troutdale Area TMA



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RTO 2008–2013 Strategic Plan

Policy framework

Supports system management policies



“Each day the RTO program expects to remove 19,000 autos from the road or 59 miles of autos placed bumper-to-bumper.”



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RTO 2008–2013 Strategic Plan

Policy framework

Leverages capital investments



- WES (Westside Express) commuter rail
- MAX Green Line (I-205)
- Multiuse trails
- Bikeways



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RTO 2008–2013 Strategic Plan Policy framework

Supports development of centers



“RTO is one component in the effort to have half or more of all trips to centers made by transit, walking, cycling, carpooling and other travel options.”



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RTO 2008–2013 Strategic Plan Policy framework

Reduces pollution and
greenhouse gases



BY THE NUMBERS

42,600 tons

Greenhouse
gases
reduced yearly

123 tons

Smog producing
VOCs
reduced yearly

3.7 tons

Carcinogenic
particulate
matter reduced
yearly



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RTO 2008–2013 Strategic Plan Benefits

RTO strategies offer low-cost solutions that:

- Address workforce transportation needs
- Save consumers money
- Encourage active travel modes
- Increase awareness of the benefits of travel options



Saving the Planet Is
Just a Side Benefit.



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RTO 2008–2013 Strategic Plan

Goal 1: Increase awareness and use of travel options

Key strategy: Drive Less/Save More campaign



Drive less. Save more.
www.DriveLessSaveMore.com



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RTO 2008–2013 Strategic Plan

Goal 1: Increase awareness and use of travel options

Key strategy: Individualized marketing



- Identify people who want to change their travel habits
- Link trained staff and customized info to those who really want it



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RTO 2008–2013 Strategic Plan

Goal 2: Increase the use of travel options for commute trips

Key strategy: Employer and commuter services

“RTO employer and commuter programs are expected to reduce approximately 47,660,000 vehicle miles of travel per year.”

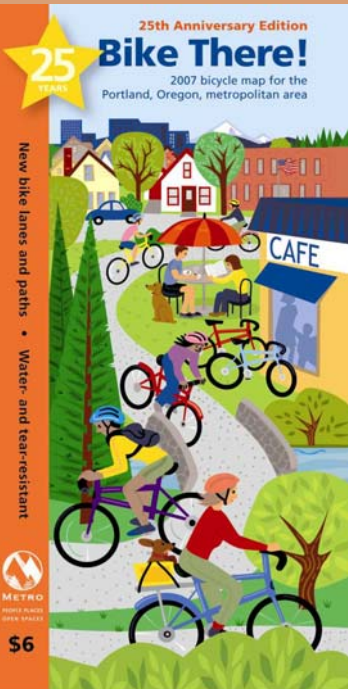


Transportation fair at Freightliner

RTO 2008–2013 Strategic Plan

Goal 3: Provide information and services to increase use of travel options for all trips

Key strategy: Traveler information



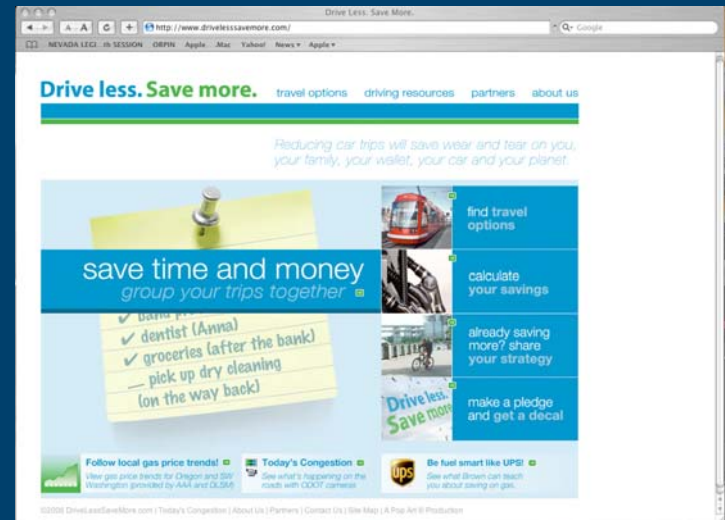
Web site helps residents drive less, save more

Want to learn how to beat high gas prices and avoid traffic jams? A free one-stop shop online tool is now available for Oregon and Southwest Washington that can show consumers how.

AAA Oregon's Web site, DriveLessSaveMore.com offers

know about the many practical ways to save on gas — it's just putting them to good use on a regular basis."

Area households spend more on transportation than on health care, education or food. By cutting just a single 10-mile trip, drivers whose cars get 22 mpg could save nearly \$500 a year.



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RTO 2008–2013 Strategic Plan

Goal 4: Promote and provide services that support increased use of travel options in local downtowns and centers

Key strategy: Public-private partnerships

“TMAs work to strengthen partnerships with businesses to reduce traffic congestion and pollution by improving local commuting options”



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RTO 2008–2013 Strategic Plan

Goal 5: Report progress to aid decision making and encourage innovation

Key strategies

- Measure performance and communicate results
- Conduct a regional awareness and customer satisfaction survey every two years



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RTO 2008–2013 Strategic Plan

Goal 6: Follow a decision-making structure that provides oversight and advances RTP goals

Key strategies

- Support strategic and collaborative program oversight
- Coordinate RTO program strategies and investments with the Regional Mobility Program
- Develop an equitable and sustainable funding plan



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RTO 2008–2013 Strategic Plan Priorities

- Support new capital investments
- Reach additional employers and commuters
- Enhance traveler information services
- Market travel options to new residents and people who relocate



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RTO 2008–2013 Strategic Plan Priorities

- Support development of parking management strategies in centers
- Support public-private partnerships
- Apply individualized marketing strategies
- Continue implementation of the Drive Less/Save More



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Learn more about the Regional Travel Options Program



www.metro-region.org/traveloptions
Pam Peck, Regional Travel Options
peckp@metro.dst.or.us



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www.metro-region.org



Draft
February 2008

2008–2013 Strategic Plan

REGIONAL TRAVEL OPTIONS

 Metro | *People places. Open spaces.*



A New Look at Transportation

Linking Transportation to Land Use, the
Economy and the Environment

2035 Regional Transportation Plan

Kim Ellis, Principal Transportation Planner
Metro | Portland, Oregon



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2035 Regional Transportation Plan Update

Project Timeline

June '06 -March '07

- Research and Policy Development

March-Sept. '07

- System Development and Analysis (federal)

Oct. '07-March '08

- Review & Adoption Process (federal)

March -Oct. '08

- Evaluation Framework and Scenarios Analysis (state)
- Funding Framework (state)

Nov. '08-April '09

- System Development and Funding Strategy (state)

Summer/Fall '09

- Review & Adoption Process (final plan)



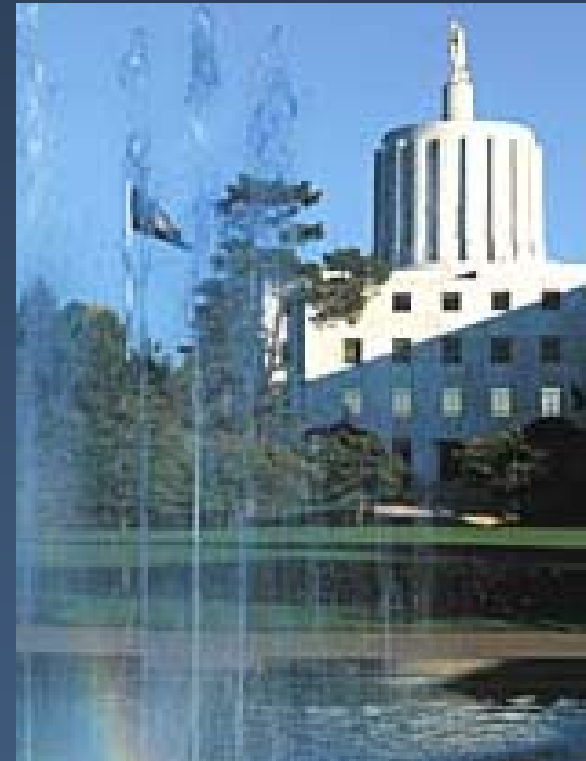
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2035 Regional Transportation Plan Update Where We Are Now

- Federal component approved by U.S. DOT on Feb. 29
- Consultation with local and state agencies and MCCI
- Addressing input received to date on work program
- Refinement of work program for LCDC approval



2035 Regional Transportation Plan Update Key Work Program Elements

- Funding Framework and Strategy
- Evaluation Framework and Performance Measures
- Transportation Investment Scenarios Analysis
- System Development and Analysis



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2035 Regional Transportation Plan Funding Framework & Strategy

Issues to address

- Significant gap between projects & funding
- Continued funding shortfall and shift of funding burden to local governments
- Rising costs and aging infrastructure threaten ability to fund new capacity and growing backlog of aging infrastructure

Work Program Objectives

- Strengthen relationship between RTP policies and funding decisions
- Confirm definition of regional system
- Define what sources, new mechanisms and responsibility for various needs
- Develop long-term strategy and commitments



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2035 Regional Transportation Plan Evaluation Framework

Issues to address

- Elected officials advocating for new tools to inform decision-making and priorities
- **Work Program Objectives**
- Develop framework for identifying needs, and evaluating and prioritizing investments
- Continue LOS evolution to consider mobility policy within a broader set of measures that are directly linked to RTP policies
- Create 3 layers of measures - region-wide, mobility corridors and community building
- Establish on-going monitoring system



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2035 Regional Transportation Plan Update

Old and New

RTP
State
Component

Current Measures

- Highway capacity
- Mode shares

New Measures

- Safety
- Reliability
- Access
- Mobility corridor capacity
- Land use effects
- Environmental effects
- Equity
- Economic effects
- Return on investment



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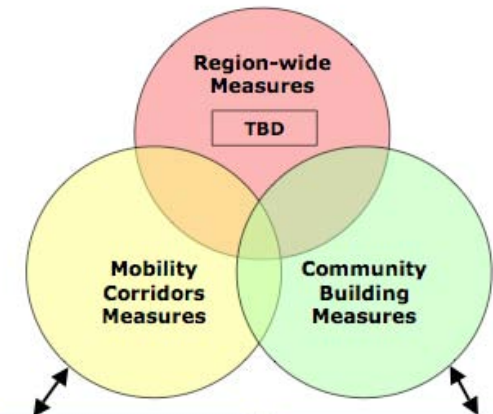
Evolution of RTP Performance Measures

2000 (2020) RTP

**Table 1.2
Regional Motor Vehicle
Performance Measures**
*Mid-day and A.M/P.M Peak
Level-of-Service for 2040
design types and Principal
Arterial Routes*

**Table 1.3
2040 Regional Non-SOV
Modal Targets**
*Non-SOV Modal Targets by
2040 design type*

2007 (2035) RTP



**Table 3.16
Regional Motor Vehicle
Performance Measures**
*Mid-day and A.M/P.M
Peak Level-of-Service for
2040 design types and
Principal Arterial Routes*

Other measures TBD

**Table 3.17
2040 Regional Non-
SOV Modal Targets**
*Non-SOV Modal
Targets by 2040
design type*

Other measures TBD

Investment Scenarios Analysis

Issues to address

- Need better understanding of the effects of different investment choices

Work Program Objectives

- Evaluate distinct policy choices that frame boundaries of political landscape and public opinion
- Test RTP policies to understand the relative cost and effect of choices on travel behavior and development patterns
- Test proposed evaluation framework performance measures
- Starting point for RTP System Development and rec'd policy refinements



2035 Regional Transportation Plan System Development

RTP
State
Component

Issues to address

- Define what package of investments best support 2040 Growth Concept and RTP goals

Work Program Objectives

- Evaluate different levels and packages of investments
- Balance land use and transportation
- Update financially constrained system
- Define "state system of investments" linked to long-term funding strategy

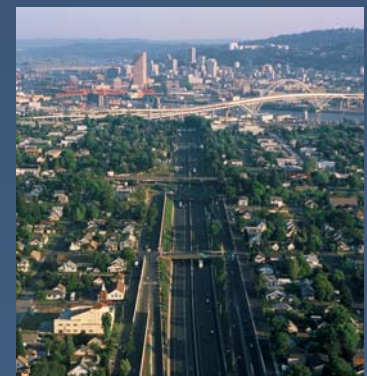


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2035 Regional Transportation Plan Update

Parallel Planning Activities

- Other Making the Greatest Place Tracks
 - *Focused Investments/Placemaking*
 - *Urban/rural reserves*
 - *Performance-Based Growth Management*
 - *Regional Infrastructure Analysis*
- High Capacity Transit System Plan
- Regional Transportation System Management and Operations Plan
- Regional Freight Plan
- ODOT Tolling Analysis



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2035 Regional Transportation Plan Update Public Process

RTP
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- Metro policy and technical advisory committees & work groups
- Stakeholder workshops
- Fact sheets and print media
- Open houses and public hearings
- Project website



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2035 Regional Transportation Plan Update

Upcoming Milestones

RTP
State
Component

March '08

- Finalize work program; kick-off funding discussion

April/May '08

- Council/JPACT/MPAC direction on scenarios analysis principles

Oct./Nov. '08

- Scenarios results released

Dec. '08

- Council/JPACT/MPAC direction on policy refinements & system development principles



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