

A G E N D A

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232-2736
TEL 503-797-1916 | FAX 503-797-1930



METRO

| | | |
|-----------------|--|---|
| MEETING: | JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION | |
| DATE: | June 12, 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. | ANNOUNCEMENTS |
| | | * Oregon Transportation Commission Earmark Policy Jason Tell |
| 7:50 AM | 6. | CONSENT AGENDA Rex Burkholder, Chair |
| | 6.1 | * Consideration of the JPACT minutes for April 25, 2008 and May 2, 2008 |
| | 6.2 | * Resolution No. 08-3952, For the Purpose of Amending the 2008-09 unified Planning Work Program and the 2008-11 Metropolitan Transportation Improvement Program to Allocate Intelligent Transportation System Program Funds to the PORTAL Achieved Data User Services Project |
| | 7. | ACTION ITEMS |
| 7:50 AM | 7.1A | * Performance-based Growth Management – <u>ACTION REQUESTED</u> Carl Hosticka |
| 7:55 AM | 7.1B | * RTP Performance Measures – <u>Discussion & Preliminary Direction</u> Deena Platman |
| 8:20 AM | 7.2 | * Resolution No. 08-3956, For the Purpose of Endorsing Regional Priorities for State Transportation Funding Legislation – <u>ACTION REQUESTED</u> Andy Shaw |
| | 8. | INFORMATION ITEMS |
| 8:30 AM | 8.1 | * Portland – Milwaukie Light Rail Locally Preferred Alternative – <u>INFORMATION</u> – Action scheduled for July 10 th Bridget Wiegart |
| 8:40 AM | 8.2 | * Columbia River Crossing Locally Preferred Alternative – <u>INFORMATION</u> – Action scheduled for July 10 th Ross Roberts |
| 8:50 AM | 8.3 | # TriMet 2009 Transit Investment Plan – <u>INFORMATION</u> Fred Hansen |
| 9:00 AM | 9. | 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: kelsey.newell@oregonmetro.gov
To check on closure or cancellations during inclement weather please call 503-797-1700.

2008 JPACT Work Program

06/05/08

| | |
|--|--|
| January 2009 | <p>July 10, 2008</p> <ul style="list-style-type: none"> • Milwaukie LRT Preferred Alternative – Approval • Columbia River Crossing Preferred Alternative – Approval • 2008-11 STIP Modernization "cut" package – Approval • Air Quality Update |
| February 2009 | <p>August 14, 2008</p> <ul style="list-style-type: none"> • RTP Funding Framework – Discussion • Oregon Transportation Research Center – Program Overview |
| March 2009 | <p>September 11, 2008</p> <ul style="list-style-type: none"> • Regional Flexible Fund Allocation, Step 2 – Briefing • Intro ODOT TIP Projects • I-5/99W Preferred Alternative RTP Amendment • Lake Oswego to Portland DEIS Funding Plan |
| April 2009 | <p>October 9, 2008</p> <ul style="list-style-type: none"> • Release MTIP for public comment • Adopt regional position on state funding strategy • RTP Scenarios Analysis Report – Joint JPACT/MPAC Discussion (Oct. 22nd) |
| <p>May 8, 2008</p> <ul style="list-style-type: none"> • Transportation Finance Options – Discussion • Regional Flexible Fund Allocation, Step 1 – Action • Regional Flexible Fund Allocation – Step 2: Local Distribution Ranking Criteria <p>May 22, 2008</p> <ul style="list-style-type: none"> • SB 566 Program – Approval • Transportation Finance Options – Discussion | <p>November 13, 2008</p> <ul style="list-style-type: none"> • Wash., DC Trip – Debrief last year; prepare for next year • RTP Scenarios Analysis Recommended and Policy Refinements – Joint JPACT/MPAC Discussion (Nov. 12th) <p>MTIP Hearings</p> |
| <p>June 12, 2008</p> <ul style="list-style-type: none"> • Milwaukie Preferred Alternative – Briefing • Columbia River Crossing – Briefing • State Transportation Finance Package – Preliminary Direction • Performance-based Growth Management • TriMet 5-year TIP Comments • RTP Evaluation Framework – Discussion <p>Reg. Flex Fund Application Deadline</p> | <p>December 11, 2008</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 • Confirm RTP system develop-principles and criteria |



METRO

Joint Policy Advisory Committee on Transportation

MINUTES

May 8, 2008

7:30 a.m. – 9:00 a.m.

Council Chambers

MEMBERS PRESENT

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

AFFILIATION

Metro Council
Metro Council
City of Portland
City of Beaverton, representing Cities of Washington Co.
TriMet
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

MEMBERS EXCUSED

James Bernard
Dick Pedersen
Royce Pollard
Steve Stuart
Bill Wyatt

AFFILIATION

City of Milwaukie, representing Cities of Clackamas Co.
DEQ
City of Vancouver
Clark County
Port of Portland

ALTERNATES PRESENT

Nina DeConcini
Donna Jordan
Susie Lahsene
Dean Lookingbill

AFFILIATION

DEQ
City of Lake Oswego, representing Cities of Clackamas Co.
Port of Portland
SW RTC

STAFF

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

1. CALL TO ORDER

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

2. INTRODUCTIONS

There were none.

3. CITIZEN COMMUNICATIONS

John A. Charles: Mr. Charles, of Cascade Policy Institute, submitted a letter addressing the committee's misuse of the term "high capacity transit." He provided comparisons between Portland's light rail and bus service, ridership and cost to New York's exclusive bus lanes. He encouraged members to consider his proposed alternative for the Columbia River Crossing (CRC) project. (Submittal included as part of the meeting record.)

Mayor Rob Drake appreciated Mr. Charles point of view. However, he disagreed, stating that it is more cost effective to implement mass transit now. He cited increased population and reduced oil resources as reasoning.

Gwen Baldwin: Ms. Baldwin represented neighborhoods in the unincorporated areas of Multnomah County in the Lake Oswego to Portland corridor. She emphasized that the committee consider the High Capacity Transit (HCT) system plan and 2040 growth concept plan when discussing MTIP funding allocation, traffic congestion and density impacts and project funding prioritization. She stated that the complete HCT should guide all decision-making for fixed rail projects including the Lake Oswego to Portland project.

Sharon Nassett: Ms. Nassett distributed maps outlining potential property impacts to Vancouver, Washington and a packet of materials on the National Environmental Policy Act (NEPA) process for the CRC project. She requested that JPACT submit a formal letter stating that staff have thoroughly addressed and met the funding requirements for the project. (All handouts included as part of the meeting record.)

Commissioner Sam Adams requested the CRC staff submit a letter addressing her concerns with the project's process.

4. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

Chair Burkholder distributed an updated memorandum on the JPACT Retreat deliverables and a handout on the Blue Ribbon Trails Committee lead by Council President David Bragdon.

In addition, Chair Burkholder announced that a joint MPAC/JPACT infrastructure workshop and joint ULI/Metro Regional Transportation Finance Expert Panel are scheduled for May 28th and June 26th respectively.

5. CONSENT AGENDA

**Correction to the JPACT minutes for March 13, 2008
Consideration of the JPACT meeting minutes for April 10, 2008**

MOTION: Mayor Rob Drake moved to approve the consent agenda

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

6. INFORMATION ITEMS

6.1 Metropolitan Transportation Improvement Program (MTIP) Regional Flexible Fund Allocation – Step 1

Mr. Andy Cotugno (with assistance from Ted Leybold) of Metro presented TPAC's recommendation/proposal for the Step 1 allocation to regional programs and additional direction for the Step 2 allocation process for local project applications. He stated that as a package TPAC's recommendation passed almost unanimously, but noted numerous split votes on components of the package.

MOTION: Commissioner Lynn Peterson moved, Councilor Robert Liberty seconded to approve Resolution No. 08-3942.

Discussion: Members expressed concern with the reduced funding allocation for step 2; specifically in comparison to historical values allocated to local governments.

Although, Commissioner Ted Wheeler respected TPAC's recommendation, he emphasized his expectation that future federal, state and regional funds be used to support the Willamette River Bridges. Mr. Tell added that if JPACT seeks state and federal funds, the committee must be able to illustrate the local support and priority for the Willamette River Bridges.

Additional discussion included bike and pedestrian projects, the importance of prioritizing funding sources and that the adopted alternatives for the Lake Oswego to Portland Transit project incorporated the concerns of the project's Public Advisory Committee.

AMENDMENT #1: Commissioner Sam Adams moved, Ms. Susie Lahsene seconded, that the percentage reserved for local projects should be reconsidered in the next round and that this reduction in funds available for local distribution not be viewed as establishing a precedent.

ACTION TAKEN ON AMENDMENT #1: With all in favor and two opposed (Drake and Liberty), amendment #1 passed.

AMENDMENT #2: Councilor Liberty moved, Commissioner Peterson seconded, to allow local governments to apply for Transit Oriented Development (TOD) project funding, beyond the regional TOD program funding, in the second step.

ACTION TAKEN ON AMENDMENT #2: With all in favor, amendment #2 passed.

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

6.2 Metropolitan Transportation Improvement program (MTIP) Regional Flexible Fund Allocation – Step 2: Local Ranking Criteria

Mr. Ted Leybold of Metro briefly overviewed the updated 2010-13 regional flexible fund solidification and relative weighting of measurement criteria.

The committee discussed the allocation of \$7.4 million to pedestrian and bicycle projects in step 2 and what projects would qualify for these funds. There was also discussion of ConnectOregon's project prioritization and accountability process as a possible model for Step 2.

MOTION: Mr. Fred Hansen moved, Councilor Donna Jordan seconded, to approve TPAC's recommendation on the solicitation and relative weighting of measurement categories.

AMENDMENT #1: Councilor Liberty moved, Ms. Nina DeConcini seconded, to incorporate the term "and environmental justice communities" to the options for underserved populations category and to shift the mixed-use areas implementation and environmental enhancement and mitigation category percentages to the following:

| Measurement categories | Solicitation categories | | | |
|--|-----------------------------|-------------------------------|---|--|
| | Regional mobility corridors | Mixed-use area implementation | Industrial and employment area implementation | Environmental enhancement and mitigation |
| Compact urban form and economic opportunity | 15% | 60% 55% | 15% | 5% |
| Options for underserved populations <u>and environmental justice communities</u> | 5% | 5% 10% | 5% | N/A 10% |
| Environmental stewardship | 5% | 5% | 5% | 90% 80% |

Discussion: Commissioner Peterson was concerned that 5% percent allocated to options for underserved populations did not emphasized this category's priority.

ACTION TAKEN ON AMENDMENT #1: With all in favor, the motion passed.

Councilor Liberty stated that he originally intended to make two amendments requiring a return-on-investment (ROI) analysis for all the proposals. But in light of the limited amount

of time left for the meetings, he would welcome a simple acknowledgement that staff and project proponents' attempt to quantify benefits per unit of cost for all projects. Those benefits would reflect the range of objectives to be achieved. He added that he agreed with Ms. Lahsene that we should track actual performance in delivering benefits from approved projects. Finally Councilor Liberty said that in the next MTIP process an ROI process could be formalized.

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

6.3 Draft STIP Modernization Recommendation

Mr. Tell provided a brief updated in the 2010-13 Statewide Transportation Improvement Program (STIP). In February, JPACT made a recommendation to ODOT on where to cut the required \$26 million of modernization funding for the current 2010-13 STIP; among these projects was the US 26: 185th to Cornell project. ODOT Region 1 and TPAC recommended that the 2010-13 modernization funds (\$15 million) be used to restore the 185th to Cornell project.

MOTION: Mr. Tell moved, Commissioner Roy Rogers, moved to restore funding to the US 26: 185th to Cornell project into the draft STIP modernization project.

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

7. INFORMATION / DISCUSSION ITEMS

7.1 SB 566 Recommendation: Preview of Information for Special JPACT meeting on May 22nd

Mr. Tell indicated that Senate Bill 566 has directed the Oregon Transportation Commission (OTC) to conduct a study to evaluate Oregon's highway system, with input from highway users, local governments and the Federal Highway Administration. The purpose of the study is to identify specific highway projects required to reduce traffic congestion, improve freight mobility and enhance safety.

ODOT Region 1 has drafted two lists in response to SB 566: a draft list of highway projects (identified by the current RTP) and a list of projects with projected costs of over \$100 million. JPACT will be asked to take action on these lists at their May 22nd meeting.

Members recommended text be added defining priority of projects on the \$100 million list.

7.2 Transportation Finance

This item was rescheduled for the May 22nd meeting.

8. ADJOURN

Seeing no further business, Chair Burkholder adjourned the meeting at 9:05 a.m.

Respectfully submitted,

Kelsey Newell
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR MAY 8, 2008

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

| ITEM | TOPIC | DOC DATE | DOCUMENT DESCRIPTION | DOCUMENT NO. |
|------|------------------|-------------|--|--------------|
| 3.0 | Letter & Article | 5/08/08 | To: JPACT From: John Charles RE: Misuse of the term "High Capacity Transit" Attachment:: Article entitled "Busway vs. Rail Capacity: Separating Myth from Fact" | 050808j-01 |
| 3.0 | Packet & Maps | N/A | A series of maps of downtown Vancouver, Washington, federal registrar and additional coorespondence on the Columbia River Crossing project submitted by citizen Sharon Nassett | 050808j-02 |
| 4.0 | Memo | 5/7/08 | To: JPACT From: Chair Rex Burkholder RE: JPACT Retreat Deliverables Update | 050808j-03 |
| 4.0 | Handout | 5/8/08 | Trails Blue Ribbon Committee | 050808j-04 |
| 4.0 | Flyer | N/A | Save the Date for the Joint MPAC/JPACT Infrastructure Workshop | 050808j-05 |
| 4.0 | Flyer | N/A | Save the Date for the Regional Transportation Finance Expert Panel | 050808j-06 |
| 7.1 | Chart | N/A | Draft List of Projects for ODOT Region 1 Response to Senate Bill 566 | 050808j-07 |
| 7.1 | Chart | N/A | List of Large Unfunded Projects Over \$100 Million. Distributed at meeting by ODOT Region 1. | 050808j-08 |
| | Newsletter | Spring 2008 | 2035 Regional Transportation Plan update for JPACT | 050808j-09 |



METRO

Joint Policy Advisory Committee on Transportation

MINUTES

May 22, 2008

7:30 a.m. – 9:00 a.m.

Council Chambers

MEMBERS PRESENT

Rex Burkholder, Chair
James Bernard
Kathryn Harrington
Lynn Peterson
Jason Tell
Paul Thalhofer
Don Wagner
Ted Wheeler

AFFILIATION

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

MEMBERS EXCUSED

Robert Liberty, Vice Chair
Sam Adams
Rob Drake
Fred Hansen
Dick Pedersen
Royce Pollard
Roy Rogers
Steve Stuart
Bill Wyatt

AFFILIATION

Metro Council
City of Portland
City of Beaverton, representing Cities of Washington Co.
TriMet
DEQ
City of Vancouver
Washington County
Clark County
Port of Portland

ALTERNATES PRESENT

David Bragdon
Tom Hughes
Susie Lahsene
Neil McFarlane
Lawrence Odell

AFFILIATION

Metro Council
City of Hillsboro, representing Cities of Washington Co.
Port of Portland
TriMet
Washington County

STAFF

Andy Cotugno, Ina Zucker, Andy Shaw, Kathryn Sofich, Randy Tucker, Barry Hennelly,
Richard Brandman, Kelsey Newell

1. CALL TO ORDER

Chair Rex Burkholder declared a quorum and called the meeting to order at 7:32 a.m.

2. INTRODUCTIONS

There were none.

3. CITIZEN COMMUNICATIONS

There were none.

4. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

Chair Burkholder introduced Mr. Lawrence Odell as Washington County's alternate for the meeting. Both the County's JPACT member and alternate were unavailable for the meeting. He also introduced Council President David Bragdon as the Council's JPACT alternate.

Mr. Don Wagner introduced Mary Legry as Washington Department of Transportation's JPACT alternate.

5. ACTION ITEMS

5.1 Senate Bill 566

Mr. Jason Tell provided information on Senate Bill 566, which directed the Oregon Transportation Commission (OTC) to conduct a study to evaluate Oregon's highway system. The purpose of the study is to identify specific highway projects required to reduce traffic congestion, improve freight mobility and enhanced safety.

He briefly overviewed a draft list of projects approved by TPAC and a list of projects with estimated costs of over \$100 million. Mr. Tell stated that the project lists were constructed using the project criteria and prioritization established through the recent State Transportation Improvement Program (STIP) and Regional Transportation Plan (RTP) cycles. He highlighted new language added (per direction from JPACT) to clarify that projects over \$100 million could be funded in phases.

Additional conversation included gas tax and division of funding received.

MOTION: President Bragdon moved, Commissioner Lynn Peterson seconded, to:

1. Recognize the legislature has directed OTC to recommend projects to be considered for funding for transportation funding package that may be considered by the '09 legislature.
2. Recognize the OTC has defined the task as modernization projects consistent with STIP criteria.

3. Endorse the project list developed by ODOT Region 1 and find it consistent with advancing projects under development in the STIP consistent with the newly adopted RTP.
4. Recognize the list of potential projects over \$100 million that are beyond the financial capacity of this exercise, many of which are going through a planning or project development process to define the specific scope to include in the RTP.

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

6. INFORMATION ITEMS

6.1 **Transportation Finance**

6.1.1 *Report from Regional Transportation Authority Subcommittee*

Commissioner Peterson provided a brief update on the Regional Transportation Authority. Despite the potential for a state funding increase, the subcommittee has identified a large funding gap for local projects. In response, the committee recommended the Portland Metropolitan Region's leaders agree to pursue a transportation funding proposal in May 2010. The funding source would be an increased vehicle registration fee and funds generated would be distributed between local and regional projects. The proposal would fund: (1) several large regional projects; (2) city and county projects; (3) alternative mode-supporting facilities; and (4) freight-mobility projects.

JPACT supported the subcommittee's charge and thanked Commissioner Peterson for chairing the group. Discussion included the "spiderweb", freight weight/mile fees and funding for several regional projects based upon proportional use of facilities, governance and the ballot measure process.

6.1.2 *Report from Regional Lobby Group on State Package*

Mr. Andy Shaw of Metro provided a brief update on the regional lobby group's draft state legislative transportation priorities. He highlighted the policy themes, draft policy and the new potential revenue sources. JPACT will be asked to make a formal endorsement of the principles at their June meeting. Final action on the principles is anticipated for fall 2008.

Commissioner Peterson recommended language be added to highlight the region's move from its dependence on gas taxes towards alternative funding sources.

Committee discussion included the equity among the jurisdictions (e.g. timber counties), potential funding sources through the Western Climate Initiative, ODOT regional flexible funds, transfer of ODOT roads to regional and jurisdictional responsibility, public communication and the connections between land use, transit and livability.

7. **ADJOURN**

President Bragdon reminded members of the June 26th Urban Land Institute and Metro joint event on transportation finance.

Councilor Kathryn Harrington reminded members of the May 28th joint MPAC/JPACT infrastructure workshop to discuss land use and transportation.

Chair Burkholder directed TPAC to discuss and report back to JPACT on prioritization of the regional corridors.

Seeing no further business, Chair Burkholder adjourned the meeting at 8:40 a.m.


Respectfully submitted,

Kelsey Newell
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR MAY 22, 2008

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

| ITEM | TOPIC | DOC DATE | DOCUMENT DESCRIPTION | DOCUMENT NO. |
|-------------|--------------|-----------------|--|---------------------|
| | Work program | 5/22/08 | 2008 JPACT Work Program updated on 5/22/08 | 052208j-01 |
| 3. | Letter | 5/21/08 | To: Rex Burkholder From: John Osborn RE: CRC and NEPA process | 052208j-02 |
| 5.1 | Chart | N/A | Updated list of the large unfunded projects with estimated costs of over \$100 million | 052208j-03 |
| 5.1 | Draft Motion | N/A | Draft JPACT SB 566 Motion | 052208j-04 |
| 6.1 | Resolution | N/A | Resolution No. 08-3921 and Exhibit A | 052208j-05 |

| | | |
|--|---|--------------------------------|
| Oregon Department of Transportation  POLICY | NUMBER Transportation Commission-10 | SUPERSEDES New |
| | EFFECTIVE DATE 05/13/2008 | PAGE NUMBER 01 OF 03 |
| | VALIDATION DATE | |
| | REFERENCE Oregon Transportation Commission Minutes, May 13, 2008 | |
| SUBJECT Federal Reauthorization Highway Program Earmark Requests | | |

PURPOSE

The Oregon Transportation Commission (Commission) establishes the following policy on highway program earmark requests in the federal surface transportation reauthorization legislation in order to ensure input from local stakeholders on the Oregon Department of Transportation's (Department) earmark requests, advance broadly supported projects that are recognized as regional or statewide priorities, clearly explain expectations for earmarks for state highway projects, strengthen regional prioritization processes, and secure funding that will help deliver projects.

POLICY

In the next surface transportation authorization legislation, the Commission intends to present Oregon's congressional delegation a limited number of earmark requests for transportation projects that are strategic investments in Oregon's transportation system, address important transportation problems, and have broad support. In advancing these projects, the Department commits to delivering each project if a sufficient earmark is secured by the congressional delegation. The Department shall provide or help provide matching funds and make up any shortfalls for projects on the official Commission Earmark Requests List to ensure these projects are delivered.

In developing the official Commission Earmark Requests List, the Commission shall consider recommendations from Area Commissions on Transportation (ACTs), Metropolitan Planning Organizations (MPOs), and other advisory bodies, as well as statewide priorities and available budget for providing required match and fully funding the project.

Department region staff and local government agencies shall work together through the ACT or similar bodies 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. Because of the important role MPOs play in determining transportation priorities within urban areas, ACTs are expected to coordinate with MPOs, seek their input for projects within MPO boundaries, and consider MPO priorities as they recommend projects. ACTs shall also seek input from any other important transportation advisory bodies within their boundaries.

ACTs and similar advisory bodies are to prepare Earmark Recommendation Lists and supporting documentation that demonstrates how each project meets the Earmark Request Criteria set forth in this policy. The Commission shall review and consider projects on the Earmark Recommendation

Lists to prepare the official Commission Earmark Requests List. The Commission may also consider recommendations from its statewide advisory committees such as the Oregon Freight Advisory Committee (OFAC) and MPO priority lists submitted to ACTs or similar bodies.

Projects that have the support of multiple parties including local governments, area and statewide transportation advisory committees, and the Department region shall be preferred over ones that have less support. 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 that only contribute to but do not fully fund construction of a new project.

The Department's limited resources dictate that earmarks requested from the congressional delegation should complete or nearly complete the funding needed to deliver a project so there is no need for a significant additional infusion of resources. The Commission may give preference to earmark requests that provide the "last dollar" for a project or project phase to fill a shortfall after other funding has been allocated.

Earmark Request Criteria

The Commission establishes the following criteria for earmark requests made by the Department. The Commission shall only make requests for projects that meet these criteria.

- *Strategic Investment:* The project is a strategic investment that addresses problems on Oregon's transportation system, is included in or consistent with an existing transportation plan document or needs list, and has been identified as a regional or state priority. Projects shall provide significant benefits to Oregon and its transportation system in areas such as economic development, freight mobility, environmental quality, congestion relief and mobility improvement, safety, and other priority areas.
- *Meets STIP Criteria:* Projects recommended for earmark requests shall 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 concerns and demonstrate that it has no known fatal flaws. The work shall begin during the timeframe of the transportation authorization legislation (2010-2015).
- *Funding:* Earmark funding, when combined with funding already committed to the project and additional available resources, shall be used to complete the project or a project phase, which may include planning, environmental work and project development, preliminary engineering, right of way acquisition, or construction. Construction of the project may be structured in phases so that the earmark funds received will complete construction of a segment of the project.

Earmark Sponsor Roles and Responsibilities

Any local agency¹, organization, business, or other entity that requests and secures earmark funding for a project not on the official Commission Earmark Requests List takes on the role of the project's sponsor. The earmark requestor shall be expected to provide the required non-federal matching funds. When a project not on the Commission Earmark Requests List receives an earmark, the

¹ For purposes of this policy, the definition of "local agency" includes, but is not necessarily limited to, cities, counties, metropolitan planning organizations, ports, special districts, federally recognized Native American tribes, and other units of government.

Department may provide additional funds for the project only in accordance with the Department's funding priorities and only to the extent funds are available after Commission approved earmark requests are fully funded and after other funding priorities have been met. This policy shall 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 the Department.

Nothing in this policy is intended to prevent a local agency from seeking an earmark for a project on the state or local transportation system. Rather, this policy is intended to foster partnerships with local agencies, explain how the Department intends to invest its scarce resources, and explain the circumstances under which the Commission and Department shall accept responsibility for funding projects.

Use of Earmarks for Local Contribution to State Highway Projects

Earmarks for projects on the state highway system are generally intended to supplement rather than supplant state and local resources already committed to the project, and the Commission's earmark requests shall be focused on filling gaps in projects that have not been fully funded. Earmarks for state highway projects shall first be applied to any unfunded balance; once a project is fully funded, earmarks secured by local agencies may be counted toward the local agency's expected contribution.

Guidance for Preparing Earmark Recommendation Lists

BACKGROUND

In the next surface transportation authorization legislation, the Oregon Transportation Commission (Commission) intends to present Oregon's congressional delegation a limited number of earmark requests for transportation projects that are strategic investments in Oregon's transportation system, address important transportation problems, and have broad support. In advancing these projects, ODOT commits to delivering each project if a sufficient earmark is secured by the congressional delegation. ODOT will provide or help provide matching funds and make up any shortfalls for projects on the official Commission Earmark Requests List to ensure these projects are delivered.

The Commission intends to have Area Commissions on Transportation (ACTs) and other advisory bodies recommend the most appropriate and highest priority projects for which to request earmarks in the reauthorization bill. This guidance explains the process and the steps ACTs and similar bodies will follow to create Earmark Recommendation Lists for consideration by the Commission as required by the Commission Policy on Federal Reauthorization Highway Program Earmark Requests, available at www.oregon.gov/ODOT/HWY/federal_affairs.shtml.

Each ACT and ACT-like body will be asked to prepare an Earmark Recommendation List containing a small number of priority projects. The Earmark Recommendation Lists will serve two primary purposes. The lists will be used by the Commission in its selection of projects for the Commission Earmarks Request List. The Earmark Recommendation Lists will also be provided to members of the Oregon congressional delegation to show which projects in each district have been determined to be regional priorities. ACTs and similar advisory bodies will develop these Earmark Request Lists during the summer and provide them to ODOT by the end of September so the Commission can approve its Earmark Request List in December.

BACKGROUND ON EARMARKS

Projects that receive congressional earmarks are considered federal-aid highway projects and are subject to all federal-aid highway requirements. Under the federal transportation program, ODOT administers all federal-aid highway earmarks and works with local agencies to help them deliver projects. For a partial explanation of earmark and federal-aid highway requirements, see *Federal-Aid Funding for High Priority Project Sponsors*, available online at www.oregon.gov/ODOT/docs/LocalProjectSponsorsGuide.pdf.

Earmarks in the most recent surface transportation authorization act, SAFETEA-LU, required a non-federal match of at least 11.45% of the earmark amount, and it is anticipated that earmarks in the next surface transportation authorization act will have a similar requirement. Earmarks in the next authorization bill will not be available until the legislation is signed into law, which will likely be in 2010 or 2011. Funding from earmarks comes available in a fractional amount each year, and all funding is on a reimbursement basis; no cash is provided up front to pay for projects.

EARMARK SPONSOR ROLES AND RESPONSIBILITIES

Under Commission policy, any local agency¹, organization, business, or other entity that requests and secures earmark funding for a project not on the official Commission Earmark Requests List takes on the role of the project's sponsor. The earmark requestor will be expected to provide the required non-federal matching funds. When a project not on the Commission Earmark Requests List receives an earmark, the Department may provide additional funds for the project only in accordance with the Department's funding priorities and only to the extent funds are available after Commission approved earmark requests are fully funded and after other funding priorities have been met. 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, as required under federal law.

Earmarks for projects on the state highway system are generally intended to supplement rather than supplant state and local resources already committed to the project, and the Commission's earmark requests will be focused on filling gaps in projects that have not been fully funded. Earmarks for state highway projects will first be applied to any unfunded balance; once a project is fully funded, earmarks secured by local agencies may be counted toward the local agency's expected contribution.

COMMISSION EARMARK REQUEST CRITERIA

Earmark projects are often modernization or bridge projects, and the Commission has established requirements for such projects in the Statewide Transportation Improvement Program (STIP) criteria. Therefore, projects recommended for earmark funding requests should meet the approved STIP criteria as set forth in the *STIP Project Eligibility Criteria and Prioritization Factors*. Earmark projects often have further requirements or special considerations due to their earmarked status; therefore, the Commission established the following additional criteria for ODOT earmark requests. The Commission will only make requests for projects that meet these minimum Earmark Request Criteria:

- *Strategic Investment:* The project is a strategic investment that address problems on Oregon's transportation system, is included in or consistent with an existing transportation plan document or needs list, and has been identified as a regional or state priority. Projects should provide significant benefits to Oregon and its transportation system in areas such as economic development, freight mobility, environmental quality, congestion relief and mobility improvement, safety, and other priority areas.
- *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.

¹ For purposes of the Commission's policy on earmarks, the definition of "local agency" includes, but is not necessarily limited to, cities, counties, metropolitan planning organizations, ports, special districts, federally recognized Native American tribes, and other units of government.

- *Readiness:* The project has been developed enough to identify potential concerns and demonstrate that it has no known fatal flaws. The work will begin during the timeframe of the transportation authorization legislation (2010-2015).
- *Funding:* Earmark funding, when combined with funding already committed to the project and additional available resources, will be used to complete the project or a project phase, which may include planning, environmental work and project development, preliminary engineering, right of way acquisition, or construction. Construction of the project may be structured in phases so that the earmark funds received will complete construction of a segment of the project.

ADDITIONAL GUIDELINES FOR PROJECT RECOMMENDATIONS

ACTs should also consider these general guidelines when selecting projects:

- *Project Type:* Most earmark funding for Oregon highway projects in SAFETEA-LU went to modernization projects. Bridges and Transportation Enhancement projects also received substantial funding, but other types of projects, including safety and operations, are also eligible for earmark funding.
- *Project Timeline:* The next reauthorization bill will likely be signed into law in 2010 or 2011 and will continue through the end of federal Fiscal Year 2015. Earmark funding will come available after the bill becomes law and will be available in annual increments through 2015. Funding should only be requested for projects or project phases that will begin during this period. Project selection should take into account that not all funding will be available immediately upon enactment of the legislation, though tools such as Advance Construct can be used to address issues related to availability of funds.
- *Earmark Request Size:* Oregon's highway project earmarks in SAFETEA-LU, the last surface transportation authorization act, ranged from \$90,000 to \$23.5 million, with a mean of about \$4 million and a median size of \$2 million. ACTs should limit earmark requests to no more than \$25 million, as no project in Oregon received more than this amount in SAFETEA-LU. ACTs should generally not recommend earmarks of less than \$1 million.

ODOT has limited ability to fill any funding gap remaining after securing an earmark, so ACTs should recommend projects that could reasonably cover funding gaps with an earmark. ACTs should also consider that the amount of funding secured is usually significantly lower than the amount requested. For example, in SAFETEA-LU ODOT received only 41% of the amount of funding requested for projects on the Commission earmark request list. ACTs should ensure that there is a commitment to bridging any remaining funding gap and a contingency plan that will allow projects to move forward even if full funding is not secured.

STEPS TO PREPARE AN EARMARK RECOMMENDATION LIST AND SUBMIT IT TO THE COMMISSION FOR CONSIDERATION

STEP 1: Agency/MPO/ACT Coordination

ODOT region staff, local government agencies, and Metropolitan Planning Organizations (MPOs) should work together through the ACT or a similar body to identify and recommend appropriate projects that are high priorities for the area and have broad support. The ACTs or similar advisory committees should participate in selecting and recommending projects for earmark requests as they do for modernization projects. ODOT staff will provide information and assistance for the ACTs to:

- Consider any existing project needs list.
- Evaluate potential earmark projects against the current *STIP Project Eligibility Criteria and Prioritization Factors*.
- Evaluate potential earmark projects against the Commission Earmark Request Criteria.
- Communicate with any affected local government agencies not participating in the ACT and appropriate statewide advisory committees.
- Recommend appropriate high-priority projects with broad support to the Commission for inclusion in the Commission Earmark Requests List.

Local agencies and ODOT regions will be asked to submit their potential earmark requests, particularly for projects on the state highway system, to the ACTs for consideration and potential inclusion in Earmark Recommendation Lists and the Commission Earmark Requests List. ODOT staff and local agencies who wish to propose projects for ACT consideration should fill out a Reauthorization Earmark Proposal Form and submit it to ACT staff and the ODOT Area Manager. The Reauthorization Earmark Proposal Form is available online at www.oregon.gov/ODOT/HWY/federal_affairs.shtml.

The ACTs should do this work during their regular meetings that are advertised and open to the public. A full description of ACT responsibilities, duties, and expectations is presented in the *Policy on Formation and Operation of the ACTs*, available on the ACT website at www.oregon.gov/ODOT/COMM/act_main.shtml.

Coordination with Metropolitan Planning Organizations

Because of the important role MPOs play in determining transportation priorities within urban areas, the Commission expects ACTs to coordinate with MPOs and seek their input for projects within MPO boundaries. Each MPO should submit a list of priority projects to their respective ACT prior to the ACT's selection of projects, and ACTs should take this input into consideration as they recommend projects. These MPO lists of priority projects may contain any of the types of project that can be included on an Earmark Recommendation List, including state highway projects, projects on the local road system, and transit projects (see below). ACTs should also seek input from any other important transportation advisory bodies within their boundaries.

STEP 2: Prepare the Earmark Recommendation List

Each ACT should prepare a list of one to five priority projects. The Earmark Recommendation List need not be put in priority order.

Size and Number of Projects

While ACTs will not be provided funding targets, they should attempt to balance the number and size of requests. For example, ACTs that recommend large earmarks should advance fewer projects, while those that recommend smaller earmarks can advance more projects. ACTs are urged to present earmark request lists that are in line with their population; smaller ACTs should generally put forward a smaller total dollar amount, while larger ACTs may request a larger total dollar amount.

Project Types

Because the Earmark Recommendation Lists will be provided to the congressional delegation as well as to the Commission, ODOT will not restrict ACT recommendations to the state highway system. ACT lists may include the following types of transportation projects:

- state highway projects,
- local projects that benefit the state highway system,

- local projects that do not benefit the state highway system,
- transit projects.

Local Projects

The Commission Earmark Request List will include state highway projects that meet the earmark criteria listed on page 2 of the Commission Policy on Federal Reauthorization Highway Program Earmark Requests and may include local projects that benefit the state highway system. Local agency projects may be considered for inclusion on the Commission Earmark Request List if they meet the Oregon Highway Plan (OHP) Policy 2B: Off-System Improvements. The OHP is available online at www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml. The Commission Earmark Request List will not include local projects that do not demonstrably benefit the state highway system. However, ACTs may consider local projects and include those that are deemed regional priorities on their Earmark Recommendation List to demonstrate support for these projects to the congressional delegation.

Transit Projects

Because of the important role public transit plays in Oregon's transportation system, ACTs may include a separate section of their list for transit projects to show support for projects that will be requested by local transit agencies. These projects will not be included in the Commission Earmark Requests List, but they will be included in the list of identified regional priorities that will be provided to the congressional delegation. The list of transit projects will not count against the limit on highway projects ACTs can include on their list.

Timeline

Local agencies and ODOT staff are asked to submit their project proposal forms to ACT staff and the ODOT Area Manager by **July 7th** to allow ample time for ACTs and similar advisory bodies to consider and recommend projects. Any agency that cannot meet this deadline should coordinate with their ODOT Area Manager and ACT staff to seek an extension. Proposals submitted after this deadline should be considered by ACTs as practical and appropriate.

MPOs should submit their priority lists to the ODOT Area Manager and ACT staff by **July 7th** to ensure that ACTs can consider these priorities in their selection process. MPOs should coordinate with their ODOT Area Manager and ACT staff if they will have difficulty meeting this deadline.

ACTs should develop a process for selection of projects to recommend in June and July. This may include creation of a special subcommittee to recommend a list of priority projects.

ACTs should develop and approve their lists of recommended projects in August and September. ACTs are encouraged to utilize existing project recommendation lists, such as their SB 566 project lists and 2010-2013 STIP recommendations, to simplify this process.

ACTs must complete their Earmark Recommendation Lists and provide them to the ODOT Director's Office, by way of the ODOT Area Manager, by **September 30, 2008**. Any ACT lists received after this date will be considered as practical and appropriate by the Commission.

When ACTs have completed their Earmark Recommendation Lists, ODOT will request supplemental information on each non-transit project included on those lists in order to select projects for the Commission's Earmark Request List. This supplemental information will be due in October.

STEP 3: Commission Review of Earmark Recommendation Lists

ODOT will draw on the Earmark Recommendation Lists for the creation of the official Commission Earmark Requests List. Projects on the Commission list may also be drawn from other sources, including recommendations from statewide advisory bodies such as the Oregon Freight Advisory Committee (OFAC) and MPO priority lists provided to ACTs. As ACTs and similar bodies are primarily involved in selecting modernization projects, it is anticipated that most projects on Earmark Recommendation Lists will be highway modernization projects, and the Commission may draw on other sources for other types of projects, such as bridges and operations/ITS projects.

The Commission will also consider recommendations from ODOT Regions and Areas, statewide priorities, and available budget for providing required match and fully funding the project to develop the list of transportation earmark requests that will be sent to the congressional delegation. 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 that only contribute to but do not fully fund construction of a new project. Projects that have the support of multiple parties including local governments, business and community groups, area and statewide transportation advisory committees, and the ODOT region will be preferred over ones that have less support.

For Further Information

Please direct any questions on the Commission Policy on Federal Reauthorization Highway Program Earmark Requests or the process for regional project selection to Travis Brouwer, ODOT Federal Affairs Advisor, at (503) 986-3448 or by e-mail to travis.brouwer@odot.state.or.us.

Commission Earmark Requests List Process Schedule 2008-09

| Tasks | Feb 08 | Mar | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec | Jan 09 |
|---|--------|-----|-----|-----|------|------|-----|------|-----|-----|-----|--------|
| Draft Earmark Policy to Commission for approval to start outreach | X | | | | | | | | | | | |
| Outreach on the Draft Earmark Policy | X | X | X | | | | | | | | | |
| Earmark Policy to Commission for approval | | | | X | | | | | | | | |
| Local Agencies and ODOT prepare proposals and submit to ACTs | | | | | X | X | | | | | | |
| ODOT Regions, Local Agencies, ACTs and MPOs collaborate to prepare lists | | | | | X | X | X | X | | | | |
| ACTs send lists to ODOT Director's Office | | | | | | | | X | | | | |
| ODOT staff compiles ACT lists and prepares draft Earmark Requests List for Commission | | | | | | | | | X | X | | |
| Commission reviews Earmark Recommendation Lists and draft Earmark Requests List | | | | | | | | | | X | | |
| Commission approves Earmark Requests List | | | | | | | | | | | X | |
| ODOT presents congressional delegation Commission Earmark Request List | | | | | | | | | | | | X |

REAUTHORIZATION EARMARK PROPOSAL FORM

Please fill out this form to propose that a project be considered by an ACT or similar body for inclusion on an Earmark Recommendation List that will be sent to the Oregon Transportation Commission and Oregon's congressional delegation. Supplemental information will be requested for each project included on an Earmark Recommendation List to determine whether the meets the Commission Earmark Request Criteria. Filling out this form does not constitute an application for funding.

Instructions

- Please carefully read the Oregon Transportation Commission's Policy on Federal Reauthorization Highway Program Earmark Requests as well as the associated Guidance for Preparing Earmark Recommendation Lists before filling out this form. The policy and guidance are available at www.oregon.gov/ODOT/HWY/federal_affairs.shtml.
- To ensure consistency, please fill out form using 10 point Arial font.
- Letters of support may be attached.
- E-mail completed form to ACT and ODOT staff listed in the table below by **July 7**.
- Please direct any questions to the ODOT Area Manager or to Travis Brouwer, ODOT Federal Affairs Advisor, at (503) 986-3448 or by e-mail to travis.brouwer@odot.state.or.us.

| Area of State | ODOT Staff | ACT Staff |
|---|---|---|
| Central Oregon ACT: Deschutes, Crook, Jefferson counties | Gary Farnsworth, gary.c.farnsworth@odot.state.or.us | Andrew Spreadborough, aspreadborough@coic.org |
| Cascades West ACT: Linn, Benton, Lincoln counties | Vivian Payne, vivian.b.payne@odot.state.or.us | Scott Wilson, swilson@ocwcog.org |
| Hood River County | Rich Watanabe, richard.f.watanabe@odot.state.or.us | -- |
| Lane County | Sonny Chickering, sonny.p.chickering@odot.state.or.us | -- |
| Lower John Day ACT: Wasco, Sherman, Gilliam, Wheeler counties | Sam Wilkins, sam.l.wilkins@odot.state.or.us | Michelle Colby, michelle.colby@co.gilliam.or.us |
| Portland Metropolitan Region: Multnomah, Washington, Clackamas counties | Travis Brouwer, travis.brouwer@odot.state.or.us | -- |
| Mid Willamette Valley ACT: Marion, Polk, Yamhill counties | Tim Potter, james.t.potter@odot.state.or.us | Richard Schmid, rschmid@mwvcog.org |
| Northeast ACT: Morrow, Umatilla, Union, Wallowa, Baker counties | Frank Reading, frank.h.reading@odot.state.or.us | Glenis Harrison, glenis.harrison@odot.state.or.us and Nancy Martin, nancy.e.martin@odot.state.or.us |
| Northwest ACT: Columbia county | David Kim, david.kim@odot.state.or.us | Mary McArthur, mbmcarthur@att.net |
| Northwest ACT: Clatsop and Tillamook counties | Larry McKinley, larry.mckinley@odot.state.or.us | Mary McArthur, mbmcarthur@att.net |
| Rogue Valley ACT: Josephine and Jackson counties | Art Anderson, arthur.h.anderson@odot.state.or.us | Pat Foley, pfoley@rvcog.org |
| South Central ACT: Klamath and Lake counties | Butch Hansen, norman.c.hansen@odot.state.or.us | Christina Ingram, christina@scoedd.org |
| South East ACT: Harney, Malheur, Grant counties | Rena Cusma, rena.m.cusma@odot.state.or.us | Sondra Lino slino@orednet.org |
| South West ACT: Douglas, Coos, Curry counties | Mark Usselman, mark.usselman@odot.state.or.us | Yvonne Lind, Yvonne.Lind@odot.state.or.us |

SECTION 1: PROJECT INFORMATION

Project name (route and segment):

Jurisdiction owning facility:

Entity proposing project:

**Contact information for proposer
(name, phone number, e-mail):**

Is this project inside an MPO boundary? If so, please list the MPO and note whether the project is included in the Regional Transportation Plan.¹

SECTION 2: PROJECT COST AND FUNDING

Estimated total project cost for phases that have not been completed:

Has this estimate been determined through a valid and detailed cost estimate?²

At what stage in the project development process was this estimate completed?

Total funding currently dedicated to the project:

Amount of earmark funds requested:

Phase(s) for which earmark is requested:

Expected start date(s) for phase(s) for which funding is requested:

SECTION 3: PROJECT DESCRIPTION

Describe the problem this project is designed to solve.³ Please limit this description to 350 words or less.

Describe the project and how it will solve the problem described above. Please limit this description to 350 words or less.

List agencies, organizations, businesses, and others who support this project.

¹ ACTs and similar advisory bodies should consult with MPOs on any project within an MPO boundary.

² To be valid, a cost estimate should, at minimum, be expressed in year of expenditure dollars, using accepted rates of project cost inflation.

³ This should be consistent with problem statements from planning or NEPA documents.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING) RESOLUTION NO. 08-3952
THE 2008-09 UNIFIED PLANNING)
WORK PROGRAM AND THE 2008-11) Introduced by Rex Burkholder
METROPOLITAN TRANSPORTATION
IMPROVEMENT PROGRAM TO
ALLOCATE INTELLIGENT
TRANSPORTATION SYSTEM
PROGRAM FUNDS TO THE PORTAL
ARCHIVED DATA USER SERVICES
PROJECT

DRAFT

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects to receive transportation-related funding and the Unified Planning Work Program (UPWP) includes transportation planning activities of Metro and other area governments involved in transportation planning activities; and

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council must approve the MTIP and the UPWP and any subsequent amendments to allocate funding to projects; and

WHEREAS, the JPACT and Metro Council approved the 2008-11 MTIP on August 16, 2007 and the 2008-09 UPWP on April 17, 2008; and

WHEREAS, the 2008-11 MTIP established a \$3,000,000 program fund for Intelligent Transportation System (ITS) projects and conditioned the allocation on project recommendations by TransPort Subcommittee to the Transportation Policy Alternatives Committee (TPAC); and

WHEREAS, TPAC supports the recommendation of the TransPort Subcommittee to the TPAC to allocate \$203,000 to the PORTAL Archived User Data Service project to fund database management and enhancements; and

WHEREAS, this allocation of \$203,000 is not included in the 2008-11 MTIP and the 2008-09 UPWP Regional Mobility Program budget summary; and

WHEREAS, this change to programming for this project is exempt by federal rule from the need for conformity determination with the State Implementation Plan for air quality; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT to amend the 2008-11 MTIP to allocate \$203,000 from the ITS program for the PORTAL Archived Data User Service project and amend the Regional Mobility Program budget summary in the 2008-09 UPWP.

ADOPTED by the Metro Council this [insert date] day of [insert month], 2008.

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

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: June 4, 2008
TO: JPACT and Interested Parties
FROM: Deena Platman, Metro
TransPort Subcommittee of TPAC
SUBJECT: MTIP Allocation for PORTAL Archived Data User Service

Action

Approve Resolution 08-3952, for the purpose of amending the 2008-11 Metropolitan Transportation Improvement Program (MTIP) and the 2008-09 Unified Planning Work Program to allocate Intelligent Transportation System program funds to the PORTAL Archived Data User Service project.

Background

PORTAL is the official Archived Data User Service (ADUS) for the Portland Metropolitan region as specified in the Regional ITS Architecture. Located at Portland State University (PSU), PORTAL provides a centralized, electronic database that facilitates the collection, archiving, and sharing of information/data for public agencies within the region. The data stored in PORTAL includes loop detector data from freeways in the Portland metropolitan region, weather data, incident data, VMS message data, truck volumes, and a large sample of bus Automatic Vehicle Location (AVL) data. PORTAL receives 20-second volume, occupancy and count data for Portland-area freeways from ODOT in real-time. This data has been archived since July 2004 and the retrieval and archiving process is fully automated. Weather data is retrieved from HYDRA and METAR as available and is archived automatically. The incident and VMS data archival process is semi-automated; incident information from July 1999 through December 2007 is archived as well as VMS messages from 2006 and 2007.

The creation of the PORTAL data archive was supported by a \$500,000 CAREER grant to Dr. Robert Bertini from the National Science Foundation (NSF). This investment has created a data archive and web interface to the archive. In addition, FHWA (through ODOT) has supported the purchase of hard disc storage, the region has invested in the development of the communications network to support the electronic transfer of data, and TransPort has previously helped select some particular enhancements (e.g. incident data and bottleneck analysis) to be funded through a 2005 ITS Integration earmark.

The PORTAL data archive is a valuable resource for both researchers and practitioners. The availability of the PORTAL archive has made research projects such as the System-Wide Adaptive Ramp Metering (SWARM) evaluation, development of arterial performance measures, and freeway travel time evaluations and improvements possible. Most recently, PORTAL provided data to support development of the Columbia River Crossing DEIS, 2035 Regional Transportation Plan, and the Regional Freight and Goods Movement Plan. Finally, PORTAL, and related research projects at PSU, increase the visibility of the Portland region and provide good "marketing" for local agencies. Looking ahead, PORTAL will be a necessary tool for implementing the region's Congestion Management Process and provide valuable

information to the development of transportation system plans, corridor planning, and system management and operations.

Current Status

The NSF funding that has supported the development and maintenance of PORTAL recently concluded. While ODOT data continues to be automatically retrieved and archived, PSU can no longer provide the oversight to ensure the quality of the data nor will there be any enhancements to PORTAL. It simply withers.

PORTAL needs a sustainable source of funding to both survive and flourish as the region's data archive. The upcoming Regional Transportation System Management and Operations (TSMO) Refinement Plan process will work towards a long-term strategy for PORTAL and the region's data archive needs. The plan will be completed by Fall 2009. In the interim, a source of funding is necessary to sustain PORTAL until the TSMO Refinement Plan is completed.

Funding Recommendation

TransPort, recognizing both the importance of a regional data archive service and the substantial investment to date in software development and communications infrastructure to support PORTAL, advocates for the regional financial support for on-going maintenance and enhancements.

In partnership with PSU, TransPort has developed a program and funding recommendation for PORTAL. The recommendation requests that Metro obligate \$203,000 of the \$3,000,000 in regional flexible funds allocated for the TSMO program in the 2010-11 MTIP for PORTAL. At their May 14, 2008 TransPort meeting, members approved the recommendation. TPAC unanimously approved the recommendation at their May 30, 2008 meeting.

The request would support one 0.5 FTE PSU professional staff and two graduate research assistants for a two-year period. The services provided to the region include:

- PORTAL System Maintenance - Handling of all software, hardware, and system upgrades that impact PORTAL.
- PORTAL Training and Support - Two group training sessions per year for regional agency partners. These sessions will also be used to obtain feedback on PORTAL.
- PORTAL Sustainability - In the first year, work will be required to improve the professionalism and maintainability of the PORTAL system including code maintenance, documentation, and testing.
- PORTAL Enhancements - To support its function as an active data archive, PORTAL will be enhanced with additional functionality. Possibilities include customized performance reports, incorporation of new data types. Enhancements to be determined by an advisory committee.

A PORTAL advisory committee will be established with input from TPAC and TransPort. The advisory committee will determine what features will be added to PORTAL each year. Advances in PORTAL will be communicated to the transportation community through presentations and publications. The advisory committee will also look into establishing a sustainable funding approach for the long-term management of the database.

As a condition of the TSMO program funding, TransPort's recommendation to TPAC, JPACT, and Metro Council on the allocation of these funds should consider a number of elements including:

- Consistency with National ITS architecture and Standards;
- First consideration to a project of similar scope to the Tualatin-Sherwood Road ATMS: I-5 to 99W;
- Consideration to projects defined in the Clackamas County ITS application

- Developed through a Regional Concept of Transportation Operations process or as part of an opportunity fund for supportive infrastructure or spot improvements
- Evaluated in the context of a regional strategy for use of programmatic ITS funding.

The recommendation to obligate MTIP funds for PORTAL is consistent with and/or supportive of the elements listed above. The National ITS Architecture as well as the Portland Regional ITS Architecture identified data archiving as a core user service. In addition, the Clackamas County ITS plan includes regional archived data management in its architecture. With enhancements, PORTAL will also be a valuable tool for archiving data and evaluating performance for ATMS corridors such as Tualatin-Sherwood Road. Although the recommendation to obligate funds comes in advance of the completion of Regional TSMO Refinement Plan, the Portland Regional ITS Architecture acknowledges the key role of PORTAL to provide “a centralized, electronic database that facilitates the collection, archiving, and sharing of information/data for public agencies within the region.” The data is used by many agencies for planning, design, safety, operations, and research; and with sustained investment can be made more robust into the future.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 08-3952, FOR THE PURPOSE OF AMENDING THE 2008-09 UNIFIED PLANNING WORK PROGRAM AND THE 2008-11 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ALLOCATE INTELLIGENT TRANSPORTATION SYSTEM PROGRAM FUNDS TO THE PORTAL ARCHIVED DATA USER SERVICES PROJECT

Date: May 23, 2008

Prepared by: Deena Platman

BACKGROUND

In the 2010-2011 MTIP, JPACT and Metro Council identified \$3 million in new programmatic funding for Intelligent Transportation System (ITS) projects. The program funds were conditioned on the TransPort Subcommittee of TPAC making a recommendation on the allocation of these funds to TPAC, JPACT, and Metro Council. Further, TransPort recommendation was required to consider the following items:

- Consistency with National ITS architecture and Standards;
- First consideration to a project of similar scope to the Tualatin-Sherwood Road ATMS: I-5 to 99W;
- Consideration to projects defined in the Clackamas County ITS application
- Developed through a Regional Concept of Transportation Operations process or as part of an opportunity fund for supportive infrastructure or spot improvements
- Evaluated in the context of a regional strategy for use of programmatic ITS funding.

To meet the conditions for allocation of ITS programmatic funds, Metro sought and received a 2007-09 Transportation and Growth Management (TGM) grant to develop the Regional Transportation System Management and Operations (TSMO) Refinement Plan, which will result in the allocation of 2010-11 MTIP funds programmed for ITS and establish priorities for future funding. A comprehensive recommendation is expected by fall of 2009.

In advance of the a 2009 Regional TSMO Refinement Plan, TransPort is recommending allocation of \$203,000 from the ITS program fund to respond to the immediate need to support the PORTAL Archived Data User Service, hosted and managed by the Oregon Transportation Research and Education Consortium (OTREC) at Portland State University.

The memo in Exhibit A provides a more detailed description of PORTAL, its services, and value to the region. It also describes how MTIP funding would be used. In summary, the regional partners and OTREC have made a significant investment in the development of a regional data archive. To date, the on-going management of PORTAL has been supported by a grant from the National Science Foundation (NSF). With the NSF funding now depleted, PORTAL no longer has a funding source and is not being supported or maintained. This allocation would support .5 FTE for an OTREC professional data manager and two graduate students, who will manage and enhance PORTAL.

The \$203,000 MTIP allocation would provide bridge funding for two years until the Regional TSMO Refinement Plan has been completed and a long-term strategy to support PORTAL has been determined. The requested allocation is consistent with the program considerations listed above.

The 2008-09 Unified Planning Work Program (UPWP) includes two objectives for improvements to the regional data archive under the Regional Mobility Program. This amendment provides additional funding consistent with the UPWP

ANALYSIS/INFORMATION

1. **Known Opposition** There is no known opposition to the proposal.
2. **Legal Antecedents** Amends the 2008-11 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 07-3825 on August 16, 2007 (For the Purpose of Approving the 2008-11 Metropolitan Transportation Improvement Program for the Portland Metropolitan Area). Amends the 2008-09 Unified Planning Work Program adopted by Metro Council Resolution 08-3929 on April 17, 2008 (For the Purpose of Approving the 2008-09 Unified Planning Work Program for the Transportation Planning in the Portland/Vancouver Metropolitan Area).
3. **Anticipated Effects** Adoption of this resolution will allocate federal transportation funding for the maintenance and enhancement of PORTAL, the regional data archive service.
4. **Budget Impacts** None

RECOMMENDED ACTION

Metro Staff recommends the approval of Resolution No. 08-3952.

M E M O R A N D U M

600 NORTHEAST GRAND AVENUE
TEL 503 797 1768

PORTLAND, OREGON 97232 2736
FAX 503 797 1930



METRO

To: JPACT
From: Chris Deffebach and Ted Reid, Long Range Policy and Planning
Date: June 3, 2008
Re: Performance-Based Growth Management

Metro is implementing an outcome-based approach in many of its efforts, including its own operating budget. Outcome-based approaches are familiar to JPACT as they are being incorporated into the RTP process. Performance-Based Growth Management (PBGM), one of the tracks on the *Making the Greatest Place* work program, is also an outcome-based approach. On June 12, 2008, Metro staff will present a brief PBGM introduction to JPACT. PBGM's purpose is to allow for a more robust conversation about how different growth management strategies measure up to the region's aspirations. Under such a system, any policy decisions and public investments that influence urban form and capacity could be considered growth management decisions. PBGM will provide the framework for greater coordination of land use and transportation investment decisions.

On June 19, the Metro Council will consider a resolution that is a first, formal step towards designing a PBGM system. The resolution articulates the region's desired outcomes with respect to creating successful communities and commits the Metro Council to work with regional partners to develop the decision-making process necessary to create those communities. MPAC has recommended the Council's adoption of the resolution.

One component of creating a PBGM system will be the development of performance indicators (measures) that gauge progress towards desired outcomes. The indicators will be used retrospectively (to report the region's past performance) and prospectively (reporting the results of modeled scenarios) in an adaptive management system that keeps the region's long-term goals at the forefront of all decisions. Using existing 2040 indicators as a starting point, Metro staff will work with stakeholders to develop indicators for each of the "desired outcome" statements found in the aforementioned resolution. The performance indicators being developed through the RTP will be integrated into this framework. We will also continue to report those performance indicators that are mandated by state statute.

For this outcome-based approach to be most effective, it needs to be relied upon not just by Metro, but also by the region's cities and other entities. The intent is that these performance indicators, as well as Metro's scenario modeling capabilities, be regarded by local jurisdictions as valuable tools for framing policy and investment choices.

The accompanying handout provides a comparison of PBGM with the existing growth management system as well as portions (desired outcomes and guiding principles) of the proposed resolution.

A Definition of a Successful Region

(as approved by the Metro Policy Advisory Committee on May 14, 2008, and included as Exhibit A to Resolution no. 08-3940, to be considered by the Metro Council in June 2008)

1. People live and work in vibrant communities where they can choose to walk for pleasure and to meet their everyday needs.
2. Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
3. People have safe and reliable transportation choices that enhance their quality of life.
4. The region is a leader in minimizing contributions to global warming.
5. Current and future generations enjoy clean air, clean water and healthy ecosystems.
6. The benefits and burdens of growth and change are distributed equitably.

Guiding Principles of Performance-based Growth Management

(as approved by the Metro Policy Advisory Committee on May 14, 2008, and included as Exhibit B to Resolution no. 08-3940, to be considered by the Metro Council in June 2008)

1. The new growth management approach should be outcome-oriented, with the outcomes endorsed through regional commitment to a definition of performance or outcome.
2. The new approach should be transparent, allowing for explicit weighing of community values and desired outcomes.
3. Performance or outcome should be defined in a way that is readily measurable and has clear cause-and-effect linkages with policy choices.
4. A combination of measures will be used to assess progress toward meeting the region's goals and will inform decisions about which policy tools are needed to achieve the desired outcomes.
5. Measurements should accommodate local aspirations and should support equitable outcomes across the region while also achieving region-wide goals.
6. The new approach will link performance measures reporting directly with growth management decisions.
7. The new approach should rely on an integrated set of policy and financial tools, including public investments, land supply decisions, local zoning and other strategies.
8. Strategies should be aligned at the regional, local, state and federal level to support progress toward achieving the outcomes desired for the region and to effectively leverage private investment.
9. Changes to state statute and administrative rules may be needed to fully implement this approach.

Comparison of growth management systems

| CURRENT SYSTEM | PERFORMANCE-BASED SYSTEM |
|--|--|
| Focuses on land supply as primary determinant of whether region is achieving its growth management objectives | Evaluates multiple characteristics of great communities against benchmarks to determine urban performance |
| Uses a state-mandated list of performance indicators (e.g. refill rate, sales price of vacant land) that does not have an intuitive relationship with the region's goals | Uses performance indicators that describe whether the region's goals are being met, illustrating people's everyday experiences (e.g. average commute time) and pressing concerns (e.g. greenhouse gas emissions) |
| Driven by state requirements | Designed to support shared local and regional aspirations and to respond to market and other global conditions |
| Relies primarily on a single tool: management of the urban growth boundary by Metro | Relies on coordinated use of multiple tools, including public investment and local zoning as well as land supply decisions (including urban and rural reserves as well as the UGB itself). Leverages public and private investments. |
| Cyclical (statutory five-year UGB cycle) | Adapts to changing circumstances on a more frequent basis, driven by performance indicators |
| Focuses on Metro Council land use actions | Involves collaboration with and empowerment of multiple actors, including local governments, school and special districts, and private developers, as well as Metro Council |
| Focuses on specific population and employment forecasts to meet 20-year land need for housing and jobs | Focuses on a range of population and employment forecasts and can better adapt to actual growth trends |
| Relies on past infill and redevelopment rates to determine future land needs | Recognizes that changes in policies and investments can also influence future land needs |

M E M O R A N D U M

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



METRO

DATE: June 4, 2008
TO: Metro Council, JPACT and MPAC Members and Interested Parties
FROM: Kim Ellis, Principal Transportation Planner
Deena Platman, Principal Transportation Planner
SUBJECT: RTP Performance Measurement Framework

Purpose

This memo summarizes Regional Transportation Plan (RTP) performance measures work completed to date and describes the overall framework for evaluating and monitoring the 2035 RTP. The memo also recommends a set of performance measures to be further evaluated as part of the RTP Investment Scenarios analysis this summer. The recommended measures were narrowed from more than 100 potential performance measures identified in the federal component of the 2035 RTP (*dated December 14, 2007*). The process for developing, testing and refining the performance measures will be iterative throughout the RTP update process, and coordinated with the Performance-Based Growth Management work that is also underway.

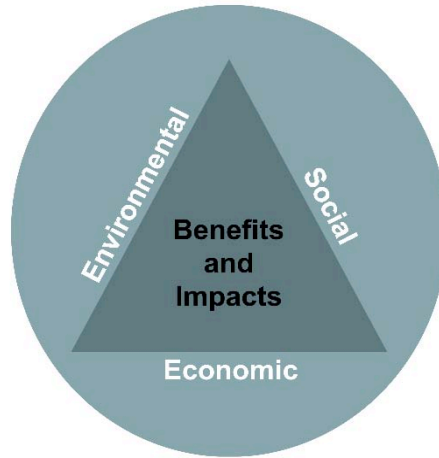
Action Requested

Preliminary direction on the RTP Performance Measurement Framework and the advancement of predictive performance measures into the RTP Investment Scenarios analysis phase for further evaluation and refinement (See Attachment B).

Background

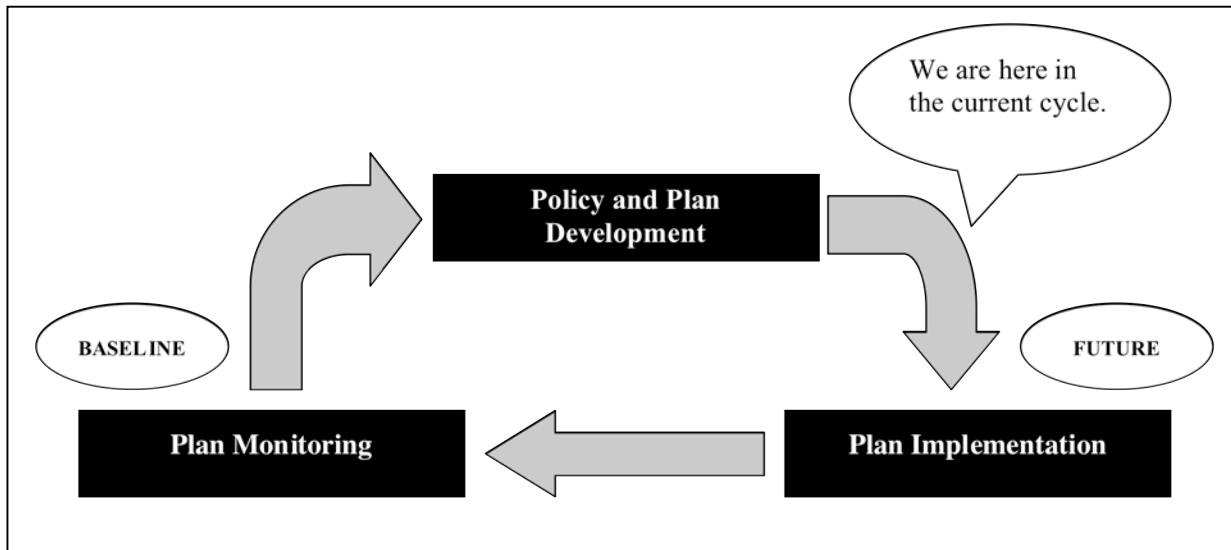
The primary aim of the 2035 Regional Transportation Plan (RTP) is to implement the Region 2040 vision for land use, transportation, the economy, and the environment. To accomplish this, the 2035 RTP Update is embracing new ways to think more holistically and strategically about how to efficiently and effectively move people and freight around and through the Portland metropolitan region. A key element is the development and application of an outcomes-based evaluation framework that considers economic, social and environmental benefits and impacts as shown in Figure 1.

Figure 1. RTP Outcomes-Based Performance Measure Framework



Performance measurement is a critical element of this approach, creating a communication tool to convey progress towards meeting planning goals, provide data for system evaluation and assist policy development and investment decision-making. Development of a performance measurement framework also satisfies benchmarks mandated by the Oregon Transportation Planning Rule (TPR) and federal requirements to establish a performance monitoring system as part of the region's Congestion Management Process (CMP). Figure 2 provides a diagram of the performance measurement cycle.

Figure 2. RTP Performance Measurement Cycle



RTP Performance Measure Work Group Process and Recommendations

The RTP Performance Measure (PM) Work Group comprised of TPAC and MTAC members/alternates, and other key stakeholders are leading the effort to identify performance measures in this framework. The process for developing, testing and refining the performance measures will be iterative throughout the RTP update process, and coordinated with the Performance-Based Growth Management work that is also underway.

Since Fall 2007, Metro convened six meetings of the work group. Attachment A includes the roster of work group members. Initially, the work group focused on defining a framework for RTP performance measurement and establishing a set of guiding principles to select candidate measures. The guiding principles used to narrow the list of potential performance measures are shown in Table 1.

Table 1. Principles to Guide Selection of RTP Performance Measures

| | |
|--|---|
| 1. Reflect RTP Goals and Objectives | <i>Measures reflect the underlying goals and objectives expressed in RTP policy.</i> |
| 2. Compliance | <i>Measures comply with Oregon Transportation Plan, Oregon Highway Plan, Transportation Planning Rule, and Congestion Management.</i> |
| 3. Specific impacts | <i>Measures assess specific impacts of outcomes the RTP can influence.</i> |
| 4. Consider system user | <i>Measures should address how people use/experience the transportation system</i> |
| 5. Relevant and comprehensible | <i>Measures are relevant to and easily understood by elected officials, staff, and public.</i> |
| 6. Manageable | <i>Identify a manageable number of measures that provide value to the decision-making process.</i> |
| 7. Simple data | <i>Data is relatively simple to collect, report and maintain.</i> |
| 8. Replicable or translatable | <i>Measures should be replicable or able to translate between policy constructs.</i> |
| 9. Comparable | <i>Measures allow comparison with other regions.</i> |

On May 19, 2008, the RTP Performance Measure Work Group endorsed the staff recommended performance measurement framework and selected system evaluation measures for assessment in the RTP investment scenarios phase. The recommended measures were narrowed from more than 100 potential performance measures identified in the federal component of the 2035 RTP (*dated December 14, 2007*).

Recommended RTP Performance Measurement Framework

The framework reflects the continued evolution of regional transportation planning from a primarily project-driven endeavor to one that is framed by the larger set of outcomes that affect people’s everyday lives, commerce and the quality of life in this region. The framework acknowledges the broader impacts of transportation on these outcomes. Figure 3 lays out the RTP performance measurement framework graphically to show the elements of the performance measurement system.

Figure 3. 2035 RTP Performance Measurement Framework Elements

| | RTP Goals | Geographic Extent | Application |
|-----------------------------|---|---|--|
| Performance Measures | <ol style="list-style-type: none"> 1. Foster Vibrant Communities and Compact Urban Form 2. Sustain Economic Competitiveness and Prosperity 3. Expand Transportation Choices 4. Effective and Efficient Management of Transportation System 5. Enhance Safety and Security 6. Promote Environmental Stewardship 7. Enhance Human Health 8. Ensure Equity 9. Ensure Fiscal Stewardship 10. Deliver Accountability | <ol style="list-style-type: none"> A. Regionwide B. Mobility Corridor C. Community | <ol style="list-style-type: none"> A. Baseline Evaluation B. System Evaluation C. Plan Monitoring |

Performance Measures – Performance measures form the core of the system. They are the *quantitative method of analysis* used to evaluate condition or status to determine the degree of success a project or program has had in achieving its stated goals and objectives. Some measures can be used to predict the future as part of an evaluation process using forecasted or “predictive” data, while other measures can be used to monitor changes of based on actual empirical or observed data. In many instances, a single measure can be use to assess progress towards meeting multiple goals.

RTP Goals – The ten RTP goals each provide a statement of purpose that describes *long-term desired outcomes* for the region’s transportation system to support and implement the Region 2040 vision. In many instances, a goal has multiple performance measures providing feedback on achievement.

Geographic Extent – The first round of technical analysis for the Federal 2035 RTP demonstrated that system-level measures are no longer sufficient to determine whether investments lead to efficient and reliable corridors in the region or meet other RTP goals. The framework addresses this limitation by including three levels of geographic scale to measure performance.

- *Region-wide* measures focus on the performance of the entire metropolitan area, monitoring the plan at a system-level with the ability to compare this region’s success with other metropolitan regions of similar size. Region-wide measures are useful on a broad level but do not provide the level of detail to effectively diagnose problems or inform make decisions about individual corridors or 2040 land use types.

- *Mobility corridors* are transportation corridors centered on the region's network of interstate and state highways that include parallel networks of arterial roadways, high capacity and regional transit routes and regional trails. The multi-modal network of corridors is intended to move people and freight between different parts of the region and connect the region with the rest of the state and beyond. Measuring performance at this geographic scale will provide a not only a better understanding individual mobility corridor performance but also allow comparison of performance across multiple mobility corridors.
- *Community level measures* focus on the 2040 land use types, addressing how the physical design of the transportation system fosters an efficient urban form and vibrant communities envisioned in the 2040 Growth Concept. The 2000 RTP began this move toward community level measures by adopting the 2040 Non-SOV Modal Targets and Area of Special Concern into regional policy.

Application

The framework acknowledges the multiple uses for performance measures by defining three applications of use in the RTP.

- *Baseline evaluation* measures provide a base level of assessment about the transportation system at the beginning of an RTP update. They are the basis for considering past trends and identifying transportation needs and issues to be addressed.
- *System evaluation* measures provide the basis for evaluating alternatives and comparing different levels of transportation investment during an RTP update. This application relies largely on measures that can be forecasted into the future using predictive travel demand and land use models.
- *Plan monitoring* measures allow the region to track progress in achieving its goals and objectives over time and will inform the baseline evaluation to be conducted at the beginning of an RTP update. Monitoring will occur between RTP updates to determine whether refinements to the policy framework, investment priorities, or other plan elements are needed. Monitoring measures can draw from observed as well as modeled data. As subset of this uses is the *Congestion Management Process (CMP)*, which are targeted specifically on the efficiency and effectiveness of the transportation system to move people and goods in a timely manner. CMP measures are likely to draw from the growing availability of real-time transportation system data and will be assessed with greater frequency. In addition, some of these measures will satisfy benchmarks mandated by Statewide Planning Goals and the Oregon Transportation Planning Rule (TPR).

Recommended Performance Measures for System Evaluation

Metro staff and the RTP Performance Measure Work Group spent the past several months developing and refining a set of proposed performance measures that can be applied in the system evaluation phase of the 2035 RTP. Attachment B, RTP Goal-Performance Measure Matrix, lists all of the recommended performance measures to be advanced into the RTP Investment scenarios phase for testing. The matrix links the individual performance measures to the RTP goals they address.

Schedule

Development of the RTP Evaluation Framework and corresponding performance measures will occur in six steps during the next 18 months.

- **Step 1 – Scoping** – Completed February ‘08
Define issues to be addressed and develop a conceptual framework for identifying performance measures and mobility corridors.
- **Step 2 – Performance Measurement Framework Development** – March ‘08 to June ‘08
Develop a preliminary set of diagnostic performance measures that can be evaluated in RTP Investment Scenarios analysis and applied in Mobility Corridor Atlas.
- **Step 3 – Performance Measurement Framework Assessment** – July ‘08 to December ‘08
Apply preliminary performance measure framework to base year and future year RTP Investment Scenarios Analysis and Mobility Corridor Atlas. Evaluate results, refine measures as needed, and confirm data outputs for Mobility Corridor Atlas. Finalize Mobility Corridor Atlas report.
- **Step 4 – System Development and Analysis** – January ‘09 to April ‘09
Using insight from Step 3, develop investment criteria to guide RTP System Development task.
- **Step 5 – RTP System Development and Evaluation Framework Recommendation** – April ‘09 to June ‘09
Apply Step 4 investment criteria and compare Step 3 base year with Round 1 and Round 2 modeling outputs (region-wide, mobility corridor and community building measures). Finalize evaluation framework and performance measures recommendations (including benchmarks/targets) and identify recommended refinements to state policies. The analysis in this step will inform prioritizing regional transportation investments and result in an updated RTP financially constrained system and recommended RTP state system of investments. Create a reporting structure that can be used for ongoing CMP monitoring and satisfy benchmarks required by Statewide planning goals and the TPR.
- **Step 6 - – Adoption Process** – October - December ‘09
Release discussion draft RTP for public review. Adopt final2035 Regional Transportation Plan and provide direction to the development of local Transportation System Plans and future corridor refinement plans.

Next Steps

With endorsement of the RTP Performance Measurement Framework by MPAC, JPACT, and Metro Council, the set of predictive performance measures listed in Attachment B will be evaluated as part of the RTP Investment Scenarios analysis this summer. Results of the evaluation will be reported to technical and policy advisory committees this fall.

The RTP Performance Measure Work Group will reconvene in the fall to review results and further refine the list of performance measures based on findings. The work group will also begin to augment the predictive performance measures with other measures that draw from observed data sources, such as ODOT’s accident database or freeway loop detector, to address state and

federal requirements for on-going plan and congestion management process monitoring. The work group will recommend a set of key measures and benchmarks that will be used to monitor implementation of the plan over time. Reliability, safety, accountability, and equity are areas where observed data could be used for monitoring purposes.

Attachment A

RTP Performance Measures Work Group Members

| Member/Alternate | Organization | Metro Advisory Committee |
|-----------------------------|--------------------------------|---------------------------------|
| Frank Angelo | Angelo Planning | N/A |
| Andy Back | Washington County | TPAC |
| Bev Bookin | Bookin Group | MTAC |
| Al Burns | City of Portland | MTAC |
| Bob Cortright | DLCD | N/A |
| Kate Dreyfus | City of Gresham | N/A |
| Denny Egner | City of Lake Oswego | MTAC |
| Meg Fernekees | DLCD | MTAC |
| John Gessner | City of Fairview | MTAC |
| John Gillam/Courtney Duke | City of Portland | TPAC |
| Brian Gregor | ODOT | N/A |
| Mara Gross/Ron Carley | Coalition for A Livable Future | N/A |
| Jon Holan | City of Forest Grove | MTAC |
| Robin McCaffrey | Port of Portland | TPAC |
| Mike McCarthy | City of Tigard | MTAC |
| Jay McCoy | City of Gresham | N/A |
| Mike McKillip | City of Tualatin | TPAC |
| Louis Ornelas | Shared Vision Consulting | TPAC |
| Lidwien Rahman/Andy Johnson | ODOT | TPAC/MTAC |
| Joseph Readdy | Sera Architects | MTAC |
| Satvinder Sandhu | FHWA | TPAC |
| Kelly Betteridge/Joe Recker | TriMet | TPAC |
| Ron Weinman | Clackamas County | TPAC |



METRO RTP Goal-Performance Measure Matrix

The matrix below lists all the recommended performance measures and their relationship to the adopted RTP goals. Dots are shown for each performance measure for every RTP goal that the performance measure provides information about. While each performance measure was developed to communicate the conditions, impacts or effectiveness of actions in meeting RTP goals in one primary goal area, the matrix shows that several of the performance measures report on several goals. This demonstrates the linkages between each of the goal areas and the impact of policy decisions across environmental, economic and social boundaries.

| Recommended Performance Measures for System Evaluation | | Adopted RTP Goals | | | | | | | | | | | | | | | | | | |
|--|--|---|---|-------------------------------|---|-----------------------------|-----------------------------------|----------------------|---------------|---------------------------|------------------------|---|---|--|--|--|--|--|--|---|
| | | Foster Vibrant Communities and Compact Urban Form | Sustain Economic Competitiveness and Prosperity | Expand Transportation Choices | Effective and Efficient Management of Transportation System | Enhance Safety and Security | Promote Environmental Stewardship | Enhance Human Health | Ensure Equity | Ensure Fiscal Stewardship | Deliver Accountability | | | | | | | | | |
| 1. | Vehicle miles traveled (total and per capita) | ● | ● | | | | | | | | | | | | | | | | | |
| 2. | Average commute length and time by mode for the region, sub-districts and mobility corridors | ● | | ● | | | | | | | | | | | | | | | | |
| 3. | Average trip length by mobility corridor by trip purpose | ● | | | ● | | | | | | | | | | | | | | | |
| 4. | Average travel time for home-based non-work trips region-wide and comparing a regional average with average by land use type and by mode | ● | | | ● | | | | | | | | | | | | | | | |
| 5. | Motor vehicle and transit travel time between key origin-destinations for mid-day and PM peak | ● | ● | ● | ● | | | | | | | | | | | | | | | |
| 6. | Travel Time Index (ratio of peak period to free flow time) by Corridor | | ● | | | | | | | | | | | | | | | | | |
| 7. | Miles, percent and location of Throughways and Arterials that exceed RTP LOS-based motor vehicle performance measures in mid-day and PM peak for the region, sub-districts and Corridors | | | | ● | | | | | | | | | | | | | | | |
| 8. | Miles, percent and location of regional freight network facilities that exceed RTP LOS-based motor vehicle performance measures in mid-day and PM peak for Main Roadways and Roadway Connectors, and by Corridor | | ● | | ● | | | | | | | | | | | | | | | |
| 9. | Total delay and cost of delay on the regional freight network in mid-day and PM peak | | ● | | ● | | | | | | | | | | | | | | | |
| 10. | Non-drive alone trips and mode share region-wide, by mobility corridor and for central city and individual regional centers (Number of daily walking, bicycling, shared ride and transit trips and % by mode) | ● | | ● | ● | | | | | | ● | ● | | | | | | | | |
| 11. | Transit Level of Service (ratio of riders to seating) by Corridor for High Capacity Transit | ● | ● | ● | | | | | | | | | | | | | | | | |
| 12. | Daily transit trips per revenue hour | ● | | | | | | | | | | | | | | | | | | ● |
| 13. | Annual transit riders (total and per capita) | | | | ● | | | | | | ● | | | | | | | | | ● |
| 14. | Number and percent of households and jobs within 30 minutes of the central city, regional centers, and key employment/industrial areas for mid-day and PM peak** | ● | ● | | | | | | | | | | | | | | | | | |
| 15. | Number and percent of homes within ¼-mile and ½-mile of 2040 central city, regional centers, town centers, mainstreets, or station communities | ● | | | ● | | | | | | | | | | | | | | | |
| 16. | Number and percent of homes within ½-mile of regional multi-use trail system and ¼ mile of parks/greenspaces** | ● | | | ● | | | | | | ● | ● | ● | | | | | | | |
| 17. | Number and percent of homes within ½-mile of HCT service and ¼-mile of frequent bus service** | ● | | | ● | | | | | | | | ● | | | | | | | |
| 18. | Number and percent of environmental justice communities (Census data) within ½-mile of HCT or ¼-mile frequent bus service as compared to the region** | | | | ● | | | | | | | | ● | | | | | | | |
| 19. | Average housing and transportation costs per household* | | | | | | | | | | | | ● | | | | | | | ● |
| 20. | User cost per mile (auto & truck) | | | | | | | | | | | | ● | | | | | | | ● |
| 21. | Tons of transportation-related air pollutants (e.g. CO, ozone, and PM-10) | | | | ● | | | | | | ● | ● | | | | | | | | |
| 22. | Tons of transportation-related greenhouse gas emissions (e.g. CO ₂) | | | | ● | | | | | | ● | ● | | | | | | | | |
| 23. | Acres of regionally significant Goal 5 resources potentially affected by new transportation infrastructure** | ● | | | | | | | | | ● | | | | | | | | | |
| 24. | Total acres consumed by household & jobs* | ● | | | | | | | | | | ● | | | | | | | | |
| 25. | Households per acre by housing type and 2040 design type | ● | | | | | | | | | | | | | | | | | | ● |
| 26. | Capture rate (total number and percent of jobs and households attracted to UGB, neighbor cities, 2040 centers, corridors, and industrial/employment areas)* | ● | | | | | | | | | ● | ● | | | | | | | | ● |

Matrix Notes:

* = data derived from Metroscope analysis

** = data derived from GIS analysis

All other data derived from the EMME3 travel forecast model

No ability to predict/forecast system safety. To be addressed in plan monitoring and Congestion Management Process (CMP) measures.

No ability to predict/forecast accountability. To be addressed in plan monitoring measures.

BEFORE THE METRO COUNCIL

| | | |
|-------------------------------|---|--|
| FOR THE PURPOSE OF ENDORSING |) | RESOLUTION NO. 08-3956 |
| REGIONAL PRIORITIES FOR STATE |) | |
| TRANSPORTATION FUNDING |) | Introduced by Councilor Rex Burkholder |
| LEGISLATION |) | |

WHEREAS, an efficient and adequately funded transportation system is critical to ensuring a healthy economy and livable communities throughout the state of Oregon; and

WHEREAS, the Portland metropolitan region has become a national model for how strategic transportation investments combined with regional land use planning can improve community livability and environmental quality while supporting a strong economy; and

WHEREAS, despite the important investments that have been made possible since 2001 by three Oregon Transportation Improvement Acts and two "ConnectOregon" multimodal packages, the state and the Portland region remain several billion dollars short of what is needed to adequately address essential transportation needs over the next 20 years; and

WHEREAS, investments in maintaining and expanding transportation facilities in the Portland region are especially critical in light of the fact that the region's population is expected to grow by approximately one million people by 2030; and

WHEREAS, freight volumes are expected to increase even more quickly than population over that same time period; and

WHEREAS, additional funding to address these transportation needs will create or sustain thousands of jobs and help stimulate the economy of the region and the state; and

WHEREAS, it is critical that we plan and fund the region's transportation system in such a way as to confront the challenge posed by global climate change; and

WHEREAS, it is in the interest of local governments inside Metro to jointly seek additional transportation funding from the 2009 Oregon Legislature; and

WHEREAS, Governor Kulongoski and legislative leaders have declared that passage of a transportation funding package will be a top legislative priority in 2009; and

WHEREAS, by Resolution No. 08-3921, the region adopted "Metropolitan Region Principles for Legislative Transportation Funding Package in 2009," adopted by the Metro Council on March 13, 2008; and

WHEREAS, the priorities for funding established by this resolution are consistent with those principles; now therefore

BE IT RESOLVED that the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) endorse transportation funding priorities for the 2009 legislature as reflected in Exhibit A to this resolution.

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

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

Portland Metro Area Transportation Priorities for the 2009 Oregon Legislature

Policy

Do No Harm: Do not enact preemptions of local government revenue-raising authority. The transportation funding challenge will require new funding commitments at all levels of government.

50-30-20 Funding Distribution: Protect the established state funding formula to ensure distribution of new state-wide transportation resources as follows: 50 percent to the state, 30 percent to counties, and 20 percent to cities (“50-30-20”).

Protect Existing Assets: Oregon should protect its billions of dollars of existing transportation assets by prioritizing maintenance and preservation. New modernization projects should be funded from the state’s 50% share of new resources.

Remove Local Restrictions: Remove the requirement that county-approved vehicle registration fees must be agreed to by neighboring counties in the region.

Remove Willamette Bridge Tolling Restrictions: Eliminate existing statutory restrictions on local authority to establish tolls on Willamette River bridges in the region.

Establish A Sustainable Funding Model: With per-capita gas tax revenues in decline, Oregon should continue efforts to establish use-based transportation revenue from sources such as congestion pricing, tolls, and/or vehicle-miles-traveled fees, while maintaining cost responsibility between light vehicles and trucks.

Jurisdictional Transfers: The state should work in partnership with local jurisdictions by supporting the transfer of state-owned district highways that define arterial or multi-modal corridors, including road rehabilitation and permanent funding for maintenance.

New Revenues

Road Maintenance and Construction: New state investments in our transportation system are desperately required to address backlogged maintenance, critical safety and freight mobility projects, demand management, and bike/pedestrian projects. A 12-cent gas tax merely returns the buying power of the fuel tax to 1993 levels.

- | | |
|--|-------------------------------|
| ➤ Raise the gas tax 14¢ | \$400 million per year |
| ➤ Increase the annual VRF to \$54 | \$150 million per year |
| ➤ Index the gas tax to inflation | +\$20 million per year |

Invest in Transit: Devote new resources (including new lottery funds) to expanding bus, light rail, commuter rail, streetcar, and other public transit services and facilities that support the state’s CO₂ emissions reduction goals and efficient land use.

- **New Commitment to Transit:** Identify new, ongoing state funding to support transit.
- **Flexible Funds:** Instruct ODOT to use more flexible federal funds for public transit.
- **Elderly and disabled transit:** Increase funding for the state’s Elderly & Disabled transit program.
- **Transit Oriented Development (TOD):** Leverage private development and maximize the value of transit investments by supporting local TOD projects.

ConnectOregon III: The state’s successful multi-modal investment program should be continued with a third round of project funding.

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 1930



METRO

DATE: June 5, 2008
TO: JPACT
FROM: Bridget Wieghart
SUBJECT: Portland – Milwaukie Light Rail

Metro, TriMet and the Federal Transit Administration, in conjunction with ODOT, the Cities of Portland, Milwaukie and Oregon City, and Multnomah and Clackamas Counties, have completed a Supplemental Draft Environmental Impact Statement (SDEIS) for the Portland-Milwaukie Light Rail Project. Metro is taking comments on the SDEIS through noon on June 23rd.

The project Steering Committee is expected to recommend a Locally Preferred Alternative (LPA) at the end of June. Metro anticipates presenting the LPA and associated Land Use Final Order and RTP amendment recommendations to JPACT for action at its July 10th meeting.

On June 12th, Metro staff will brief on you the alignment options studied and the benefits and impacts. Trade offs being considered as the various project advisory committees gear up for recommendations on the LPA will also be reviewed. Attached please find a newsletter that outlines the SDEIS options, findings and project timeline.



Portland–Milwaukie

LIGHT RAIL PROJECT

www.oregonmetro.gov/southcorridor

PROJECT PARTNERS

Cities of Milwaukie,
Oregon City and Portland
Clackamas and Multnomah
counties

Oregon Department
of Transportation

TriMet

Metro

We need to hear from you!

Comment now on the Supplemental Draft Environmental Impact Statement

Our region is changing and growing. The health, sustainability and livability of our communities are indeed dependent upon the choices we make today. The Portland – Milwaukie Light Rail Project will provide a dependable way for people in our communities — from northern Clackamas County to downtown Portland — to travel in the region conveniently, safely and economically. It will connect communities and build the most important transit bridge our area has seen in a generation.

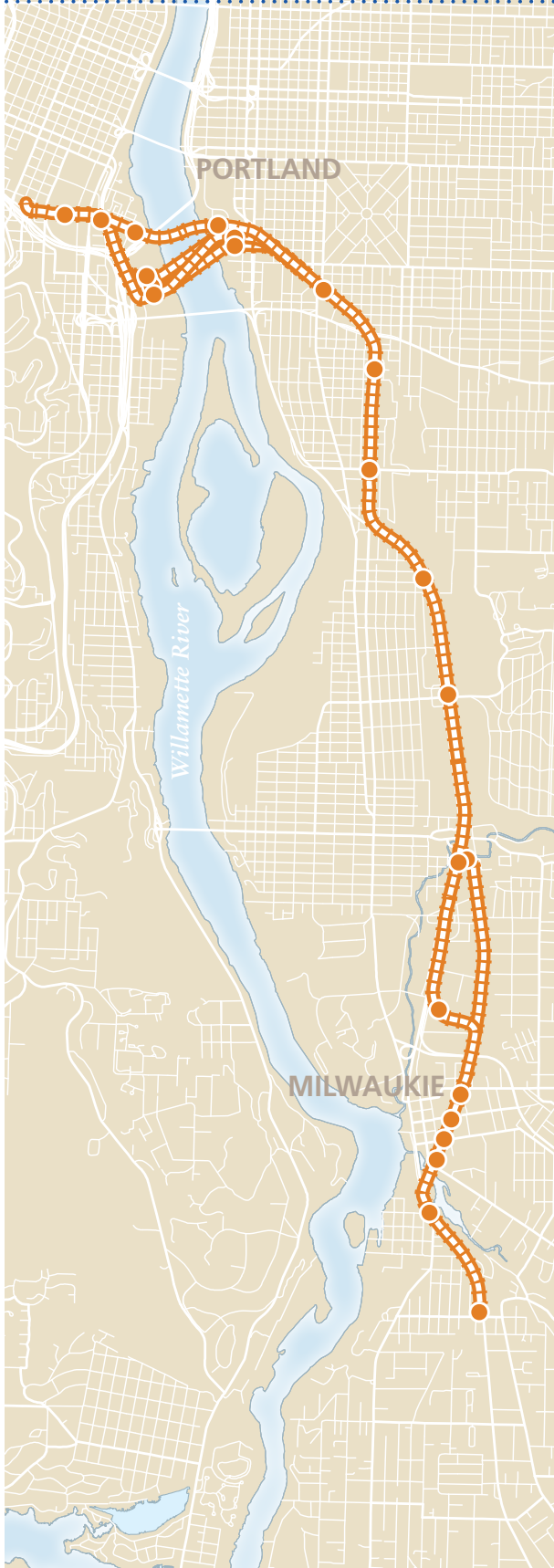
The project will construct an extension of the MAX system from downtown Portland to a terminus at Lake Road in Milwaukie or Park Avenue in the Oak Grove neighborhood of Clackamas County, a distance just over 6 miles. Metro is leading the project in partnership with TriMet, the Oregon Department of Transportation, the cities of Milwaukie, Oregon City and Portland and Clackamas and Multnomah counties. The project team just published the Supplemental Draft Environmental Impact Statement (SDEIS). The SDEIS describes the potential effects in sixteen topic areas and includes a transportation and financial analysis of the project. It also includes a Draft Section 4(f) Evaluation with Preliminary Findings of De Minimis Impacts to Public Parks, a federally-required environmental analysis that documents the costs, impacts and benefits of the project.

Now is the time to tell us what you think!

Visit www.oregonmetro.gov/southcorridor to review and comment on the SDEIS. Attend an upcoming open house or public hearing. Dates and times are listed on the back.



Metro | *People places. Open spaces.*



How we got here

A Milwaukie Light Rail connection is Phase II of the South Corridor Project

The Portland – Milwaukie Light Rail Project is the latest step in connecting our region through high capacity transit. It is a part of the regional transportation system planning that Metro undertook in the 1980s that has produced an active and vibrant light rail system.

The project was originally part of the Vancouver to Oregon City corridor in the 1990s. The northern portion became the Interstate or Yellow line, which opened for business in May 2004.

The southern portion was studied in the South Corridor Project and adopted in 2003 by all local jurisdictions and the Metro Council. Phase I of the South Corridor Project is I-205 or the Green line, which is expected to open in Fall 2009. Connecting downtown Portland to Milwaukie is Phase II. If the project moves forward, construction will begin in 2011 and you could board the new MAX line in 2015.

| DECISION-MAKING PROCESS TIMELINE | | | | | |
|----------------------------------|---|---|--|---------------------|--|
| | FALL 2007 | WINTER 2008 | SPRING | SUMMER | FALL |
| Environmental Analysis | Select and design alternatives | Analyze alternatives: <ul style="list-style-type: none"> • Environmental • Traffic • Financial | Publish Supplemental Draft Environmental Impact Statement (SDEIS) | | Initiate Final Environmental Impact Statement |
| Decision Process | | | <ul style="list-style-type: none"> • Open houses and public hearings • Steering Committee recommends locally preferred alternative (LPA) • Local government action on LPA | Metro action on LPA | |
| Public Involvement | <ul style="list-style-type: none"> • Open houses, community presentations • Newsletter, ads, web information • Citizen Advisory Committee meetings • Station Area Planning meetings | | Initiate 45-day public comment period | | <ul style="list-style-type: none"> • Community meetings • Citizen Advisory Committee meetings • Web information |

Citizen involvement

Citizen Advisory Committee helps guide project

The project’s Citizen Advisory Committee (CAC) formed in the summer 2007 and meets regularly. CAC members are local residents, business leaders and representatives from public institutions and community groups. Over the course of the year they learned about and toured the proposed alignment, participated in public meetings and reviewed the technical findings on such things as cost, acquisitions and displacements, safety and security, traffic impacts, ridership, project finance, the river crossing and station areas. They have asked questions, actively engaged in dialog and continually provided feedback and local knowledge that project staff have found invaluable. In June, the CAC is expected to make a recommendation to the Steering Committee on the river crossing, alignment and terminus and stations.

Rick Williams, Portland resident and CAC Chair reflected, “I am impressed with the level of commitment, participation and interest by our citizen stakeholders.”

Valerie Chapman, resident of Oak Grove, said she valued “the opportunity to listen to the various viewpoints of CAC members to view the project from a much wider lens.”

David Aschenbrenner of Milwaukie is proud that “future generations will benefit from our work.”

Lance Lindahl, of Portland said, “My colleagues on the CAC have been strong advocates not only for the livability of their own neighborhoods, but for the economic health and general well-being of the region as a whole.”

How we evaluate the alternatives

With a broad-reaching project like a new light rail line, the objectives and criteria for evaluating the alternatives must be comprehensive. The SDEIS studied how the alternatives perform using the following measures. *

| OBJECTIVES | MEASURES |
|---|--|
| <ul style="list-style-type: none"> • Provide high quality transit service | <ul style="list-style-type: none"> • Access • Ridership and ease of transfers • Travel times and schedule reliability |
| <ul style="list-style-type: none"> • Ensure effective transit system operations | <ul style="list-style-type: none"> • Operating effectiveness |
| <ul style="list-style-type: none"> • Maximize the ability of the transit network to accommodate future growth in travel demand | <ul style="list-style-type: none"> • Future expansion capability |
| <ul style="list-style-type: none"> • Minimize traffic congestion and traffic through neighborhoods | <ul style="list-style-type: none"> • Highway system use • Traffic activity through neighborhoods |
| <ul style="list-style-type: none"> • Promote desired land use patterns and development | <ul style="list-style-type: none"> • Support of activity centers like Oregon Museum of Science and Industry • Support of land use policies • Transit access to labor force and employment |
| <ul style="list-style-type: none"> • Provide for a fiscally stable and financially efficient transit system | <ul style="list-style-type: none"> • Cost-effectiveness • Financial feasibility |
| <ul style="list-style-type: none"> • Maximize the efficiency and environmental sensitivity of the design of the project | <ul style="list-style-type: none"> • Ecosystems, air quality, wetlands, parks, noise and vibration • Historic and cultural resources, visual impacts and displacements |

*Results are summarized in Chapter 5 of the SDEIS.

Summarizing the advantages and disadvantages of the project

In addition to the river crossing, alignment and station options evaluated, the SDEIS compares the benefits and impacts of building a new light rail line to not building one.

| NO-BUILD ALTERNATIVE | LIGHT RAIL ALTERNATIVE |
|--|---|
| <p>Advantages</p> <ul style="list-style-type: none"> • No impacts to the natural environment due to construction. • No community impacts such as displacement or noise and vibration. <p>Disadvantages</p> <ul style="list-style-type: none"> • Would not provide light rail service to the corridor. • Would not construct a new transit bridge across the Willamette River, which would improve bus, light rail and streetcar connections. <p>Other things to know</p> <ul style="list-style-type: none"> • From Lake Road, the transit travel time (which includes waiting, walking and transfers) is 42 minutes to Portland State University and 56 minutes to South Waterfront. | <p>Advantages</p> <ul style="list-style-type: none"> • More than 22,000 households and almost 89,000 employees within walking distance of a light rail station. • Between 1,475 and 2,600 additional park and ride spaces. • Up to 24,400 additional light rail rides each weekday. • Up to 59 percent reduction in transit travel time. • Short-term addition of 10,000 to 12,000 construction jobs in the region resulting in \$490 million of economic activity. • Reduction in peak hour congestion on the highway system. • Number of people using transit for work trips to downtown Portland grows by as much as 24 percent. <p>Disadvantages*</p> <ul style="list-style-type: none"> • Up to 62 potential full acquisitions. • Impacts to up to 4 historic resources and up to 6 existing and 2 planned parks. • Impacts to one fish-bearing river and 6 streams. • Noise and vibration impacts. <p>Other things to know</p> <ul style="list-style-type: none"> • Saves 15 minutes in transit travel time to Portland State University and 32 minutes to South Waterfront. • Would cost between \$1.25 and 1.4 billion to build (in year of construction dollars, 2013). • Would add between \$5.5 million and \$6.6 million in operating costs. |

*Mitigation planning in process.

River crossing options

Choosing the location for a new bridge

A new bridge across the Willamette River will carry pedestrians, bicycles, buses, streetcar and the new MAX line. It will be an important and unique addition to the region's family of bridges. The recent growth in the South Waterfront area creates an increasing need for transit further south than the original river crossing location, last studied in 1998 and adopted in 2003. The SDEIS studies four alternative bridge locations with an east landing at SE Sherman or SE Caruthers streets and a west landing at SW Meade or SW Porter streets in South Waterfront.

The four options have similar benefits and impacts. They contribute equally to the percentage of people using transit, have very similar travel times and traffic impacts to nearby roadways. They also access the same activity centers on either side of the bridge, places like the Oregon Museum of Science and Industry and Oregon Health Science University. The difference in cost to build and operate the four options is relatively minimal.

River crossings studied in the project

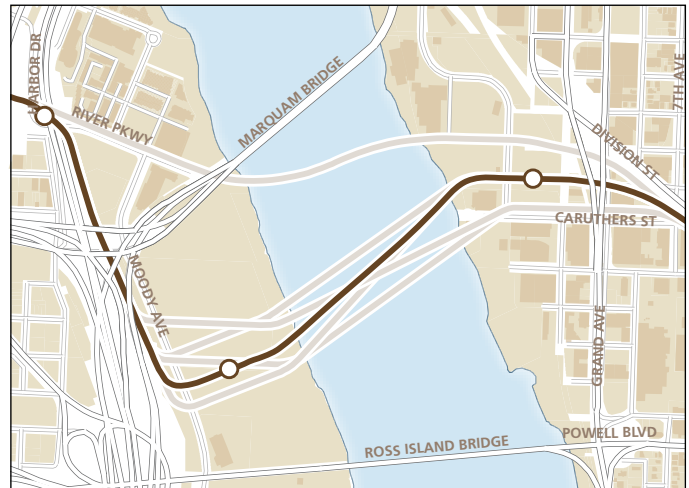


Willamette River Crossing Partnership

Portland Mayor Tom Potter and City Commissioner Sam Adams assembled a group of property owners and neighborhood representatives from both sides of the river to study possible locations for the new bridge. Called the Willamette River Crossing Partnership and chaired by Portland's former mayor Vera Katz, this group reviewed the benefits and impacts of each river crossing location and shared their unique perspectives.

In May, the group recommended a refinement of the Porter-Sherman crossing. The adjustment would serve Oregon Museum of Science and Industry while complementing Oregon Health and Science University, the Greenway and South Waterfront area master planning and providing a short walk distance to the tram. Their recommendation includes suggestions to inform future work on bridge structure and design, street network, open space and land uses. The project's Steering Committee could recommend this option for further study.

River crossing recommended by the Willamette River Partnership Committee



Differences between the new Willamette River crossing options and the 2003 Locally Preferred Alternative (LPA)

While the four new river crossing options share many similarities, there are a few key differences between them and the 2003 LPA river crossing that has a western landing at River Place:

- **Residents and employees served by light rail:** The new crossing options would serve almost 3,000 more residents and 4,000+ more employees than the 2003 LPA.
- **Light rail ridership:** The four newer crossing options would add between 1,200 and 1,400 light rail trips a day between downtown Portland and Milwaukie over the 2003 LPA.
- **Travel time:** The 2003 LPA would be one to two minutes faster, but the four crossing options would reduce travel time to South Waterfront for people on transit by five minutes.
- **Nearby uses:** The 2003 alternative would have fewer impacts to businesses on the east side, but the new crossing options would have fewer noise impacts and would impact one less park.

Different routes and end points to consider

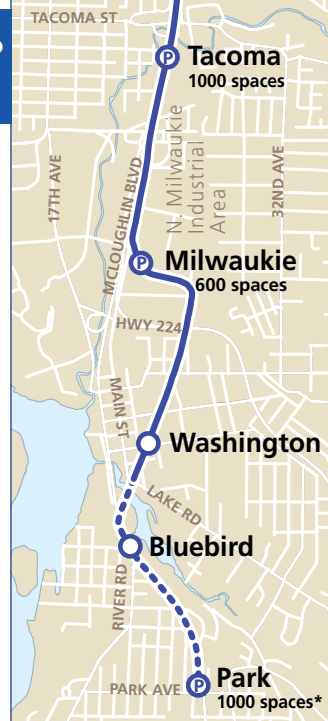
2003 LPA – terminus at Lake Road

MAP
A



2003 LPA – terminus at Park Avenue

MAP
B



Tillamook – terminus at Park Avenue

MAP
C



How far should we extend the line?

The line could terminate at Lake Road in Milwaukie or extend to Park Avenue in Oak Grove, an unincorporated community in Clackamas County. The two terminus choices have different benefits.

Benefits of the Lake Road terminus: See map A

- Requires 6 to 7 fewer full acquisitions.
- Impacts 2 fewer planned parks.
- Results in fewer noise and vibration impacts.
- Costs \$99 to \$124 million less to construct.
- Costs \$1 million less annually to operate.

Benefits of the Park Avenue terminus:

See maps B and C

- Increases the number of people using alternate forms of transportation to get to downtown Portland.
- Adds 1 or 2 more light rail stations.
- Puts a light rail station within a 1/2 mile walk for 1,100 to 1,600 more households.
- Reaches more commuters in North Clackamas County and maximizes park and ride opportunities by providing 800 to 1,100 more spaces.
- Increases light rail ridership by 2,300 to 3,100 rides each day.

The environmental analysis identified a need for additional park and ride spaces along the alignment. A traffic sensitivity analysis indicates it is likely feasible to include 1,250 spaces at SE Tacoma Street and 1,200 spaces at Park Avenue.

Which route should MAX take through the North Milwaukie industrial area?

South of the Tacoma station, the route could either follow the 2003 Locally Preferred Alternative on Main Street or the Tillamook Branch railroad through the North Milwaukie industrial area. Each route presents unique challenges and opportunities. The following compares these routes extending to Park Avenue.

Benefits of the 2003 Locally Preferred Alternative on Main Street: See map B

- Provides 600 parking spaces with a park and ride at Milwaukie/Southgate.
- Facilitates access to light rail for employees of the industrial area.
- Offers walking access to a light rail station to 500 more households and 1,600 more employees.
- Increases transit ridership by 800 trips each day.
- Results in fewer impacts to the freight railroad.
- Reduces the need for an extension to Park Avenue, which would reduce cost.

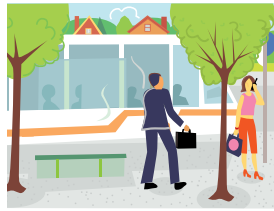
Benefits of the Tillamook Branch option: See map C

- Requires fewer acquisitions or displacements of businesses in the industrial area.
- Results in fewer impacts to traffic and freight access for businesses in the industrial area.
- Reduces light rail travel time by one minute.
- Costs \$25.6 million less to construct.
- Avoids impacting the historic ODOT property on McLoughlin Boulevard.

Station options that will serve the community

What makes a great station community?

By design, our region is made up of individual neighborhoods and communities, each with its own distinct character. Some neighborhoods are a piece of the big city where people live in high-rise towers and greet each other as they pick up their mail or take the elevator; other neighborhoods feel like small towns where people congregate on sunny weekends for the farmers market or the kids' soccer game.



The Portland-Milwaukie Light Rail Project is an opportunity to connect these different neighborhoods while respecting what makes each place special. Through a variety of workshops, meetings and open houses in Southeast Portland, Milwaukie and Oak Grove, we asked community members about the areas near and around stations.

Portland station choices

At two station workshops in Fall 2007 approximately 80 participants wrote on maps to illustrate their ideas for station areas including development and redevelopment, bike and pedestrian connections and areas where crossings may be challenging. At the two open houses that followed, about 60 participants reviewed and confirmed ideas provided in the workshops and provided comments on how the ideas might come to fruition.

Ideas for station areas included things like:

- Improving existing pedestrian and bicycle connections within and to the neighborhood and adding new ones
- Providing adequate parking near stations and or signage or other tools to limit parking in neighborhoods
- Preserving the character of neighborhoods and making stations reflect the unique quality of nearby neighborhoods
- Completing mitigation to limit noise impacts
- Exploring, along with local jurisdictions, concerns about impacts of truck traffic

Public input during the comment period will inform the decision to include – or not include these stations – in the selected alignment. Beyond that, some of the ideas —like station design details and mitigating traffic, noise and parking impacts — will be addressed during the Final Environmental Impact Statement (FEIS) which is expected to begin Fall or Winter 2008.

Other ideas, such as rezoning land for transit-oriented development, will not be included in the project because they fall under the jurisdiction of the City of Portland. The project teamed with and shared results of this community dialog with the city and with all project partners.

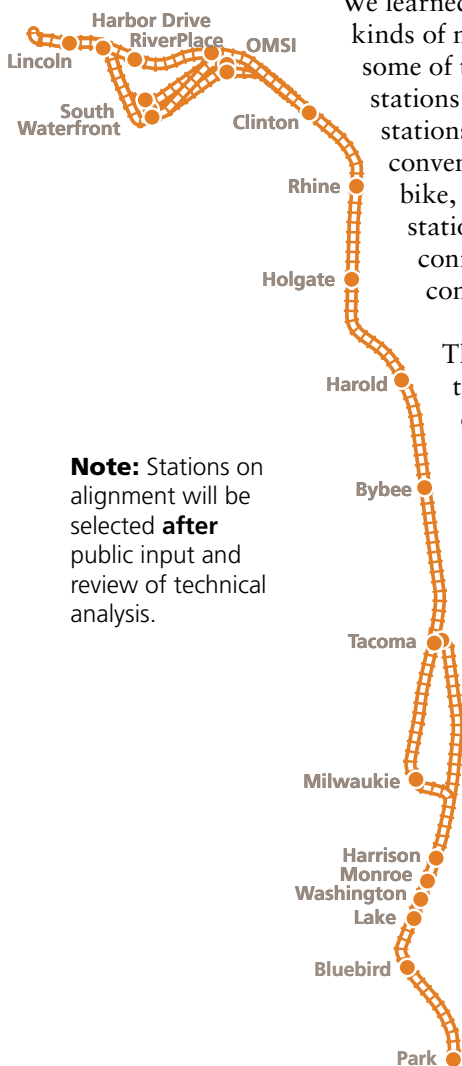
Harold Station

The project could include a station at SE Harold Street. This station was not part of the 2003 Locally Preferred Alternative, but had been discussed in past processes and was suggested for analysis by community members from the surrounding area.

The community has expressed strong support for a SE Harold Street station. The station would support local land use plans, which call for higher density development in the station area. However, the SE Harold Street station would increase capital costs by \$6.4 million and add about one minute in travel time for anyone traveling past the station. And, even with a \$6-8 million pedestrian bridge to connect Reed College and neighborhoods to the east, it would add few riders to the system.

We learned that people from all kinds of neighborhoods want some of the same things for stations in their neighborhoods – stations that people can access conveniently and safely on foot, bike, bus or by car. They want stations that are visible and connected to the surrounding community.

There are differences, though. In some communities, people envision their stations as catalysts for new development and opportunities to help create a place where people will want to go – whether to catch MAX or to grab lunch with a friend. In other communities, people want the station to blend into the existing neighborhood. Our region's planning process allows for both these types of stations and everything in between – it allows stations to match the vision of community members.



Note: Stations on alignment will be selected **after** public input and review of technical analysis.

Milwaukie and Oak Grove station choices

There are four station choices in downtown Milwaukie and one at Bluebird Street south of downtown. One or two downtown stations at Harrison, Monroe, Washington and/or Lake could be combined in different ways with a potential Bluebird station just south of downtown. Each combination comes with its own opportunities and challenges.

Meetings were held in Milwaukie to share information about, and discuss, station choices.

- Approximately 100 people attended a station workshop in March. Participants asked questions about ridership, redevelopment, safety and security, and traffic impacts and shared their preferences for station locations.
- The City of Milwaukie hosted a follow-up meeting for people to rank station locations in relation to the terminus. In June, the Milwaukie City Council will recommend Milwaukie stations to the Steering Committee.



Meetings were also held in Oak Grove.

• Approximately 130 people attended a station workshop in March. The community dialog highlighted interests in safety, redevelopment and light rail compatibility with trails and the existing neighborhood character.

- Oak Lodge Community Planning Organization hosted a follow-up meeting. Some questioned the need for the project. Others emphasized opportunities for senior communities to access transit and suggested integrating Metro's Nature in Neighborhood program into station design.

Other considerations

Safety and Security Task Force

Planning for safety and security on and around light rail is essential. The Safety and Security Task Force was created to ensure that public concerns about safety were reflected in this process. They identified concerns and brainstormed possible design ideas and policies to address them, things that give us insight for this light rail project and for current MAX operations. A number of these suggestions are already used by TriMet.

- Review and use best practices, especially Crime Prevention through Environmental Design.
- Improve use of closed circuit TV at station platforms.
- Increase TriMet or other authoritative presence on trains and at stations.
- Design park and rides to be safe and secure for people and property.
- Improve coordination with local first responders.
- Design light rail system to promote safe interaction between light rail trains, cars, bicycles and pedestrians, especially near schools.
- Create inviting, safe platforms and station areas.



PRESORTED
FIRST CLASS MAIL
US POSTAGE PAID
PORTLAND, OR
PERMIT NO. 2358



600 NE Grand Ave.
Portland, OR 97232
www.oregonmetro.gov/southcorridor

Contact information

City of Milwaukie
Grady Wheeler, 503-786-7503

City of Oregon City
Nancy Kraushaar, 503-496-1545

City of Portland
Mauricio LeClerc, 503-823-7808

Clackamas County
Ellen Rogalin, 503-353-4274

Multnomah County
Ken Born, 503-998-3043 x 29397

TriMet
Claudia Steinberg, 503-962-2154

Oregon Department of Transportation
Ralph Drewfs, 503-731-3359

Metro
Dana Lucero, 503-797-1755

Project website:
www.oregonmetro.gov/southcorridor

Upcoming events

Public comment period
May 9 to
noon on June 23

Public hearing
Monday, June 9
5:30 - 8:30 p.m.

Metro Regional Center
Council Chambers
600 NE Grand Ave., Portland

Farmers markets

Wednesday, May 14
4:30 to 7:30 p.m.
Moreland farmers market
SE Bybee/14th, Eastmoreland

Saturday, May 17
9 a.m. to 2 p.m.
Oregon City farmers market
2051 Kaen Rd, Oregon City

Sunday, May 18
9:30 to 2 p.m.
Milwaukie farmers market
Main St. across from City Hall,
Milwaukie

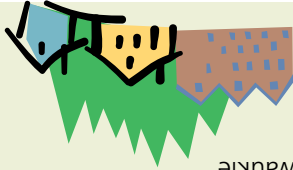
Open houses

Wednesday, May 21
6 to 8 p.m.
Cleveland High School
3400 SE 26th Ave., Portland

Thursday, May 22
6 to 8 p.m.
Marriott Residence Inn
Broadway Room
2115 SW River Parkway
Portland

Tuesday, May 27
6 to 8 p.m.
Putnam High School cafeteria
4950 SE Roethe Rd.
Oak Grove

Wednesday, May 28
6 to 8 p.m.
Milwaukie High School commons
11300 SE 23rd St.
Milwaukie



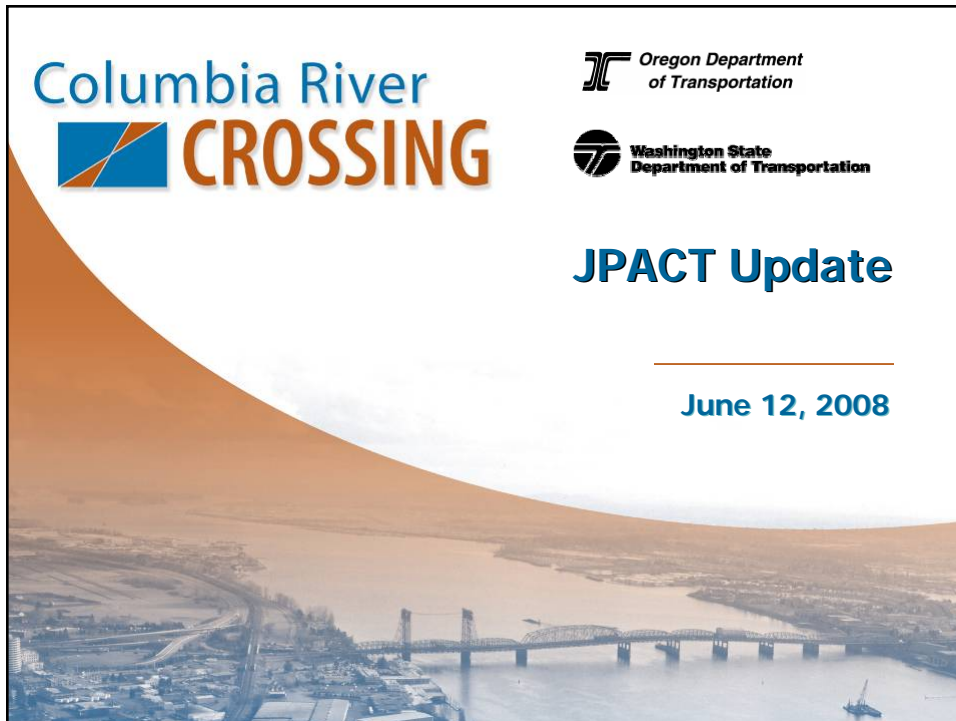
Columbia River CROSSING

 Oregon Department
of Transportation

 Washington State
Department of Transportation

JPACT Update

June 12, 2008



Today's Briefing

- Project Status
- Alternatives in the DEIS
- LPA Decision Process

Columbia River
 CROSSING

Project Status

- DEIS published by FTA and FHWA on May 2nd
- Currently in 60-day public comment period
- Locally Preferred Alternative (LPA) decision process will begin with Task Force recommendation on June 24th.

Project Addresses Six Problems on I-5



- **Congestion**
Travel demand exceeds capacity
- **Public transit**
Service is limited by congestion
- **Freight**
Mobility through the area is impaired
- **Safety**
Crash rates are too high
- **Bicyclists and pedestrians**
Facilities and connections are inadequate
- **Earthquake safety**
Bridges don't meet current seismic standards

Alternatives for Draft Environmental Impact Statement

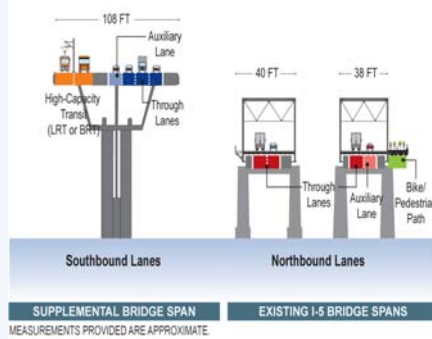
1. No build
2. Replacement bridge with bus rapid transit
3. Replacement bridge with light rail
4. Supplemental bridge with bus rapid transit
5. Supplemental bridge with light rail

All “build” alternatives include interchange, freight, and pedestrian/bicycle improvements between SR-500 and Delta Park.



Bridge Choice - Supplemental

Number of Lanes and Traffic Types on Bridges



New bridge for southbound traffic

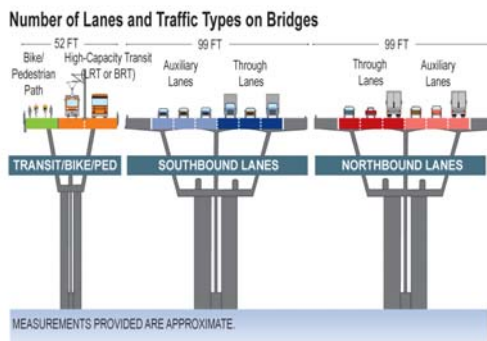
- Immediately downstream (west) of Interstate Bridge
- Three through lanes and one auxiliary lane
- Dedicated lanes for transit
- High enough for most boats
- Low enough to minimize impacts to airspace

Existing bridges re-striped for northbound traffic

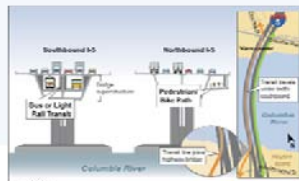
- three through lanes and one auxiliary lane
- widen existing bicycle/pedestrian path
- Retrofit for earthquake safety



Bridge Choice - Replacement



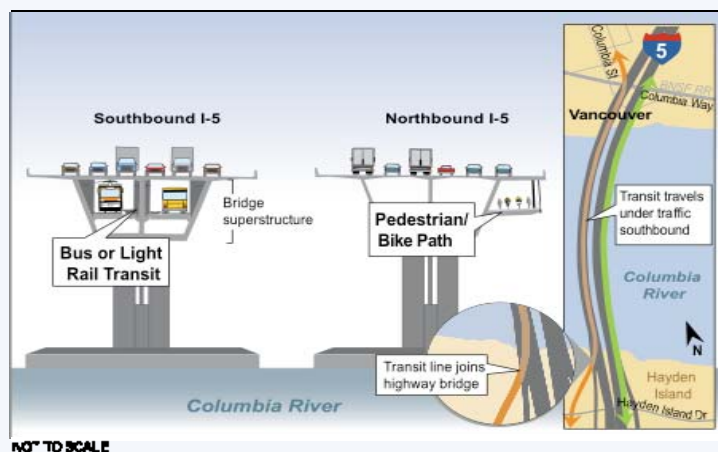
- New structure immediately downstream (west) of existing bridge
- Three through lanes and two or three auxiliary lanes in each direction
- Separate, new structure with dedicated lanes for transit, bicycles and pedestrians
- High enough for most boats and low enough to minimize impacts to airspace



Columbia River
CROSSING

The project is also analyzing a Stacked Transit/Highway replacement bridge design option.

Bridge Choice – Replacement Stacked Transit / Highway Bridge (“Transit in a Box”)

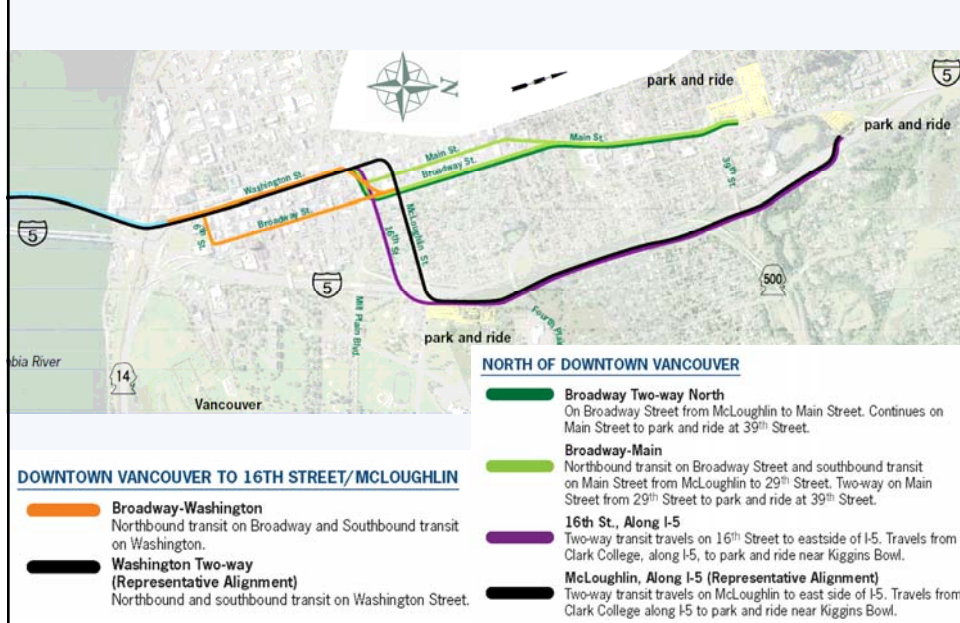


Columbia River
CROSSING

High Capacity Transit Alignments, Portland



High Capacity Transit Alignments, Vancouver



Cost and Funding

- **Cost estimate: \$3.1 to 4.2 billion***

Total I-5 highway related costs

- Replacement bridge \$2.67 to \$3.09 billion
- Supplemental bridge \$2.51 to \$2.88 billion

High capacity transit**

- Bus rapid transit \$0.46 to \$0.99 billion
- Light rail \$0.53 to \$1.17 billion

- **Potential funding sources**

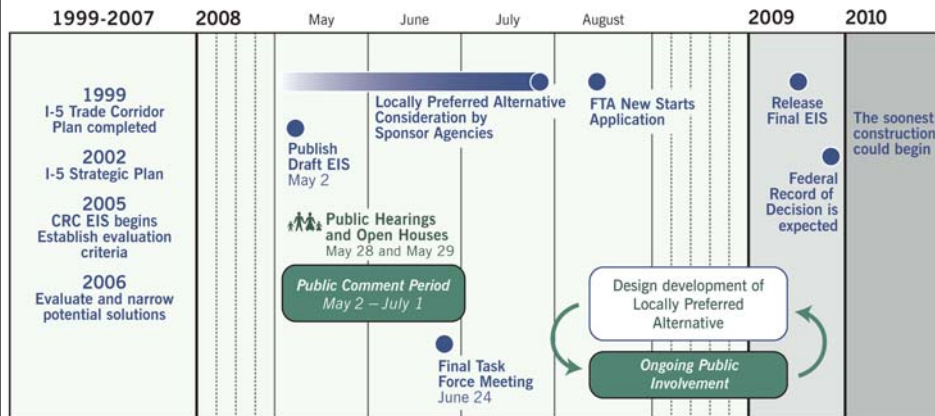
- Federal – FTA and FHWA
- State of Oregon
- State of Washington
- Tolling
- Regional and local



*In year of expenditure dollars, expected to be 2010-2017; operating and maintenance costs not included. Costs shown in 10 to 90 percent probability range.

**Includes all possible alignments and lengths, including possible short and long segments being studied for Vancouver.

Project Schedule



Metro Decision Process

- TPAC Review of LPA June 27th
- JPACT LPA Recommendation July 10th
- Metro Council LPA Decision July 17th



Next Steps and Choosing a Locally Preferred Alternative

Key dates:

- June 24 Columbia River Crossing Task Force proposes LPA
- July 1 Draft EIS Comment period ends

Public agencies vote on LPA:

- July 7 City of Vancouver
- July 8 C-TRAN
- July 9 City of Portland
- July 9 TriMet
- July 10 J-PACT
- July 17 Metro
- July 22 SW Wash. Regional Transportation Council



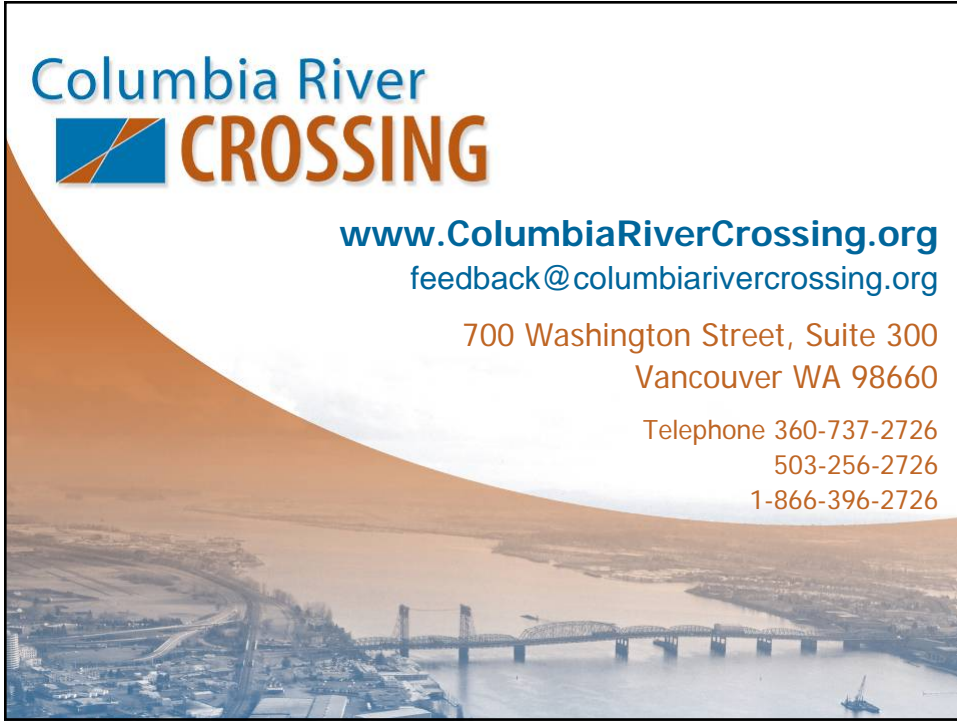
Columbia River **CROSSING**

www.ColumbiaRiverCrossing.org

feedback@columbiarivercrossing.org

700 Washington Street, Suite 300
Vancouver WA 98660

Telephone 360-737-2726
503-256-2726
1-866-396-2726



Materials following this page were distributed at the meeting.

A G E N D A

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232-2736
TEL 503-797-1916 | FAX 503-797-1930



METRO

REVISED

| | | |
|-----------------|--|---|
| MEETING: | JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION | |
| DATE: | June 12, 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. | ANNOUNCEMENTS |
| | | * Oregon Transportation Commission Earmark Policy Jason Tell |
| 7:50 AM | 6. | CONSENT AGENDA Rex Burkholder, Chair |
| | 6.1 | * Consideration of the JPACT minutes for April 25, 2008 and May 2, 2008 |
| | 6.2 | * Resolution No. 08-3952, For the Purpose of Amending the 2008-09 unified Planning Work Program and the 2008-11 Metropolitan Transportation Improvement Program to Allocate Intelligent Transportation System Program Funds to the PORTAL Achieved Data User Services Project |
| | 7. | ACTION ITEMS |
| 7:50 AM | 7.1 | * Resolution No. 08-3956, For the Purpose of Endorsing Regional Priorities for State Transportation Funding Legislation – <u>ACTION REQUESTED</u> Andy Shaw |
| | 8. | INFORMATION ITEMS |
| 8:15 AM | 8.1A | * Performance-based Growth Management – <u>INFORMATION</u> Carl Hosticka |
| 8:20 AM | 8.1B | * RTP Performance Measures – <u>DISCUSSION & PRELIMINARY DIRECTION</u> Deena Platman |
| 8:30 AM | 8.2 | * Portland – Milwaukie Light Rail Locally Preferred Alternative – <u>INFORMATION</u> – Action scheduled for July 10 th Bridget Wieghart |
| 8:40 AM | 8.3 | * Columbia River Crossing Locally Preferred Alternative – <u>INFORMATION</u> – Action scheduled for July 10 th Ross Roberts |
| 8:50 AM | 8.4 | # TriMet 2009 Transit Investment Plan – <u>INFORMATION</u> Fred Hansen |
| 9:00 AM | 9. | 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: kelsey.newell@oregonmetro.gov
To check on closure or cancellations during inclement weather please call 503-797-1700.

June 2, 2008

TO: David Bragdon, Presiding Officer, Metro
Tom Potter, Mayor, City of Portland
Sam Adams, Mayor-elect, City of Portland
Lynn Peterson, Chair, Clackamas County Commission
Ted Wheeler, Chair, Multnomah County Commission
Tom Brian, Chair, Washington County Commission

FROM: Joe Cortright

RE: Financial Risks of the Columbia River Crossing

As proposed, the Columbia River Crossing poses serious risks to the future financial integrity of transportation finance in the Portland-Vancouver region.

It is a project that poses substantial risk to the region's taxpayers, travelers, local governments and future development. The work done to date on the project provides only the most cursory examination of these risks, makes implausibly optimistic assumptions, and does little to quantify the consequences of error. The region's elected official and citizens should insist on real due diligence on these risks—preferably from parties completely independent of the project—before endorsing any alternative. It may well be that you decide that this project is worth the risks that it would require, but it is incumbent on you to insist that a full and fair estimation of these risks be undertaken before the region commits itself to this extraordinarily costly project.

CRC would be the most expensive public works project

The proposed Columbia River Crossing would be the most expensive public works project in the region's history. At more than \$4 billion, it represents a cost of more than \$8,000 for each four-person household in the region. It is hard to understate the size of this project: it is roughly the equivalent of 80 OHSU trams. It is 20 times bigger than the largest highway construction project currently underway in Oregon (the Highway 20 rebuild between Newport and Corvallis). Just the estimated cost of demolishing the existing I-5 bridges--\$155 million—would be a bigger expenditure than any other current project underway in Oregon.

Proponents don't have financing plans worked out

To date, the financial plan for the project remains speculative. The Draft Environmental Impact Statement lists a number of different possible sources of funding, but all of them would require further legislative action by the Washington and Oregon Legislatures, by Congress, and tax increases or resource allocations by C-Tran and Tri-Met. A portion of the cost may have to be borne by city and county taxpayers as well.

The vagueness and ambiguity of the financing plans should give the region's leaders pause. What if federal earmarks are not forthcoming? Who then will make up the

difference? How likely is it that Washington State will provide \$750 million or more for a project in Clark County, when it has a huge backlog of un-funded projects in the Puget Sound area? Keep in mind that Clark County represents less than 10 percent of Washington's population, so that funding a \$750 million project in Clark County would imply that the state would have to come up with a \$12 billion dollar transportation financing package statewide to generate this much here. And voters in King County just last November decisively defeated a proposed tax increase for roads and transit. It is questionable whether Washington has the interest or political will to fund such a project in Clark County: the 2008 Legislature budgeted the state's transportation funds through 2023, allocating \$1.9 billion to the SR 520 floating bridge and \$2.4 billion to the Alaska Way Viaduct, but nothing beyond preparation of the DEIS for the Columbia River Crossing.¹

What CRC proponents are suggesting is that the region agree to the project and then look for funding. If any of the expected contributions from other parties fall short: federal grants, toll bond revenues, Washington State appropriations, then the project will require an even larger contribution from Oregon transportation funds. This is a clear risk to the region's ability to finance other projects.

Federal support is likely to be very small

The CRC financing plan assumes a massive and now politically implausible level of federal earmarks. The CRC has blithely asserted that the region can expect \$400 to \$600 million in federal earmarks for this project, and that because of its alleged unique characteristics that these monies will be over and above federal revenue that the region could expect to get in the future.

But this level of earmarks dwarfs what has gone to any single project. And the climate for earmarks has changed dramatically from the last transportation bill in 2005. One presidential candidate has made a flat ban on earmarks a central part of his platform. Senator Patty Murray—chair of the transportation subcommittee of the appropriations committee—has warned against expecting big funding for this project.²

While the public statements of the CRC imply that this project can expect some special funding, the reality is quite different. The "Corridors of the Future" program which CRC implies is a special category, is defined to include freeway mileage that carries fully one-

¹ Senate Transportation Committee, Proposed 2008 Transportation Budget, February 25, 2008, http://leap.leg.wa.gov/leap/budget/detail/2008/st2008_Highlights0225.pdf, viewed May 20, 2008.

² Hamilton, Don, "Building a new bridge: Fed funding for I-5 bridge faces hurdles" *The Columbian*, January 15, 2008. "But two issues could complicate federal funding for the proposed project. First is the congressional discussion over earmarks, special allocations for special projects. Murray, a Democrat, said the earmark process has been abused and must be controlled, but that earmarks often provide a crucial boost for small local projects with limited resources. Even more important, the federal highway trust fund is projected to run out of money sometime in mid-2009."

third of the nation's traffic, and is an bureaucratically created program of the Bush Administration, funded at a total of \$66.2 million nationally.³

No one should make the mistake of assuming that the CRC will not compete for virtually every federal dollar flowing into the region. In the text of the DEIS, the CRC makes it clear that every other source of federal money flowing to Oregon and Washington for transportation are fair game for the CRC, including monies dedicated to preservation and maintenance of the highway system (DEIS, Section 4-3).

The CRC would require an unprecedented level of debt

Historically, with a few exceptions, transportation investments have been financed on a "pay-as-you-go" basis. This prudent policy means that each year, policy makers have that year's full revenues available to spend on the transportation system. This project is different. Based on CRC reports, we estimate that 80% or more of the cost of the highway bridge will be borrowed over three decades. Borrowing, especially in these large amounts creates new kinds of risk for the funding of our transportation system. If there are shortfalls from projected levels for any of the sources of funds—tolls, future taxes, and federal grants—then bond holders will have first call on transportation revenues. The CRC toll bond funding scenario assumes a backup pledge of state gas tax revenues to toll bond holders. The Columbia River Crossing DEIS includes plans to issue bonds against anticipated future federal grants--Grant Anticipation Revenue Vehicle (GARVEE) bonds (Draft Environmental Impact Statement, page 4-11).

Hundreds of millions in transportation revenue will be used to pay interest

Missing from the project's financial analysis is a comprehensive accounting of how much the region will pay in interest payments over the next three decades so that we can have this giant new bridge—designed not for today's traffic levels, but for the estimated demand of 2030—today. The amount will be measured in hundreds of millions of dollars—transportation revenue that cannot be used for transportation projects over the next 20 to 30 years because it will be needed to retire the debt the region will incur to finance this one project.

Because the financial plan for the project is so sketchy, it is impossible to determine the exact amount of interest payments that will be required. As a rough rule of thumb, however, the region would pay roughly \$60 million in interest per year (in the initial years of borrowing) for each \$1 billion financed (assuming an interest rate of 6%). Borrowing \$3 billion for the project would necessitate annual interest payments of \$180 million in the initial years of the project—money that would not be available for other transportation projects.

³ U.S. Department of Transportation, Corridors of the Future Fact Sheet, <http://www.dot.gov/affairs/CORRIDORS%20OF%20THE%20FUTURE%20FACT%20SHEET.htm>, Viewed May 20, 2008.

Borrowing against future toll revenues is risky

Bonding against toll revenues carries two distinct sets of risks for transportation finance in the region: leverage risk and repayment risk. Leverage risk has to do with the amount of bridge construction costs that can be paid for with bonds: how much money will Wall Street agree to lend against the promise of repayment from future toll revenues? Repayment risk is related to the reliability of projections about future toll revenues. If toll revenues fall short of projections, state and local governments must make up the difference from other sources of public revenue.

The CRC estimates that it can leverage the \$2.50 tolls it plans to charge into as much as \$1.35 billion in bond revenues. The leverage risk is that bond rating agencies and bond issuers will take a much more critical and conservative view of how much debt they are willing to issue against the predicted stream of toll revenues over the next 30 years. Bad experiences with a long series of toll bond issuances over the past decade have made the financial community very skeptical of these forecasts. And independent review of these forecasts by the Transportation Research Board, an arm of the National Academies, found consistent "optimism bias."⁴ Rating agencies are particular prone to heavily discount forecasted revenues for projects that involve tolling a single facility (like one bridge), and projects for which there is no demonstrated history of toll revenues. The CRC stacks up poorly on these measures.

The repayment risk stems from the possibility that actual toll revenues over the next thirty or forty years will be less than CRC's forecasts. If they are, then Oregon and Washington will have to make up the shortfall from other sources of revenue. The higher end estimates of potential revenue from tolling assume that both Oregon and Washington make pledges of other revenues to assure repayment of toll-backed bonds. (Draft Environmental Impact Statement, page 4-22). The legal requirement to pay back bondholders puts the CRC first in line for all pledged revenues for a period of several decades.

CRC has not prepared a realistic, investment grade traffic and revenue forecast

In addition, you should know that bond rating agencies and the financial community will insist that we pay for an independent "investment grade" traffic and revenue forecast **before** issuing bonds for this project. Having been burned in the past by the overly optimistic, promotional forecasts developed for other toll-financed projects, Wall Street requires that an investment grade forecast be undertaken which makes much more conservative assumptions about traffic levels, toll diversion, future growth, operating costs, and other factors. The CRC has not undertaken such an analysis.⁵ This fact alone

⁴ Kriger, D., S. Shiu, et al. (2006). Estimating Toll Road Demand and Revenue. Washington, DC, Transportation Research Board of the National Academies 364.

⁵ Mr. Jay Lyman, Columbia River Crossing consultant, Testimony to the Portland Planning Commission, April 8, 2008.

should be extremely alarming to the region's decision-makers: Why should the public sector, which will ultimately pay the full cost of this project, make a decision based on less evidence than the banker's who will merely lend us the money for its construction?

Bond financing requirements may limit future transit development

Bond financing also carries one additional risk. Bond holders and bond rating agencies view local transportation improvements in the same general area as a toll-financed project as a financial risk. In some cases in the past, public agencies have invested in transportation improvements that have had the effect of reducing traffic on tolled facilities, reducing their revenue, and endangering bond repayment. In short, bond holders do not want to see effective competition for their projects—they prefer a monopoly situation. Therefore, bond rating agencies frequently seek assurances from state and local governments that they will not make additional investments in transportation capacity that would have the potential to reduce traffic on the tolled facility. What this means in the case of CRC is unclear. It may mean that bond holders would seek assurances that the region would not make additional improvements to the I-205 crossing—currently slated to be un-tolled—and could well mean that the bond holders would want assurance that the development of mass transit in Clark County would be limited (a large light rail system connected to Portland might be viewed as endangering future highway bridge toll revenues). Because the CRC has not commissioned an investment grade toll study or sought project review from bond rating agencies we don't know what conditions may be imposed as the region seeks bond funding for the project. In the absence of agreement to such conditions, the bond rating agencies are likely to downgrade the amount of money they are willing to allow to be borrowed against future project revenues (leverage risk) meaning that the region will have to come up with more money from other local sources.

CRC has not allowed its financial analysis to be independently examined

One might be more confident of the quality of CRC's analyses if they had made them public. But despite having completed this work in November of 2007, and having been in receipt of a public records request for "all reports relating to toll projections" in February 2008, the CRC as of May 20, 2008, had not released any of the details of these projections.⁶ (The report "Toll Financial Capacity Analysis Results, November 2007" is referenced on Page 4-22 of the Draft Environmental Impact Statement, but appears nowhere on the CRC website or in its CD of technical papers).

Transportation revenue is declining; CRC will require tax increases

It is apparent that current system of paying for roads and bridges is failing. Driving is down. Gasoline sales are down. Gas tax revenues are down. The federal highway trust

⁶ Letter from Tonja Gleason, Public Disclosure Coordinator, Columbia River Crossing Project, February 26, 2008, to Joe Cortright.

fund is essentially bankrupt, expenditures regularly exceed revenues, and the fund balance is slated to go negative in 2009. The problem is so dire that Congress has been rescinding funding for approved projects.

At the state level, the seriousness of the revenue shortfall is now becoming apparent. Relying on ODOT forecasts, CRC assumes that the volume of gas sales (not their dollar amount) will rise at 1.5% per year over the next 30 years.⁷ ODOT's revenue projection staff were caught by surprise by the drop in gasoline demand triggered by the more than doubling of gas prices in the past few years.⁸ Rather than increasing, net gas tax revenues available for transportation projects are actually declining, and sharply: the City of Portland saw its net disbursements of shared state road user fees decline by 5.6% over the last year.⁹

We face a multi-billion dollar transportation investment deficit, even without the CRC

And the revenue shortfall comes at a time when we know that the preservation and maintenance of the existing transportation system is woefully underfunded. Late last year the Metro Council officially concluded that even if the Oregon state gas tax was increased by one cent every year for the foreseeable future and even if the vehicle registration fee was increased by \$15 every eight years, the region faced a \$7 billion shortfall for various proposed transportation projects in the region – a total that does not include funding for the CRC.

ODOT officials are telling Portland area local governments that they don't have any money for additional projects between now and 2013 and face a \$7.5 million annual cut in modernization funding starting in 2014.¹⁰

⁷ CRC Transportation Planning/Traffic Engineering Team and CRC Financial/Economic Specialists, Subject: Review of Columbia River Crossing-Economic Analysis Memorandum by Joe Cortright dated February 13, 2008, March 3, 2008, page 4: "These revenues are estimated by ODOT to grow on average at about 1.5% per year."

⁸ Dylan Rivera, The Oregonian, May 11, 2008, page A1. The decision by Oregon motorists to persistently drive less, even during periods of job growth, has baffled state economists, especially those who keep the figures on total vehicle miles traveled.

"I don't really have a bulletproof explanation for why it hasn't been growing," said Dave Kavanaugh, chief economist for the Oregon Department of Transportation.

⁹ Oregon Dept Of Transportation Fund Apportionments, Receipt distribution to cities for fiscal year 2007-2008, and fiscal year 2006-2007.
http://www.oregon.gov/ODOT/CS/FS/docs/HwyRev_apport/apport_fy08.pdf, viewed May 20, 2008. For the 11 months ended May 2008, total revenues were \$22.8 million compared with \$24.1 million for the 11 months ended May 2007.

¹⁰ Swan, D. (2008). ODOT to Tigard: No dough on the horizon. Tigard Times. Tigard.(May 22) 1. Tigard asked ODOT for \$1.75 million in help for a project to improve the intersection of Highway 99 and

There are substantial risks that construction cost estimates will be exceeded

At the same time, construction and repair costs are rising. The rise in oil prices is driving up costs of asphalt. The falling dollar, coupled with strong economic growth in China and India have driven up the prices of steel and concrete.

ODOT's track record in estimating the cost of mega-projects is less than stellar. At the time of the draft Environmental Impact Statement on the proposed Newberg-Dundee bypass (2003), total project costs were confidently estimated at \$222 million. Just 2 years later, after additional, more precise engineering analyses, the cost had ballooned 40%, to more than \$311 million.¹¹ ODOT's largest current project—and the biggest highway project it has undertaken since completing I-205—a 7-mile long rebuild of U.S. Highway 20 between Corvallis and Newport, is more than 33 percent over budget.¹² One doesn't have to imagine a cost overrun of more than 200% (as in the case of the OHSU tram) to realize that mis-estimating this project would have devastating consequences for the region. If the current estimates are off by as little as 25%, this would add fully a billion dollars to the project cost.

Cost overruns would jeopardize future transportation investments

It has not been determined who would be responsible for cost overruns.¹³ But it is clear that the additional resources would be diverted from other transportation priorities in the state and the region. And once ODOT and WSDOT have embarked on bridge construction, it is clear that completing this project—regardless of its final cost—would be the highest priority use of any available revenues.

And this project will not achieve its key objectives

Greenburg Road. ODOT's response: "All of our money is spent between now and 2013 without any additional funding," Tell [Jason Tell, Region 1 manager for ODOT] told the council.

¹¹ Oregon Department of Transportation, Newberg-Dundee Transportation Improvement Project Location (Tier 1) Final Environmental Impact Statement, June 2005, page 2-18.

(http://www.newbergdundeebypass.org/environmentalanalysis/NDTIP_FEIS_04_Chapter%202.pdf)

¹² Tobias, Lori, "Corvallis-Newport project revived," *The Oregonian*, May 20, 2008, page B2. Cable, Kendall S. "Agreement reached regarding Highway 20 project," *Newport News Times*, May 21, 2008. The original design-build contract was valued at \$129.9 million. ODOT recently agreed to add \$47 million to the contractor's compensation. ODOT's costs for planning and project management are in addition to these amounts.

¹³ Draft Environmental Impact Statement, page 4-42: "WSDOT, ODOT, C-TRAN, TriMet, and possibly the Cities of Vancouver and Portland, must prepare agreements on roles and responsibilities for project development, construction, and capital funding that address such issues as project management and decision-making, capital cost sharing, how potential cost-overruns are managed, and contracting procedures."

The proponents of the bridge are trading on the palpable frustration with peak hour congestion on the existing bridge, and the assumption that casual observers harbor that spending \$4 billion will surely make traffic flow smoothly. Disappointingly, however, according to the project's own estimates, building the new bridge will actually increase AM travel times between Vancouver and Portland compared to the No-Build. Let me repeat—according to the CRC estimates it will take **longer** to travel from SR 500 to Columbia Boulevard with the \$4 billion replacement bridge than under the No-Build alternative.¹⁴

There are good reasons to believe that CRC traffic models are simply wrong about the projects effects on future congestion. The project asserts that the replacement bridge will increase peak hour travel capacity (2 hours) from 55,000 vehicles (no-build) to 75,000 (replacement). Apparently, none of the additional peak hour traffic, according to CRC will travel south of the I-5/I-405 intersection (near the Fremont Bridge. All of the additional users (essentially Clark County residents commuting to Oregon jobs) will leave the freeway in North Portland.

Effective, lower cost alternatives have been systematically ignored

There is little reason to undertake this level of risk to deal with the congestion problems in the I-5 corridor. All of the projects important objectives can be accomplished at much lower cost, with a prudent, pay-as-you-go approach.

- Toll the existing facility to fund seismic retrofits (The cost of retrofits is roughly the same as the budgeted cost--\$155 million--of demolishing the existing bridges)
- Address navigation problems by putting a lift span in the railroad bridge as recommended by the Coast Guard
- Modify selected I-5 on-ramps to improve safety and reduce congestion
- Extend light rail to Hayden Island
- Ultimately, as revenues and demand permit, build a light rail/bike/pedestrian bridge following the contour of the existing lift spans and extend light rail to Clark County

We know this approach will address the congestion problems in the corridor because the CRC's own analysis show that the only components of the project that reduce congestion are transit and tolling—additional capacity, by itself, simply generates more traffic.

As proposed, the Columbia River Crossing poses serious risks to the future financial integrity of transportation finance in the Portland-Vancouver region. Until these fundamental questions are addressed, the region should not move forward with this project.

¹⁴ According to the CRC Traffic Technical Report, Exhibit 7-13, Travel time from SR-500 to Columbia Boulevard will increase from 16 minutes today, to 19 minutes under the No-Build to 22 minutes under the Replacement Bridge.

Healthy Environment

| Metro Council Goals | Metro Council Objectives | Performance Measurement Project / Program Budget | Performance-Based Growth Management | "Final Draft" Regional Transportation Plan |
|---|--|--|---|--|
| <p>Environmental Health: The Region's wildlife and people thrive in a healthy urban ecosystem</p> | <p>2.1 Natural areas are large enough, have the appropriate balance of species and are interconnected with other natural areas so that normal ecological processes are maintained</p> <p>2.2 Our community is inspired to create a better future for wildlife and the environment</p> <p>2.3 The region's waste stream is reduced, recovered and returned to productive use, and the remainder has a minimal impact on the environment</p> <p>2.6 Residents' health is enhanced by exceptionally clean air and water</p> | <p>Goal 3: Protect and enhance the region's natural assets</p> <p>Goal 4: Reduce and manage waste generated and disposed</p> | <p>Outcome 4: The region is a leader in minimizing contributions to global warming</p> <p>Outcome 5: Current and future generations enjoy clean air, clean water and healthy ecosystems</p> | <p>Goal 6: Promote environmental stewardship</p> <p>Obj 6.1 - Natural Environment Obj 6.2 - Clean Air Obj 6.3 - Water Quality and Quantity</p> <p>Goal 7: Enhance human health Obj 7.1 - Active Living Obj 7.2 - Pollution Impacts</p> |

Vital Economy

| Metro Council Goals | Metro Council Objectives | Performance Measurement Project / Program Budget | Performance-Based Growth Management | "Final Draft" Regional Transportation Plan |
|---|--|---|--|---|
| <p>Economic Vitality: Residents and businesses benefit from a strong and equitable regional economy</p> | <p>3.3 Access to jobs, services, centers and industrial areas is efficient</p> <p>3.2 The region's economy provides a plentiful supply of family wage jobs</p> <p>3.4 Stable, affordable sources of energy, combined with energy conservation, position the region for sustained economic growth and stability</p> <p>3.5 The region attracts tourists and businesses from throughout the US and the world</p> <p>3.6 The region's rural economy thrives because of its proximity to the urban area, not in spite of the urban area.</p> | <p>Goal 5: Provide efficient access to jobs, services, centers and industrial areas</p> <p>Goal 6: Support the development of a sustainable economy</p> | <p>Outcome 3: People have safe and reliable transportation choices that enhance their quality of life</p> <p>Outcome 2: Current and future residents benefit from the region's sustained economic competitiveness and prosperity</p> | <p>Goal 3: Expand Transportation Choices</p> <ul style="list-style-type: none"> Obj 3.1 - Travel Choices Obj 3.2 - Reduce Vehicle Miles traveled Obj 3.3 - Equitable Access and Barrier Free Transportation Obj 3.4 - Shipping Choices <p>Goal 2: Sustain economic competitiveness and prosperity</p> <ul style="list-style-type: none"> Obj 2.1 - Reliable and Efficient Travel and Market Area Access Obj 2.2 - Regional Passenger Connectivity Obj 2.3 - Regional Mobility Obj 2.4 - Freight Reliability Obj 2.5 - Job Retention and Creation |

Smart Government

| Metro Council Goals | Metro Council Objectives | Performance Measurement Project / Program Budget | Performance-Based Growth Management | "Final Draft" Regional Transportation Plan |
|--|---|---|---|--|
| <p>Smart Government: Metro leads a fiscally sound, efficient and congruent system of governance where public services are funded appropriately and provided by the most suitable units of government</p> | <p>4.1 Regional needs are supported by appropriate regional funding mechanisms</p> <p>4.2 Public services are available and equitable</p> <p>4.3 Metro provides services that fit its distinct competency or regional scope</p> <p>4.4 There is no duplication of public services among jurisdictions</p> <p>4.5 The tax system and investments in the region are congruent with region 2040 fundamentals and do not have inadvertent effects on land use</p> <p>4.6 Metro encourages and supports the leadership of other organizations and governments that serve the interests of the region's residents</p> | | <p>Outcome 6: The benefits and burdens of growth and change are distributed equitably</p> | <p>Goal 9: Ensure Fiscal Stewardship Obj 9.1 - Asset Management Obj 9.2 - Maximize Return on Public Investment Obj 9.3 - Stable and Innovated Funding</p> <p>Goal 8: Ensure equity Obj 8.1 - Environmental Justice Obj 8.2 - Coordinated Human Services Transportation Needs</p> <p>Goal 10: Deliver accountability Obj 10.1 - Meaningful Input Opportunities Obj 10.2 - Coordination and Cooperation</p> <p>Goal 4: Emphasize effective and efficient management of the transportation system Obj 4.1 - System Management Obj 4.2 - Demand Management Obj 4.3 - Value Pricing</p> |

Responsible Operations

| Metro Council Goals | Metro Council Objectives | Performance Measurement Project / Program Budget | Performance-Based Growth Management | "Final Draft" Regional Transportation Plan |
|---|---|--|-------------------------------------|--|
| <p>Critical Success Factors</p> <ol style="list-style-type: none"> 1. Metro sets a standard of fiscal prudence, integrity, transparency and accountability that is emulated by others 2. The Metro Council is recognized for solving regional problems and leading regional initiatives 3. Constituents and customers are valued 4. Metro's business and operations processes are efficient and serve program objectives 5. Metro's workforce is exceptionally competent, productive and motivated | <p>2.4 Metro is a model for sustainable business practices</p> <p>Multiple specific critical success factor objectives</p> | <p>Goal 7: Use best business practices to operate Metro sustainably, effectively and efficiently</p> | | |

www.oregonmetro.gov/rtp



A New Look at Transportation

Linking Transportation to Land Use, the Economy and the Environment

2035 RTP Performance Measurement Framework

June 12, 2008 | JPACT Briefing



2035 Regional Transportation Plan Update A New Approach

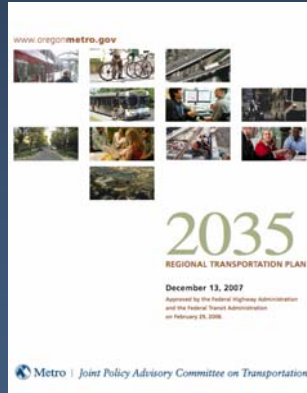
- **Outcomes** tied to public values
- **Connecting people and places** to create great communities and economic vitality
- **Strategic, innovative solutions** addressing issues and fiscal realities
- Transportation **performance and quality of life** effects - land use, economy, environment, access to nature and equity



2035 Regional Transportation Plan Update Regional Transportation Plan

Goals for planning and investing in our transportation system

1. Vibrant Communities and Efficient Urban Form
2. Economic Competitiveness and Prosperity
3. Transportation Choices
4. Effective and Efficient Management of the Transportation System
5. Safety and Security
6. Environmental Stewardship
7. Human Health
8. Equity
9. Fiscal Stewardship
10. Accountability



2035 RTP
State
Component
Work
Program
Element

2035 Regional Transportation Plan Investment Scenarios Analysis

- Tests RTP policies
- Tests proposed performance measures
- Frames financial trade-offs
- Sets the stage for System Development

"Cause and Effect" Transportation Investment Scenarios Analysis

| | |
|---|--|
| 2035 No-Build | 2035 Base Case |
| Concept A <i>Focus on Multi-Modal System Connectivity</i> | Concept B <i>Focus on HCT and Regional Transit Service</i> |
| Concept C <i>Focus on Throughways</i> | Concept D <i>Focus on System Management</i> |



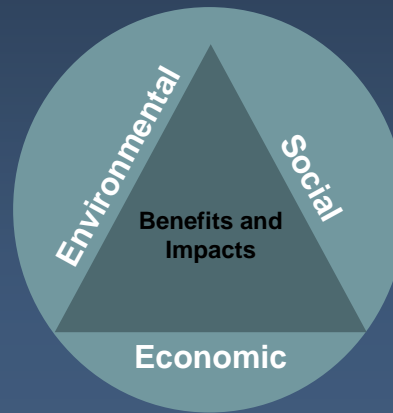
2035 RTP
State
Component
Work
Program
Element



RTP Performance Measures Work Group

Outcomes-Based Evaluation Framework

- Continues LOS evolution
- Links to other regional efforts
- Tells us about scenarios concepts
- Establishes on-going monitoring system



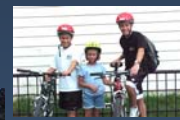
2035 RTP
State
Component



RTP Performance Measures Work Group

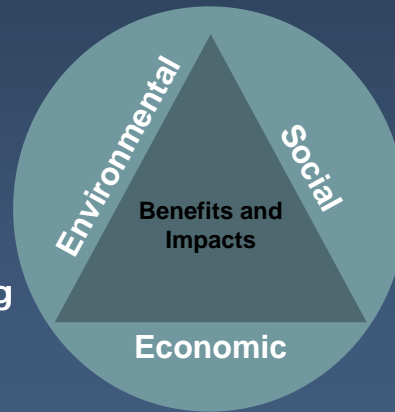
Work Group Process To Date

- Responds to federal component unresolved issues
- MTAC and TPAC members
- Developed guiding principles
- Narrowed list from from 100 to 26 measures



RTP Performance Measures Work Group Framework Purpose

- Tell a story
- Frame choices
- Identify needs
- Evaluate investments
- Better informed decision-making
- **Not** a project-level analysis



RTP Performance Measures Work Group Framework Elements

| | RTP Goals | Geographic Extent | Application |
|----------------------|-----------------------|---|--|
| Performance Measures | 2035 RTP Goals 1 – 10 | <input type="checkbox"/> Regionwide <input type="checkbox"/> Mobility Corridor <input type="checkbox"/> Community | <input type="checkbox"/> Baseline Evaluation <input type="checkbox"/> System Evaluation <input type="checkbox"/> Plan Monitoring |



2035 RTP
State
Component

RTP Performance Measures Work Group System Evaluation Matrix

- Relates performance measures to RTP Goals (*Attachment B*) - a starting point
- Focused on “predictive” measures



2035 RTP
State
Component

RTP Performance Measures Work Group Future Steps

- Scenarios work to inform further narrowing & refinements
- Identify “observed” data measures
- Adapt to project selection
- Develop benchmarks and targets
- Establish monitoring system



2035 RTP
State
Component

2035 Regional Transportation Plan Update Upcoming RTP Milestones

June '08

- Council/JPACT/MPAC direction on performance measures framework

Oct.-Nov. '08

- Scenarios results released
- Joint Council/JPACT/MPAC meetings to discuss results

Dec. '08

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



METRO
PEOPLE PLACES
OPEN SPACES

2035 RTP
State
Component

2035 Regional Transportation Plan Update Today's Discussion

- Provide feedback on performance measurement framework elements
- Are these the right set of measures to test?




METRO
PEOPLE PLACES
OPEN SPACES



 **Portland – Milwaukie**
LIGHT RAIL PROJECT

**Joint Policy Advisory Committee on
Transportation**
May 30, 2008



Today's Briefing:

- Project overview and update
- Willamette River Crossing Partnership recommendation
- Southern alignment and terminus options and issues
- Locally Preferred Alternative (LPA) decision process

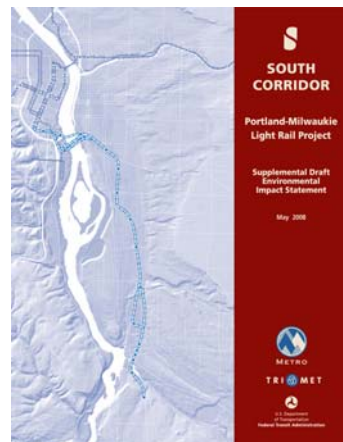
Project Overview

- 6.4 – 7.2 mile light rail line
- New Willamette River bridge for transit, pedestrians and bikes
- 10-13 stations
- 2-4 park-and-ride facilities



Project Update

- *Supplemental Draft Environmental Impact Statement (SDEIS)* published May 9
- 45-day public comment period ends June 23
- Locally Preferred Alternative process commencing





Ridership

- 22,000-26,000 daily riders
- 9,000-12,000 new system riders
- 22,000 households and 89,000 jobs within ½ mile



Transportation Performance

Compared to 2030 No-Build

Mode share increase Milwaukie to CBD

- All trips 9%-17%
13%-24%
- Work trips

VMT reduction 46,400-
(All day, region-wide) 69,200

Vehicle Hours of Delay 300-460
reduced
(Peak, region-wide)



Environmental Impacts

- Up to 2 existing and 2 planned parks with direct impacts
- Up to 62 potential full acquisitions
- Threatened and Endangered fish in 3 or 5 rivers
- 3 or 4 historic resources
- Up to 25 noise and 38 vibration impacts



Section 4(f) and de minimus

- Two existing and two planned recreational resources with potential impacts:
 - South Waterfront Park (.06 acre)
 - Eastmoreland Golf Course (>.02 acre)
 - Robert Kronberg Park (>.1 acre)
 - Trolley Trail (~.87 acre)
- Preliminary findings indicate a *de minimus* impact for these resources

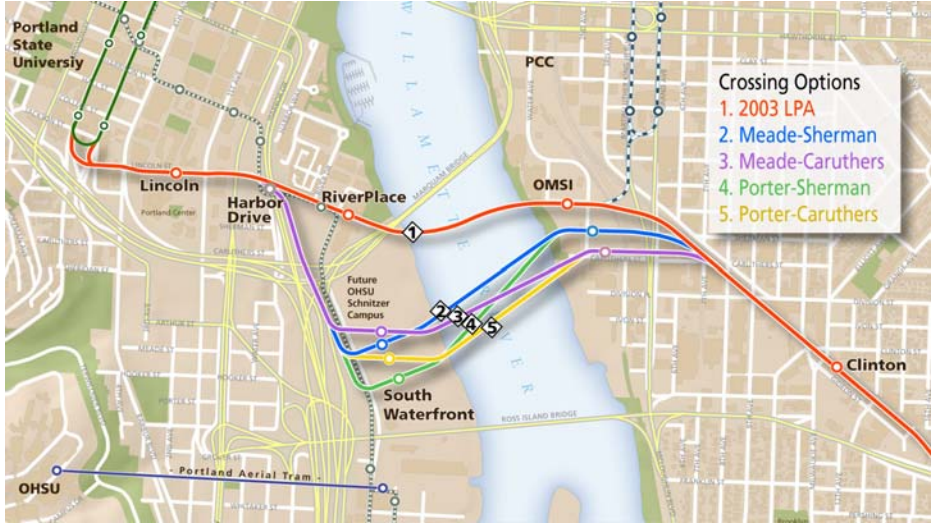


Public Comment Period

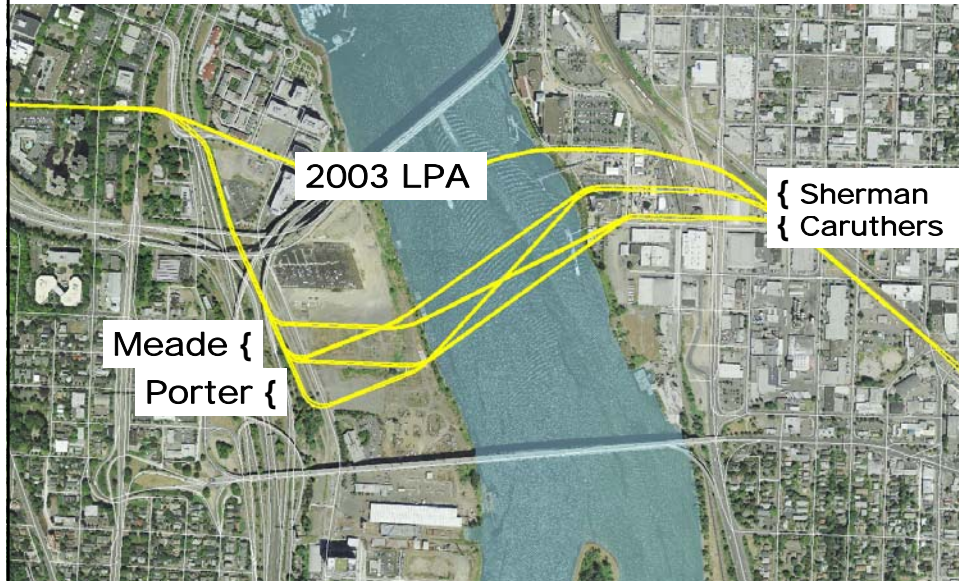
- Four open houses in May
- Steering Committee public hearing June 9
- CAC and Steering Committee recommendations on LPA late June



Willamette River Crossing

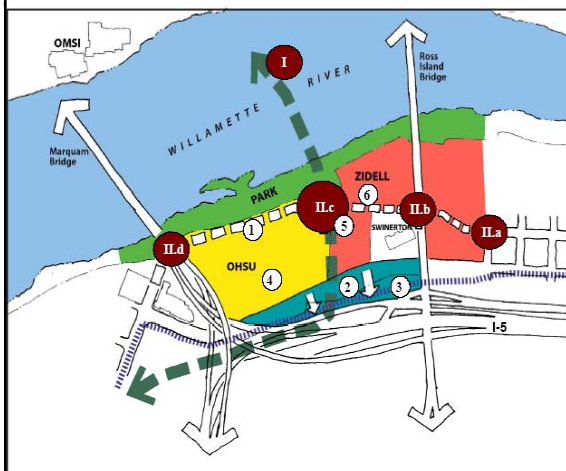


River Crossing Update



Willamette River Partnership

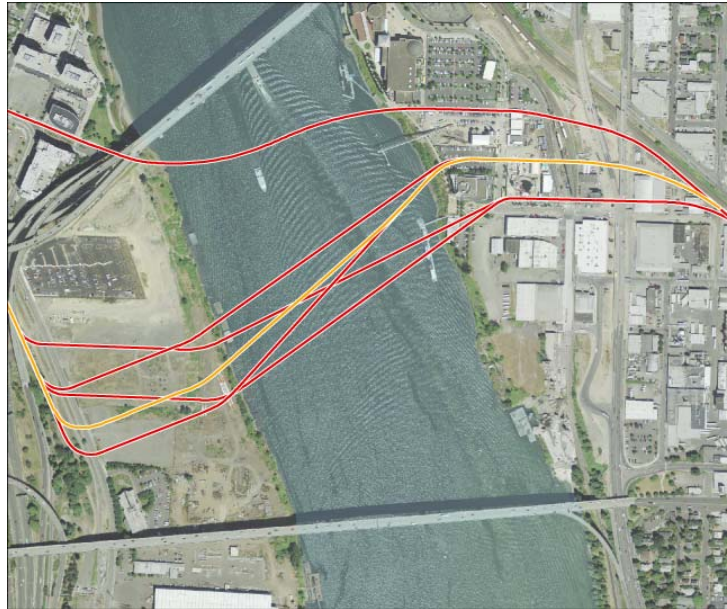
City of Portland led a process of local landowners and city bureaus to recommend a preferred crossing alignment



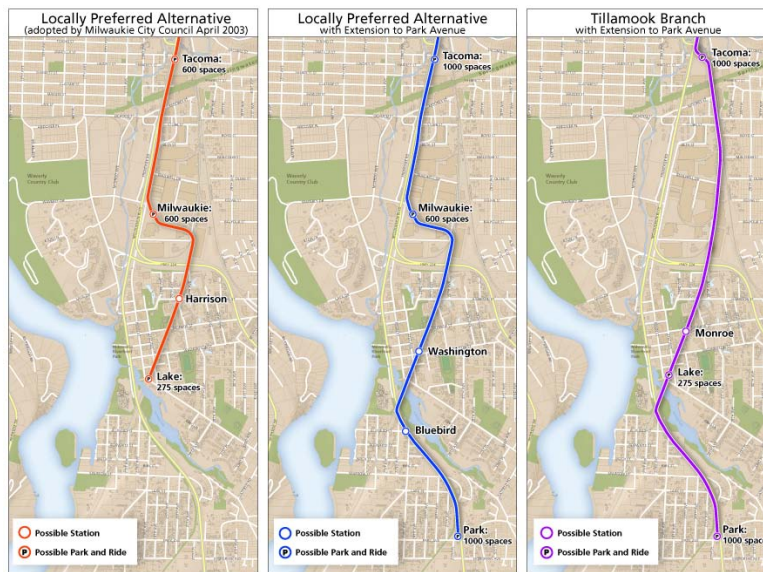
Key issues

- SW Bond alignment
- SW Moody alignment
- Streetcar
- Elevations
- Zidell property

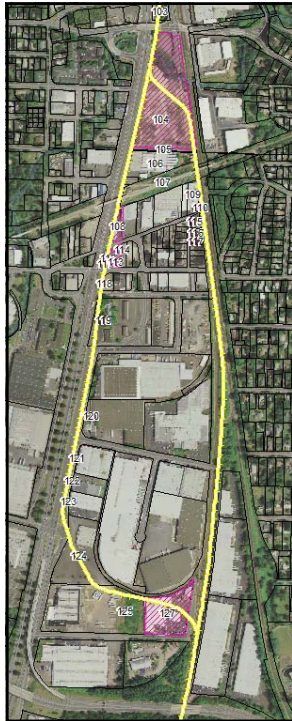
Refined River Crossing Alignment



Milwaukie and Southern Terminus Options



Total Park and Ride: 1475 **Total Park and Ride: 2600** **Total Park and Ride: 2275**
 These station and park and ride locations are being studied in a SDEIS. The final alternative could incorporate elements from several options.



Milwaukie North Industrial

- 2003 LPA alignment along McLoughlin:
 - More property impacts
 - Traffic and parking impacts
 - 600 park-and-ride spaces
 - Increases ridership by 800 trips daily
- Tillamook Options:
 - No park-and-ride option
 - Fewer acquisitions and displacements
 - Fewer impacts to freight and businesses
 - Avoids impact to historic ODOT property
 - Reduces travel time by 1 minute
 - Costs \$25.6 M less



Lake Road terminus

- Positives:
 - 6-7 few acquisitions
 - 2 fewer planned parks
 - Fewer noise and vibration impacts
 - \$99M to \$124M less to construct
- Challenges:
 - Loss of park-and-ride, especially with Tillamook alignment
 - Lower ridership
 - Terminus infrastructure in downtown Milwaukie



Park Avenue terminus

- Positives:
 - Increases ridership by 2300 to 3100
 - Adds 1 or 2 stations and up to 1200 park-and-ride spaces
 - Captures commuter south of town center
 - Avoids impacts to Milwaukie
 - Local jurisdiction support
- Challenges:
 - Impacts to Kronberg Park and the Trolley Trail
 - Increased costs
 - Crossing McLoughlin Boulevard

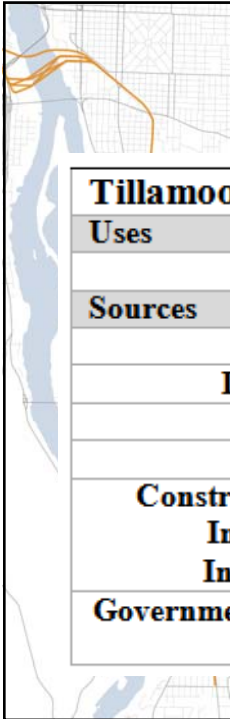
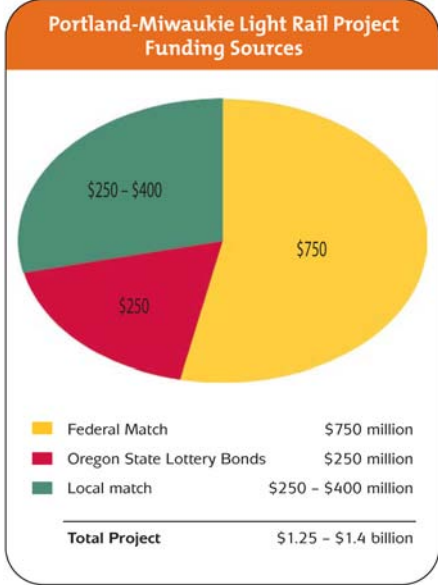


Steering Committee Direction

- Reduce cost to Park
- Explore Tillamook alignment with Lake terminus
- Continue work with North Industrial owners



Overall finance strategy



Funding Scenarios

| Tillamook to Park | A | B |
|--|-------------|-------------|
| Uses | | |
| Cost | \$ 1,333.00 | \$ 1,333.00 |
| Sources | | |
| New Starts | \$ 750.00 | \$ 799.80 |
| Lottery Bonds | \$ 250.00 | \$ 250.00 |
| MTIP | \$ 72.00 | \$ 72.00 |
| In-Kind | \$ 10.00 | \$ 30.00 |
| Construction-Period Interest Paid + Interest Earned | \$ 80.00 | \$ 100.00 |
| Governments/ Property Owners | \$ 171.00 | \$ 81.20 |

Locally Preferred Alternative Process

| | |
|----------------------|---------|
| CAC | June 12 |
| Steering Committee | June 26 |
| TPAC | June 27 |
| JPACT | July 10 |
| Metro Council action | July 24 |

