

 **Metro** | *Agenda*

Meeting: **RTO SUBCOMMITTEE OF TPAC**  
Date: **Wednesday, January 13, 2010**  
Time: **3:00 to 5:00 p.m.**  
Place: **Room 601, Metro, 600 NE Grand, Portland**

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**\*\*Please note – When weather conditions become severe, Subcommittee members should call 797-1700 for building closures, or late opening information.**

To join the meeting by phone, please contact Pamela Blackhorse in advance of the meeting at [Pamela.Blackhorse@oregonmetro.gov](mailto:Pamela.Blackhorse@oregonmetro.gov) or 503-797-1757. Pamela will call you from the meeting room to link you to the phone conference. Conference calls are limited to three people.

- 3:00 p.m. Call to order/declaration of a quorum/introductions
- 3:05 p.m. Meeting summary from December 2009 Meeting – Approval\* – Dan Kaempff, Metro
- 3:10 p.m. Citizen Communication
- 3:15 p.m. TSMO/TripCheck Data Portal – INFORMATIONAL – Glen Hammer, ODOT & Deena Platman, Metro
- 3:45 p.m. TriMet and SMART FY 2011 Work Plans – DISCUSSION – Adriana Britton, TriMet; Jen Massa, SMART
- 4:15 p.m. Regional Travel Options FY 2011 Budget/Workplan – ACTION REQUESTED – Dan Kaempff & Pam Peck, Metro\*
- 4:45 p.m. Program updates – all (time permitting)
- 5:00 p.m. Adjourn – Dan Kaempff, Metro

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\* Meeting materials will be available electronically prior to the meeting.



**RTO Subcommittee of TPAC**  
**Tuesday, December 8, 2009**  
**3:30 to 5:00 p.m.**  
**Metro Regional Center, Room 401**

**Committee Members Present:**

Dan Kaempff - Chair	Metro
Dan Bower	Portland Bureau of Transportation
Adriana Britton	TriMet
Jennifer Campos	City of Vancouver
Sandra Doubleday	City of Gresham
Susan Drake	DEQ
Adrian Esteban	Community Representative
Karen Frost	Westside Transportation Alliance
Derek Hofbauer	Community Representative
Gregg Leion	Washington County
Jen Massa (via phone conference)	City of Wilsonville SMART
Lori Mastrantonio-Meuser	Clackamas County
Carla Wood (via phone conference)	Oregon Department of Energy

**Committee Members Excused:**

Ken Burgstahler	WSDOT
Derek Hofbauer	Community Representative
Keith North	Community Representative
Alison Wiley	ODOT

**Metro Staff:**

Pamela Blackhorse	Metro
Pam Peck	Metro
Deena Platman	Metro
Caleb Winter	Metro

**Guests:**

Lynne Mutrie	Community Member
Chi Nguyen	VPSI
Audrey Shuffield	VPSI
Beth Wheeler	TriMet
Brad Windler	C-Tran

## I. CALL TO ORDER/DECLARATION OF A QUORUM/ MEETING SUMMARY FROM NOVEMBER 2009 MEETING

Chair Dan Kaempff, a Senior Transportation Planner for Metro, declared a quorum and called the meeting to order at 3:37 p.m. He asked if there were any changes to the meeting summary from November 4, 2009. Ms. Adriana Britton of TriMet asked for corrections to her name.

*Action taken:* Chair Kaempff asked if there were a motion to approve the November meeting summary. Ms. Karen Frost of Westside Transportation Alliance (WTA) moved to approve the meeting summary. Mr. Dan Bower of Portland Bureau of Transportation (PBOT) seconded the motion. The Subcommittee unanimously approved the November 4, 2009 meeting summary with the changes as stated above.

## II. CITIZEN COMMUNICATION

There were none.

## III. VANPOOL PROGRAM OPTIONS – 2010-2011

Chair Kaempff provided information on the Vanpool Program for fiscal year 2010/2011 and discussed the budget of \$182,700. He reviewed the options discussed at the November 4, 2009 Subcommittee meeting, stating that option one calls for modest growth and assumes the quarterly addition of four vans during the fiscal year based on the current Program growth rate and an annual cost of \$107,520. Option two would maintain the current fleet of 15 vans with no growth. Chair Kaempff suggested capping the fleet at 15 vans and working with a, “one in, one out” policy, which allows for new vans once old ones are terminated. He stated that option three, at its current incentive level covered 50 percent of van lease costs. Reduction in incentives could increase the number of vans in the program without increasing the budget, or they could continue to maintain the fleet at the current budget levels. He cautioned the Subcommittee that a reduction in incentives could cause vanpools to disband or not develop. However, with a reduction in incentives, the annual cost would by \$64,512 to \$73,728.

Chair Kaempff discussed the fourth option, which would be to disband the Vanpool Program and use the funds for a general rideshare incentive program based on ridership. As such, a portion of the funds not used for vanpool could be used for other programs. Additionally, Chair Kaempff stated that options one through three would allow for 5307 funding from the Federal Transportation Association (FTA), which would put money back into the Vanpool Program. Ms. Pamela Peck, a Marketing Manager for Metro pointed out that Metro, Wilsonville SMART, C-Tran and TriMet would have to be in agreement on an option in order for the Program to receive 5307 funds.

Chair Kaempff drew the Subcommittee’s attention to a letter of support from VPSI; one of the vanpool programs’s contracted providers, and pointed out the opportunity to gain 5307 funds to provide a local match based on farebox revenue. He stated that RTO could pay half of the Program funds using Congestion Mitigation and Air Quality (CMAQ) funds and use the farebox revenue as a local match. He pointed out that this would allow more staff time to be allotted to the Vanpool Program and would loosen up their Business Energy Tax Credit (BETC) funds for other projects.

The Subcommittee discussed the idea of a self-sustained Vanpool Program and asked if RTO grants where an option for vanpools, or whether Transportation Management Associations (TMA) would have to apply for a grant on behalf of a vanpool. They discussed how funds might be shifted for that purpose and questioned if the market was set up correctly for a Vanpool Program, or if Program was just not working for this area. Finally, they asked whether a cash incentive would increase vanpool participation and if 50 percent down was normal for a van lease.

Chair Kaempff acknowledged that a vanpool could potentially go through the RTO grant process for funding, but pointed out that incentive would not be made available to general carpoolers. Further, he pointed out that 50 percent down is what FTA allowed and that the RTO Program must provide a match. Finally, he pointed out that the Program was struggling with the reduction in the number of vans and stated that RTO currently paid an annual average of \$710 per vanpool rider.

The Subcommittee discussed how the budget would be affected if they didn't add two additional vans per option one, questioned what the process was for starting a vanpool, what the trend was for current vanpool applications and what the administrative costs were.

Ms. Peck stated that vanpool money not spent would be rolled over to other programs. Chair Kaempff pointed that, in addition to not having a hub-link for vanpools, it was difficult to continue the Program during the recession. Additionally, he stated that there must be a minimum of six riders per van to start a vanpool as well as a signed agreement between the leasing vendor and riders. Chair Kaempff also commented that vanpool applications had been growing steadily until spring 2009 when Metro lost half of the Vanpool Program as a result of C-Tran initiating a vanpool program.

Additionally, Ms. Peck pointed out that vanpools needed drivers and that the current vanpool contract added liability and lacked incentive to attract drivers. Additionally, she pointed out that vanpools were no longer a free service, which dropped incentive further. Ms. Peck acknowledged that new the regional rideshare software should make it easier to develop vanpools, but that costs would remain very high with only 6.7 people per van.

Further, Chair Kaempff pointed that that C-Tran vanpool riders had incentive to create vanpools by riding free for the first month, thus giving them the opportunity to try vanpooling at no cost. He stated that although vanpools saved approximately \$100 a month, it was difficult getting people to start a vanpool program with a shortage in public budget. He stressed the need to bring the vanpool vision back to the metro area and find a way to justify the cost. Finally, he stated that the current budget was tricky and could tie up funds that would normally roll over to another program. He is recommending option one with a reduction of \$100,000 in vanpool funds.

The Subcommittee suggested a brainstorming session for building a cost effective marketing effort at the next RTO marketing meeting and asked if there was a vanpool program for the Clackamas industrial area. Ms. Peck agreed with the Subcommittee on developing a marketing strategy for vanpools. Further, she responded that a vanpool had been authorized for Clackamas TMA some time ago, but that there has been little or no interest expressed by industrial companies and that there was too much flux in the industry due to layoffs.

Chair Kaempff stressed the need for the Subcommittee to make a decision on the Vanpool Program today, but conceded that they may need to make a final decision at the January 13, 2010 Subcommittee meeting. The Subcommittee stated that the Vanpool Program's current level of \$90,000 for incentives and \$40,000 for staff for a Program that only served 100 riders suggested a need for reprogramming, but not dropping the Program altogether. Chair Kaempff polled the Subcommittee and asked them what option they would like to utilize:

- Mr. Bower recommended combining options one and two and suggested that the RTO Program prioritize funding for programs such as parking cash out, van, or carpools. He also suggested combining options one and four, but pointed out that doing so would be dependent upon ODOT contributing \$175,000 to \$180,000 for a marketing program.
- Ms. Frost suggested using grant funds and personal incentives for a vanpool and recommended that RTO staff consider offering carpools where vans did not work.

- Ms. Lori Mastrantonio-Meuser of Clackamas County stated that she was leaning towards disbanding the Vanpool Program, but conceded to combining options one and two and would like to see a funds made available to vanpools through a grant.
- Ms. Sandra Doubleday of the City of Gresham suggested utilizing option one, but stated that she would like to see additional incentive go towards drivers since they are critical to the success of a vanpool. Chair Kaempff stated that RTO was budgeted over and above what was already allotted for the Vanpool Program and suggested going in as a partner in a grant program.
- Ms. Jennifer Campos of the City of Vancouver recommended option one in combination with incentives for drivers and the kickoff of the online rideshare program.
- Ms. Britton also recommended combining options one and two and incorporating changes that help reduce barriers for creating a vanpool. She suggested creating incentive by shortening the lease or marketing it as a 30-day lease, which would help reduce rider financial liability. Additionally, she felt that there was no need to add vans to the Program.
- Mr. Adrian Esteban suggested using option one and adding more funds for growth.
- Ms. Jen Massa of the City of Wilsonville SMART program agreed with the Subcommittee's suggestions.

Chair Kaempff acknowledged that the Subcommittee would like to keep the Vanpool Program and that there is a need for additional incentive for drivers.

Ms. Peck requested a January meeting to finalize the decision and adopt the RTO budget. She pointed out that TriMet had their 2010/2011 Scope of Work with them for review. She suggested that TriMet add \$40,000 to the Scope of Work and asked that they add the cost of transit coming out of Washington.

Comment [dk1]: ???

#### IV. REGIONAL TRAVEL OPTIONS FY 2011 BUDGET/WORK PLAN

Chair Kaempff provided a print out of the 2010/2011 RTO Work Plan. Ms. Peck asked the Subcommittee if there were any items that needed to be clarified in the Work plan and RTO budget. Chair Kaempff pointed out that they would need to add the upcoming phone survey to the budget and suggested that the Subcommittee take action on the budget and Work plan in early January 2010. The RTO FY 2010/2011 Budget and Work plan was tabled until January 13, 2010.

#### V. PROGRAM UPDATES

Chair Kaempff pointed out that RTO Subcommittee meetings were in conflict with Transportation System Management and Operations (TSMO) meetings and asked if the Subcommittee would be willing to change meeting times. The Subcommittee suggested moving the meeting time to 3 to 5 p.m.; meetings to remain on the second Wednesday of every other month starting January 2010.

#### Vi. ADJOURN

There being no further business Chair Kaempff adjourned the meeting at 5:00 p.m.

Meeting packet materials

<b>Document Type</b>	<b>Date</b>	<b>Description</b>	<b>Document Nbr.</b>
Agenda	120809	Agenda for December 8, 2009	120809-rto01
Summary	120809	Meeting summary, November 4, 2009	120809-rto02
Document	120809	FY 2011 Vanpool Program Options	120809-rto03
Document	120809	RTO Program FY 2010-2011 work plan	120809-rto04
Document	120809	TriMet 2010/2011 Budget, Scope of Work and Summary of Results	120809-rto05
Document	120809	SMART Options Employer and Community Outreach Plan FY 2010	120809-rto06

*Meeting summary respectfully submitted by*

*Pamela Blackhorse* \_\_\_\_\_

*Date:* \_\_\_\_\_

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Regional Travel Options Program  
**FY 2010-2011 work plan**

DRAFT: January 13, 2010



Metro | [www.oregonmetro.gov](http://www.oregonmetro.gov)

## **Background**

The Regional Travel Options (RTO) Program implements regional policy to reduce reliance on the automobile and promote alternatives to driving for all trips. The program emphasizes all alternative modes of travel and all trip purposes, reflecting policies in the Regional Transportation Plan.

This scope of work identifies the activities and tasks that will be carried out by Metro RTO staff to implement the Regional Travel Options 2008-2013 Strategic Plan in fiscal year 2010-2011. The strategic plan was developed by the RTO subcommittee of the Transportation Policy Alternatives Committee (TPAC) in 2007 and adopted by the Metro Council in March 2008. The strategic plan established the following program goals:

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

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

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

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

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

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

## **Key program objectives for fiscal year 2010-2011**

- Coordinate the regional collaborative marketing program and support implementation of ODOT Drive Less/Save More marketing campaign in the Portland metropolitan area.
- Administer RTO travel options, individualized marketing and Transportation Management Association (TMA) grants, and provide technical assistance to grant recipients.
- Update the process to determine RTO travel options grants that will begin July 2011.
- Coordinate multi-agency employer and commuter outreach activities and support partner collaboration.
- Work with partner organizations to implement a multi-state (Idaho, Oregon and Washington), on-line ridematching system, in the Portland region.
- Collaborate with partners to develop rideshare marketing and an incentive program.
- Collect, analyze and report data for each RTO program to ensure that funds are invested in the most cost effective ways.

## **Collaborative marketing**

The RTO Collaborative Marketing Program works to increase awareness and use of travel options and to reduce drive-alone trips. Metro's scope of work will focus on coordination of marketing activities carried out by all RTO partners to maximize the program's effectiveness and reach target audiences identified in the 2008-2013 RTO strategic plan. Partner coordination will



be carried through the Marketing and Outreach Working group, the development of a regional events calendar and a regional earned media and promotions calendar.

Metro RTO staff will continue to support implementation of the Drive Less/Save More Marketing Campaign in the Portland metropolitan area in coordination with ODOT to leverage the statewide campaign in the Portland region. RTO staff will participate in the development and implementation of earned media activities and campaign promotions that highlight RTO programs and will conduct direct outreach at up to eight community events selected in coordination with RTO partners. RTO staff will look for opportunities to collaborate with Metro's Sustainability Center to coordinate campaign outreach with other sustainable living marketing programs. In addition, Metro staff will also act as the liaison to the statewide effort and will disseminate campaign tools and information to RTO partners.

RTO staff will promote the benefits of bicycling and walking and to increase the use of these modes for transportation purposes. Activities in this area will include disseminating safety messages and information and promoting the use of regional trails for transportation purposes. RTO staff will coordinate activities in this area with staff from Metro's Long-Range Transportation Planning and Trails Planning work groups and the regional Intertwine Alliance. Marketing and promotions in this area will focus on Metro's Bike There! and Walk There! programs.

Pending award of federal Transportation Investment Generating Economic Recovery (TIGER) grant funds, RTO staff will assist in planning and promotion of four bicycle and pedestrian trails as part of Metro's Intertwine Initiative. These trail projects are located in Portland, Clackamas, East Multnomah and Clackamas counties, and Hillsboro. Metro RTO staff and partners will work specifically on developing strategies to inform the public and encourage use of these new facilities. Beyond these local projects, a regional marketing and outreach campaign coordinated with local programs will create awareness of the facility locations and the personal and community benefits of using the facilities for a variety of trip purposes, including commuting to work and school, shopping and errands, and exercise and recreation.

Metro RTO staff will implement marketing strategies for the regional Bike There! map and Walk There! guidebook, and will support distribution and sales of the products through Metro's web site, storefront and area retail outlets. Revenue from the map and guidebook sales will be used to support the development and printing of future editions. In addition, staff will distribute free copies of the Bike There! map to youth, low income and other underserved audiences. Flat, unfolded bike maps can be posted at work sites around the region. These maps will be available through RTO employer. Metro staff will also coordinate and provide staff support and marketing for up to ten Walk There! walking tours in partnership with RTO partners and local jurisdictions. Tour participants will receive free copies of the guidebook.

The Walk There! guidebook was developed by Metro with financial support from Kaiser Permanente. Metro and Kaiser Permanente are exploring the development of a pilot project to reach underserved audiences with the Walk There! program. This may include the development of additional walking routes in select communities, translation of some Walk There! routes and

descriptions into other languages, and a series of walking events offered in other languages. These activities are contingent upon grant funding from Kaiser Permanente.

Metro RTO program staff, augmented by contracted professional services, will carry out the following tasks:

- Support Marketing and Outreach Working Group for effective coordination and partner communication.
- Assist with implementation of ODOT's Drive Less/Save More campaign in the Portland metropolitan area, assist with development of earned media opportunities, disseminate campaign information to RTO partners and act as liaison to ODOT.
- Develop regional calendar of events and travel options promotions, coordinate presence of RTO partners and provide staff support for up to eight community events.
- Develop RTO collateral materials consistent with the Drive Less/Save More campaign, including fact sheets, brochures, web pages, and other collateral materials. (is this retail or wholesale)
- Provide oversight for Metro's regional Bike There! map program, implement map marketing strategies, oversee sales and distribution.
- Manage Metro's regional Walk There! program, implement marketing strategies, oversee sales and distribution, and support collaboration with local and regional partners related to the promotion of walking for short trips.
- Coordinate collaborative marketing activities with other Metro departments to leverage resources and further disseminate program messages.

#### **Key milestones for FY 09-10**

- September 09 – Earned media, events and promotions calendars for next quarter completed.
- December 09 – Earned media, events and promotions calendars for next quarter completed.
- March 10 – Earned media, events and promotions calendars for next quarter completed.
- June 10 – Earned media, events and promotions calendars for next quarter completed.

#### **Deliverables**

- RTO collateral materials (is this retail or wholesale)
- RTO events calendar
- RTO earned media and promotions calendar
- Quarterly progress reports

#### **Commuter services**

The 2008-2013 Regional Travel Options Strategic Plan calls for increased efforts to coordinate the outreach activities of partner's employer and commuter programs. The intended outcomes include avoiding duplication of effort, leveraging resources, and more strategic delivery of services to locations where the greatest impact can be attained.

Currently, the following partners carry out employer and commuter programs: Metro, Oregon Department of Environmental Quality (DEQ), TriMet, Wilsonville SMART, Vancouver

## Commuter Trip Reduction Program, Portland Transportation Options and Transportation Management Associations (TMAs).

A large portion of employer outreach is generated by the Employee Commute Options (ECO) program. The DEQ is responsible for oversight and implementation of the ECO program (the ECO rules, OAR 340.242, began in 1996). In its current form, this program mandates that Portland-region businesses with over 100 employees at a given worksite must have a plan in place which aims to reduce by 10 percent of drive-alone auto trips to that worksite from an established baseline.

Oregon DEQ, TriMet and other regional partners are currently working with approximately 3,000 employment sites, encompassing over 40% of the employees in Clackamas, Multnomah and Washington counties. Partners provide an effective means of conducting outreach to businesses around the region. Commuter services are especially well received by the 800 employers who are subject to the DEQ ECO Rules. These employers are larger and account for approximately 25% of employees in the region. This means over 2,000 other (usually smaller) employment sites want commuter services to voluntarily provide a transportation options program for their employees.<sup>1</sup>

The five TMAs in the region are the first point of contact for businesses located within their defined boundaries to increase the number of employees using commute options. TMAs work with businesses to develop commuter programs that address the specific conditions that exist at a given worksite. Tasks associated with this include site assessment, ECO survey administration, encouraging employees to register in the regional ridematching database to increase car and vanpool formation, assisting TriMet with transit pass program sales, and providing technical support for walking and cycling programs.

Further work will be conducted this year to refine the RTO program's focus on employment areas where efforts have the best return on investment, where the greatest trip reduction impact can be achieved, and where businesses need assistance with non-ECO compliance issues. Elements of successful areas include employers willing to meaningfully participate and promote commute options, support from local government, and sufficient levels of infrastructure (ie: transit service, bike/ped connectivity) to improve the likelihood of reduced trips.

RTO staff will explore opportunities to collaborate with Metro's Sustainability Center to better integrate agency employer outreach efforts, leverage investments in technology, and coordinate messages.

Metro will continue management of the regional rideshare program. The rideshare program contains three sub-components:

1. Online ridematching system
2. Regional vanpool program
3. Rideshare incentive program

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<sup>1</sup> Statistics cited in this paragraph are estimates; will be finalized in version sent to TPAC.

Metro RTO program staff, augmented by contracted professional services, will carry out the following tasks to coordinate the employer program and provide commuter services:

- Coordinate partner outreach activities, facilitate communication between partners and identify a lead agency or organization for targeted employment areas.
- Maintain and refine online calendaring system for conducting, tracking and evaluating employer outreach activities.
- Identify target markets and business sectors.
- Add to and standardize the amount of data collected on employer efforts.
- Collaborate with partners on the development of a regional employer recognition program.
- Collaborate with partners on refining definition of employer rideshare program elements.
- Provide assistance to other partners at strategically selected outreach events.
- Provide lead role in working with businesses needing rideshare assistance.
- Provide initial response to phone or web-generated contacts; assess level of interest and coordinate hand-off to appropriate external partner.
- Implement new ridematching database, working with external partners on issues related to functionality, reporting, administration and management.
- Develop rideshare incentive program, working in conjunction with regional and state partners.
- Create newsletter content targeted at worksite Transportation Coordinators, to be delivered via Drive Less. Save More.
- Review progress reports for travel options grants related to employer outreach activities, compile comprehensive progress reports, and work with the RTO financial analyst to recommend payment of grant invoices.
- Collaborate with Metro's Sustainability Center to better integrate agency employer outreach efforts, leverage investments in technology, and coordinate messages.

#### **Key milestones for FY 10-11**

- September 10 – Ridematching database system implementation completed
- September 10 – Transportation Coordinator newsletter completed.
- September 10 – Quarterly report completed
- December 10 – Quarterly report completed
- December 10 – Rideshare incentive program implemented
- March 11 – Quarterly report completed
- June 11 – Quarterly report completed

#### **Deliverables**

- Updated plan for standardizing, conducting and evaluating employer outreach activities.
- Transportation Coordinator newsletter content.
- Collateral materials and web information.
- Ridematch system implementation, including marketing and incentive program.
- Updated employer outreach calendar.
- Quarterly progress reports.

## **Traveler information tools**

This program activity serves to provide information and services supporting increased use of travel options for all trips. In FY 10-11, RTO staff will continue to work with partner organizations led by Washington State Department of Transportation (WSDOT) to implement iCarpool, a multi-state, on-line ridematching system, serving Idaho, Oregon and Washington. iCarpool is an off-the-shelf program procured by WSDOT to replace a variety of systems currently in use by transit and rideshare agencies in the Northwest. This system will replace Metro's existing system, CarpoolMatchNW.org. Initial implementation is expected to take place in early 2010 with various system expansions taking place over the next two to three years. Development of a new marketing and outreach effort will be conducted, potentially at the state level in concert with other rideshare agencies and Oregon Department of Transportation (ODOT).

Metro RTO staff will carry out the following tasks in FY 10-11:

- Work with ODOT staff to develop and implement marketing and operation of the multi-state rideshare system in the Portland region.
- Work with WSDOT on ongoing implementation and development issues related to the new rideshare system.
- Review progress reports for travel options grants related to traveler information tools, compile comprehensive progress reports, and work with the RTO financial analyst to recommend payment of grant invoices.

## **Key milestones for FY 10-11**

- September 10 – Quarterly report completed
- December 10 – Quarterly report completed
- March 11 – Quarterly report completed
- June 11 – Quarterly report completed

## **Deliverables**

- Implementation of iCarpool
- Marketing strategy (with ODOT)
- Quarterly progress reports

## **Downtowns, centers and industrial areas**

The Regional Travel Options Program supports increased use of travel options in local downtowns, centers and industrial areas through grants to local jurisdictions, non-profit groups and public-private partnerships. RTO staff have a “wholesale” role while recipients of RTO grant recipients carry out the “retail” role.

The RTO program provides support to five Transportation Management Associations (TMAs). TMAs are nonprofit coalitions of business and public agencies interested in strengthening partnerships with businesses in centers and industrial areas. The TMA partnership with RTO is based on reducing traffic congestion and pollution by improving commuting options for employees and others.

TMA's will present revised work plans to the RTO Subcommittee for approval in spring 2010. These work plans set the course for TMA activities through FY 10-11. The RTO Subcommittee will consider findings, conclusions and recommendations of the RTO 2007-2008 Program Evaluation by Portland State University and an RTO staff report.

Metro RTO staff support partners in a "wholesale" manner and will carry out the following tasks related to downtowns, centers and industrial-area program objectives:

- Provide technical assistance for TMA project planning, implementation and evaluation activities.
- Assist TMA's to develop work plans that support the unique character of each area and recognize that each area is at a different level of development and has a unique mix of transportation infrastructure.
- Begin public-private partnership funding policy discussion for downtowns, centers and industrial areas.
- Develop and manage TMA funding agreements.
- Coordinate meetings of TMA Directors.
- Track TMA performance toward meeting outreach and performance targets.
- Provide progress reports to the RTO subcommittee.
- Review progress reports for TMA grants and work with the RTO financial analyst to recommend payment of grant invoices.

Additional downtowns and centers objectives will be carried out through the Regional Travel Options grant program. Grant program tasks, milestones and deliverables are described in the program administration portion of this work plan.

#### **Key milestones for FY 10-11**

- Oct 10 – TMA directors meeting held
- Feb 11 – TMA directors meeting held
- Apr 11 – TMA directors meeting held
- May 11 – TMA work plans and booster grant proposals presented to RTO Subcommittee.
- June 11 – TMA work plans and contracts finalized.

#### **Deliverables**

- TMA work plans and agreements
- Quarterly progress reports

#### **Measurement**

This program collects, analyzes and reports data for each RTO program to ensure that funds are invested in the most cost effective ways. RTO stakeholders use evaluation reports to refine program development, marketing and implementation. RTO program staff is responsible for carrying out measurement, called for in the TSMO Action Plan, Goal 5 (Measurement) of the RTO Strategic Plan and the RTO Evaluation Framework.

The RTO Evaluation Framework guides the level of analysis for each type of RTO project. It also clarifies that both RTO staff and RTO-funded partners have roles in data collection. RTO

will continue to use independent researchers to evaluate the program. Metro Research Center staff will be called upon to consult on the development of new research methods and tools.

Metro RTO staff will carry out the following tasks related to measurement and evaluation in FY 10-11:

- Conduct on-going data collection and tracking for RTO-funded programs.
- Address recommendations from the independent evaluation by Portland State University: RTO 2007-2008 Program Evaluation.
- Provide technical assistance to all RTO-funded partners.
- Develop information-sharing partnerships.
- Explore new methods and tools for storing data, analyzing data and reporting.

#### **Key milestones for FY 10-11**

- Enter into contract for RTO 2009-2010 Program Evaluation, to start by July 1, 2011.
- Quarterly progress reports.

#### **Deliverables**

- Data is collected and methods and databases improved.
- Technical services provided to RTO partners.
- Information-sharing partnerships are developed.

#### **Policy, funding and program administration**

This scope of work supports the program structure called for by the strategic plan including administration and management of RTO program functions by Metro.

The RTO program staff will:

- Chair and support RTO Subcommittee of TPAC, including logistics, scheduling and production of meeting summaries.
- RTO Subcommittee research and support on technical and financial issues.
- Create presentations about RTO program for Metro committees and regional partners.
- Administer contracts and agreements for RTO programs.
- Develop and submit FTA application for CMAQ grant funds and administer grants for RTO programs.
- Identify local matching funds sources for future years.
- Complete Business Energy Tax Credit (BETC) applications for the vanpool program.
- Develop the RTO work plan and program budget for fiscal year 11-12.
- Provide local transportation system plan support on achieving 2020 non-SOV targets.
- Collaborate with TSMO staff on developing an integrated and coordinated strategy for project development and delivery.
- Represent RTO program at Metro committees and jurisdictions and agency meetings.

#### **Key milestones for FY 10-11**

- Jan 10 – FY 10-11 work program and budget reviewed and adopted by RTO subcommittee

- Mar 10 – FY 10-11 work program and budget reviewed and adopted by TPAC, JPACT and the Metro Council
- June 10 – Submit BETC applications for FY 10-11 projects.

**Deliverables**

- FY 11-12 budget
- RTO subcommittee meeting summaries
- Quarterly progress reports

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**RTO STRATEGIC PLAN BUDGET 2010-2015**

Revenues:		(BUDGETED) FY 10-11	(PROJECTED) FY 11-12	(PROJECTED) FY 12-13	(PROJECTED) FY 13-14	(PROJECTED) FY 14-15	Totals
				2,200,000	2,200,000	TBD	4,400,000
							-
MTIP Key - 15548	1,882,000	-	1,521,869	102,888	155,885	101,358	1,882,000
MTIP Key - 15547	2,397,000	1,500,973	896,027	-	-	-	2,397,000
MTIP Keys - 14441, 14442 and 14443	782,956	782,956	-	-	-	-	782,956
5307 Funds (generated by Van Pool Program)	-	-	-	120,000	120,000	120,000	360,000
BETC	-	-	-	-	-	58,538	58,538
Bike There! (Current year sales)	-	-	-	-	-	-	-
Walk There! (Current year sales)	-	-	-	-	-	-	-
Walk There! (Current Year Grant)	-	-	-	-	-	-	-
Metro match (General Fund)		19,490	20,269	21,079	21,922	22,798	105,558
<b>Fund Balance:</b>							
BETC (prior years)		50,000	50,000	-	-	-	100,000
Bike There! (prior year sales)		20,000	20,000	20,000	20,000	20,000	100,000
Walk There! Kaiser Grant		50,000	-	-	-	-	50,000
DLSM Sponsorship		-	-	-	-	-	-
<b>Total Revenue to/from Metro:</b>	5,061,956	2,423,419	2,508,165	2,463,967	2,517,807	322,694	10,236,052
							10,236,052
<b>Expenditures:</b>	<b>FTE</b>	<b>(BUDGETED)</b>	<b>(PROJECTED)</b>	<b>(PROJECTED)</b>	<b>(PROJECTED)</b>	<b>(PROJECTED)</b>	<b>Totals</b>
<b>Administration:</b>	<b>10-11</b>	<b>FY 10-11</b>	<b>FY 11-12</b>	<b>FY 12-13</b>	<b>FY 13-14</b>	<b>FY 14-15</b>	
FTE	0.650	93,775	99,401	105,365	111,687	118,389	528,618
M & S		21,913	22,570	23,247	23,945	24,663	116,337
<b>Evaluation and Measurement:</b>							-
FTE	0.650	92,685	98,246	104,140	110,389	117,012	522,472
Intern	0.500	30,673	32,514	34,465	36,532	38,724	172,908
M & S		58,609	35,000	12,220	90,000	12,964	208,793
<b>RTO Subcommittee:</b>							-
FTE	0.500	56,557	59,950	63,547	67,360	71,402	318,816
M & S		-					-
<b>Collaborative Marketing:</b>							-
FTE	1.200	138,406	146,710	155,513	164,843	174,734	780,206
Bike There!		20,000	-	-	-	-	20,000
Walk There		70,000	-	-	-	-	70,000
Sponsorships		22,054	22,716	23,397	24,099	24,822	117,088
M & S		55,564	41,996	43,256	44,553	45,890	231,259
<b>Commuter Program:</b>							-
FTE	1.450	153,095	162,281	172,018	182,339	193,279	863,011
TriMet		396,777	408,680	420,941	433,569	446,576	2,106,543
SMART		64,184	66,110	68,093	70,136	72,240	340,762
Ridematch		30,000	30,900	31,827	32,782	33,765	159,274
M & S		20,000	25,000	25,000	25,000	25,000	120,000
<b>RTO Grants:</b>							-
FTE	0.500	67,995	72,074	72,074	76,399	80,983	369,524
Travel Options		175,000	262,500	270,375	278,486	286,841	1,273,202
Individualized Marketing		356,000	444,000	350,000	250,000	250,000	1,650,000
<b>TMA:</b>							-
FTE	0.500	67,995	72,074	76,399	80,983	85,841	383,291
TMA Grants		135,265	139,323	143,502	143,502	147,807	709,400
Booster Grants		125,000	125,000	125,000	125,000	125,000	625,000
Policy Study		33,081	-	-	-	-	-
<b>Regional Vanpool:</b>							-
FTE	0.250	38,793	41,121	43,588	46,204	48,976	218,682
M & S		100,000	100,000	100,000	100,000	100,000	500,000
Total expenditures		2,423,419	2,508,165	2,463,967	2,517,807	2,524,908	12,405,185
Budget Surplus/(Shortfall)		0	(0)	0	(0)	(2,202,214)	
Total FTE	6.200						
<b>Partners Match:</b>							
Partners match		253,058	314,649	378,088	443,430	510,732	1,899,957
Total Match:		253,058	314,649	378,088	443,430	510,732	1,899,957
Total Expense		2,676,476	2,822,814	2,842,055	2,961,237	3,035,640	14,305,141