STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 98-2676 FOR THE PURPOSE OF ESTABLISHING A POLICY BASIS AND FUNDING STRATEGY FOR TRANSPORTATION MANAGEMENT ASSOCIATIONS (TMAs) FOR THE MTIP/STIP DEVELOPMENT PROCESS

Date: July 20, 1998 Presented by: Andrew Cotugno

PROPOSED ACTION

This resolution and Exhibit A establish a policy basis and three year-phased funding strategy for review and implementation of Transportation Management Association (TMA) proposals for the upcoming MTIP/STIP development process. The policy basis recognizes three stages of development and places primary emphasis on the initial stage (Exploratory) which focuses on conducting a feasibility study/needs assessment to identify common issues and levels of commitment and financial support. In addition, the resolution establishes preliminary screening criteria for reviewing TMA proposals and developing a short list for further consideration and evaluation in the MTIP/STIP process. The resolution addresses the policy and programmatic issues of how many TMAs should the region fund; where should TMAs be implemented; and on what basis should regional funds be allocated?

The resolution also recognizes the need for Metro to amend the RTP to incorporate the recommended policy basis for TMAs; places general administrative oversight for the regional TMA program with Tri-Met; and places the responsibility for the initial review and ranking of TMA proposals with the TPAC Transportation Demand Management Subcommittee. Tri-Met, in conjunction with the TPAC TDM Subcommittee, will develop and forward its recommendation through the TPAC/JPACT/Metro Council approval process.

TPAC has reviewed this Transportation Management Association policy and funding strategy and recommends approval of Resolution No. 98-2676.

FACTUAL BACKGROUND AND ANALYSIS

Transportation Management Associations (TMAs) are nonprofit coalitions of local businesses and/or public agencies dedicated to reducing traffic congestion and pollution and improving commuting options for their employees. In this role, TMAs have become an important institutional option for implementing transportation demand management (TDM) strategies, particularly those designed to increase the use of alternative modes of travel.

A number of TMA studies and surveys[1] at the national and local level have been conducted in recent years to document the

[1] Ferguson, Erik and Diane Davidson, ATransportation Management Associations,@ in Transportation Quarterly, Volume 49, Number 1, Winter 1995 pp 45-60.

specific operating characteristics of TMAs and to identify activities and performance criteria that constitute a successful model. Key findings from these studies show the following general trends.

TMA Mission

TMAs differ among themselves in terms of mission or orientation. Some TMAs focus more on community leadership and advocacy to influence policy decisions. Others are more service-oriented and actively solicit and/or implement rideshare matching, shuttle services, vanpooling and guaranteed ride-home programs.

TMA Demographics

TMAs typically are formed in three different geographical settings including downtown areas, suburban activity centers, and other special areas such as corridors, recreational centers and employment/industrial locations. Downtown areas enjoy a high potential for public/private partnerships because employment normally includes significant representation from both public and private organizations.

Suburban activity centers, although smaller than traditional Central Business Districts (CBDs), are characterized by rapid growth and, because they are usually less well served by alternative modes of transportation, have the potential to benefit from TMA formation.

TMAs in "other" areas are generally broader in scope and may cover multiple areas.

Regardless of the geographical setting, most TMAs are formed for one of three main reasons:

- To respond to existing transportation-related needs.
- To mitigate anticipated traffic created by new and future development.
- To centralize and coordinate the TDM efforts of individual employers.

TMA Development

TMAs normally pass through three major stages of development prior to attaining organizational stability. These stages include the exploratory, formative and operational.

The exploratory stage is usually characterized by identification of the market area, potential clients, data collection and analysis, problem definition and consensus building in order to form a constituency of interests in solving an identified problem or issue. A feasibility study/needs assessment provides the focus of this stage, the final products of which are a business and financial plan.

The formative stage implements the business and financial plans and includes start-up costs for beginning operation, preparation of legal documents, establishment of dues structure, member recruitment, staff hiring and development of a work plan.

The operational stage focuses on implementation of the work plan, achievement of goals and objectives, and the provision of new and expanded services to TMA members.

TMA Membership

At the national level, membership in TMAs increased from an average of 26 member companies in 1991 to an average of 46 in 1993. The trend shows that as TMAs mature and reach stability, membership tends to increase.

Funding Mix

In 1991, the average TMA derived 44 percent of its revenue from private sources, including 21 percent from membership dues. In 1993, the average TMA reported that 53 percent of its revenue came from private sources including 47 percent from membership dues. Larger TMAs tend to rely less on membership dues and more on grant revenues. Twenty percent of large TMAs surveyed with annual budgets over $300,000 received no dues at all.

TMA Dues Structure

Dues generally fall into one of three categories. Dues for employers are normally assessed on a per employee basis. Dues for developers are assessed on a square footage basis. Dues for public agencies are often assessed on a flat rate or fee simple basis. The survey found that employer dues vary widely from $.50 to $18 per employee per year. Developer dues average less than $.10 per square foot of buildable or leasable space per year.

TMA Provision of Services

The studies identified four separate roles for TMAs:

1. Provide employee transportation services, commuter information and assistance.
2. Advocate within the urban transportation planning process.
3. Provide sponsorship or funding for special studies.
4. Provide private management assistance to public sector organizations.

The total number of services offered by individual TMAs vary more as a function of age and organizational stability than by geographic location. In addition, the provision of services are classified as either "*soft*" or "*hard*" approaches. *Soft*

approaches are typically composed of information services and promotional efforts. *Hard* approaches usually involve delivery of actual transportation services, financial incentives for alternative modes or disincentives to driving alone. As expected, soft strategies based on information services and promotional efforts are the most prevalent among TMAs.

A list of potential TMA services made available to member organizations include the following:

- advocacy
- rideshare promotion at employer sites
- periodical publications and other printed materials
- vanpool formation assistance
- ridematching services
- trip-reduction plan preparation
- development/processing of employee surveys
- guaranteed ride-home programs
- training programs for employee transportation coordinators
- parking management programs/assistance
- on-site transit pass sales
- shuttle services
- vanpool subsidy programs

TMAs with larger budgets generally offer the most complete range of integrated services, including vanpool services, rideshare matching, trip-reduction planning, employee surveys, parking management, guaranteed ride-home programs, training, shuttle services and advocacy. TMAs with smaller budgets concentrate more on information-based programs such as advocacy, promotions, publishing and distribution of literature, and rideshare matching.

TMA Budgets

The TMA studies found that the provision of *hard* services requires an annual budget of approximately $75,000 whereas TMAs with less than $75,000 do not have the financial strength to implement effective, integrated services and therefore rely more on *soft* services.

TMA Staffing Levels

All TMAs studied with budgets in the $50,000-75,000 range have one staff person. The mean staff size for all TMAs is 1.7 persons. TMAs typically contract out services or hire part-time employees to make up for reduced budgets. Types of services contracted out include accounting, legal services, transit/ shuttle operations, grant writing, and newsletter design and mailing.

TMA Management/Organizational Structure

Most TMAs with budgets over $50,000 are managed by an Executive Director and a Board of Directors. Legal counsel is retained as needed. None of the TMAs surveyed have a staff attorney. The typical TMA board meets five or six times per year.

TMA Evaluation

Over half (53%) of the TMAs surveyed in 1993 did not evaluate their effectiveness. Geographic scope and budget size are not factors in determining whether an evaluation had been performed. Survey results indicated that older TMAs are more likely to conduct an evaluation. Before and after evaluations were found to be almost non-existent, even though this type of information is needed to test explicitly for behavioral changes induced by TMA activities. Most TMA evaluations continue to focus on member satisfaction with services offered rather than actual utilization of alternatives to single occupant commuting including the potential for reducing VMT and improving air quality.

TMA Success

The primary elements that characterize a successful TMA[2] include: 1) a well-defined problem established through a feasibility study/needs assessment process; 2) identified strategies and sufficient resources; 3) private and public sector support; 4) sufficient target market of employers and employees; and 5) existing legal or regulatory transportation requirements. The worst model for a TMA is shown to be a diverse mix of businesses, large in geographical extent, with no common interests or transportation issues.

Portland Experience

The Portland region currently has three operating Transportation Management Associations (TMAs). They are located in the Lloyd District (Lloyd District TMA), City of Beaverton (Westside Transportation Alliance TMA), and the City of Tualatin (Tualatin TMA). Although the operating and funding characteristics of each are different, they share the same primary goals of helping member companies design transportation programs to relieve congestion, promote alternative modes, and meet the requirements of the State's Transportation Planning Rule (TPR) and DEQ's Employee Commute Options rule.

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[2] Commuter Transportation Services, Inc., TMA Handbook, page 15.

Lloyd District TMA

Executive Director: Rick Williams
Current Annual Budget: $90,000
FTE: 1.25 between two people (Executive Director and staff assistant)

Start-up - $250,000 of CMAQ funds administered by the City of Portland. The purpose was to fund the TMA to assist with implementation and ongoing support for ECO employers in the Lloyd District. Tri-Met contributed $35,000 in FY 97/98.

The Lloyd District TMA includes 28 employers and 3,144 employees who take part in Tri-Met's annual transit pass program. Although the CMAQ funds ended in June 1998, Tri-Met is considering some level of funding next fiscal year.

The Lloyd TMA Board of Directors established a future goal of 2.5 FTE and a desired annual budget of $225,000. The TMA is moving toward becoming an "Assessment District" as the preferred source of long-term funding rather than dues. The Lloyd TMA has a requirement that one-third of all money raised must come from the private sector.

The Lloyd District TMA collected approximately $6,000 in dues from member companies last year. Dues are voluntary and average approximately $50 per company per year. The informal agreement is that companies over 25 employees pay $2.00 per employee per year. For example, Kaiser with 500 employees pays $1,000 per year.

Other future revenue sources include $75,000 per year from parking meter revenues and commissions on Pass Port sales. Last year, the TMA received about $5,000 for their commission share of sales.

Westside Transportation Alliance (TMA)

Executive Director: TBD
Annual Budget: Approximately $100,000-125,000. However, the TMA currently operates on approximately 80 percent of this amount.
FTE: 1.5 - 1.75 (Executive Director and one or two quarter-time assistants)

Start-up - $250,000 of CMAQ funds administered by the City of Beaverton. The purpose was to fund the TMA to assist with implementation and ongoing support for ECO employers in the Beaverton area. Only $93,000 of the initial CMAQ funds have been expended by the TMA. The remaining funds were returned to DEQ when the TMA opted to establish itself independent of the City of Beaver-ton.

According to the previous Executive Director, there are currently 134 member companies in the TMA. In addition, the TMA can potentially represent one-third of the ECO effected employers (500

companies) and one-half of the employees (200,000 people). Dues are based on $10 per FTE.

Tualatin Transportation Management Association (TMA)

Program Manager: Dan Kaempff
Annual Budget: $90,000
FTE: 1.0

Start-up - The TMA was initially provided $60,000 from Tri-Met as seed money to begin operation of the TMA for member employers. The TMA has received $40,000 from Tri-Met this year and Tri-Met indicates they will provide $20,000 next year to help keep the TMA operating. JPACT, at their May meeting, recommended allocation of $40,000 for the TMA to be divided between second-year operation ($20,000) and to establish a vanpool program ($20,000).

There are currently 13 member companies representing approximately 1,400 employees. Dues are currently $20 per employee per year.

Future plans call for an additional half-time staff assistant (0.5 FTE) and an annual operating budget of $200,000. This level of funding would continue the shuttle service, purchase an additional bus, and provide for much needed public education and outreach material/programs.

Transit Choices for Livability (TCL)

Tri-Met's TCL project, which outlines a 10 year community transit plan to better link neighborhoods with regional activity centers, identified 25 potential locations where TMA development would facilitate implementation of the TCL plan.

JPACT/Metro Council Recommendation

Exhibit A to the resolution establishes a regional policy framework and phased funding strategy for reviewing TMA proposals in conjunction with the MTIP/STIP development process. The recommendation establishes the scope, administrative responsibility, budget and regional funding share for implementing TMAs in the Portland region.

98-2676.RES
RL:lmk
8-3-98

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ESTABLISHING A POLICY BASIS AND FUNDING STRATEGY FOR TRANSPORTATION MANAGEMENT ASSOCIATIONS (TMAs) FOR THE MTIP/STIP DEVELOPMENT PROCESS	RESOLUTION NO. 98-2676 Introduced by Councilor Washington, Chair JPACT

WHEREAS, Metro is in the process of completing an update to the *Regional Transportation Plan* (RTP) for adoption in December 1998; and

WHEREAS, The RTP is designed to implement the region's 2040 Growth Concept by providing alternative transportation options to best serve different land use components; and

WHEREAS, Implementation of the 2040 Growth Concept requires the use of alternative modes of travel in order to avoid unacceptable levels of congestion and to ensure that accessibility by alternative modes is attractive; and

WHEREAS, Transportation Demand Management (TDM) encompasses a series of strategies, techniques and supporting actions to promote the use of alternative modes; and

WHEREAS, The State's Transportation Planning Rule (TPR) requires a reduction in vehicle miles traveled (VMT) over the 20-year planning period of the RTP; and

WHEREAS, The Employee Commute Options (ECO) rule requires employers with more than 50 employees at a work site to reduce vehicle trips by 10 percent; and

WHEREAS, The RTP establishes Regional TDM policy and

objectives to help reduce vehicle trips and VMT; and

WHEREAS, Goal 5, Objective 2 of the RTP, promotes the establishment of Transportation Management Associations (TMAs) as a means to support programs to reduce the need to travel and to make it more convenient for people to use alternative modes for all trips throughout the region; and

WHEREAS, The RTP does not currently include a comprehensive approach to TMA development, implementation and funding; and

WHEREAS, The Portland region currently has three operating TMAs and has identified an additional twenty-five potential locations for TMA development through Tri-Met's Transit Choices for Livability effort; and

WHEREAS, JPACT proposed that Metro proceed with development of a policy basis and funding strategy to determine how to accommodate more TMAs in the region and what process should be used to review TMA proposals for the MTIP/STIP development process; now, therefore,

BE IT RESOLVED:

1. That the Metro Council and JPACT endorse the model framework for consideration of TMAs as described in Exhibit A to this resolution.

2. That Tri-Met assumes the general administrative oversight for the regional TMA program. That Tri-Met in conjunction with the TPAC TDM Subcommittee will be responsible for initial review and screening of TMA proposals and development of a recommendation to TPAC/JPACT/Metro Council.

3. That the MTIP/STIP development process will consider the extent to which TMA formation will be funded. There should not, however, be an expectation that all potential TMAs will be funded with federal funds in any of the stages of development.

4. That once a decision is made on how many TMAs to fund, a priority ranking of candidate locations will be developed through the TPAC/JPACT/Metro Council approval process.

ADOPTED by the Metro Council this _____ day of ____, 1998.

_____
Jon Kvistad, Presiding Officer

Approved as to Form:

_____
Daniel B. Cooper, General Counsel

RL:lmk

EXHIBIT A

Recommendation for TMA Policy Basis

Adoption of Resolution No. 98-2676 establishes the following policy basis for reviewing TMA proposals in conjunction with the MTIP/STIP development process. These policies/procedures are based on information developed in the staff report to this resolution.

TMA Application/Proposal Process

Applications for the formation and regional funding of TMAs will be made directly to Tri-Met. Tri-Met will utilize the TPAC TDM Subcommittee for initial review and screening of applications.

Initial Screening Criteria

TMA applications/proposals for the upcoming MTIP/STIP development process will be screened by the TDM Subcommittee relative to the following criteria:

- Is the TMA proposed in an area that would benefit from a TMA (ie., population/employment density; 2040 design type/land use link)?

- Is there demonstration of community support for a TMA? Is there an identified problem/issue common to the geographical area?

- Is there an identified anchor patron, major employer/organization, chamber of commerce, developer, etc. supporting the formation of the TMA?

- Will the TMA assist in the potential to meet the non-auto mode split targets established for the area, reduce VMT, reduce single-occupant vehicle trips, etc.?

TMA Development/Implementation

During the *Exploratory* stage of development, a Feasibility Study/ Needs Assessment will be conducted to determine the economic and transportation barriers to businesses and to identify solutions, common issues and interests, and appropriate levels of commitment for private sector financial/in-kind investment in the TMA. Products will include a business and financial plan to identify the TMA's mission, responsibility, and near-term and long-term funding needs.

The *Formative* stage will be characterized by implementation of the business plan and financial plan, development of an implementation work plan, establishment of an appropriate dues structure, member recruitment procedures, staffing requirements, outreach, and preparation of legal documentation.

The *Operational* stage will focus on implementation of the work plan, achievement of goals and objectives, and the provision of new and expanded services to TMA members.

As identified previously, the most important determinants to a successful TMA model are the proximity of businesses linked by common interest in specific issues and the level of commitment to their solution, rather than mere size and density. Emphasis should be on "access" and "development of transportation alternatives" as the key purposes for the TMA.

TMA Funding Strategy

Adoption of Resolution No. 98-2676 establishes the following phased strategy for funding TMA proposals through the MTIP/STIP development process.

Exploratory Stage - Up to $35,000 (Each)

During this stage, regional funding assistance will be in the form of seed money to be used to conduct a feasibility/needs assessment to: determine common issues of potential members; identify proposed solutions; conduct business surveys of member companies; conduct focus groups; and prepare final report and recommendation concerning feasibility of TMA formation. A 10 percent local match (up to $3,000) from the sponsoring jurisdiction is required.

Implementation Model - Formative/Operations Stage
$225,000 over three years

Formative/Operations Stage - $75,000 per year for three years.

The Formative stage will include implementation of the business plan and financial plan, development of an implementation work plan, establishment of an appropriate dues structure, member recruitment procedures, staffing requirements, outreach, and preparation of legal documentation.

The Operational stage will focus on implementation of the work plan, achievement of goals and objectives, and the provision of new and expanded services to TMA members.

Regional Share

During the three-year implementation cycle, regional funds would be ratcheted down according to the following proposed schedule:

Year 1 - 90 percent Regional funds equals $75,000 x .9 = $67,500

Year 2 - 2/3 Regional funds equals $75,000 x .67 = $50,250

Year 3 - 1/3 Regional funds equals $75,000 x .33 = $24,750

Total $142,500

Commitment of Local Funds

During the three-year implementation cycle, the commitment of local funds would be ratcheted up according to the following proposed schedule:

Year 1 - 10 percent Local match equals $75,000 x .10 = $7,500

Year 2 - 1/3 Local match equals $75,000 x .33 = $24,750

Year 3 - 2/3 Local match equals $75,000 x .67 = $50,250

Total $82,500

After year 3, the implementation model assumes an ongoing commitment of one-third to one-half ($25,000 - $35,000) of local public funds to keep the TMA operating. Allocation of regional funds would be dependent upon re-application for funding through the MTIP/STIP process.

This suggested phasing of activities does not preclude a proposal from skipping the exploratory stage and making application for funding under the formative/operations stage. However, the applicant must document the results of the exploratory stage identifying the following: What did the feasibility study/needs analysis show; what are the common issues; what are the proposed solutions; what is the level of commitment from the business surveys; who is the primary sponsor; and does the formation of a TMA in this area have potential for reducing VMT and helping implement the 2040 Growth Concept?

Issues for the MTIP/STIP Process

Approval of the implementation strategy outlined in Exhibit A provides for the following specific issues to be decided in the MTIP/STIP approval process:

At an average cost of $35,000 each, how many proposals for conducting feasibility/needs analysis should be approved?

Assuming the requirements under the Exploratory stage have been satisfied, how many regionally funded three-year implementation programs (formative/operations stage) @ $142,500 each should be approved?

As part of the MTIP/STIP solicitation process, local governments will be asked to submit candidate TMAs. The TDM Subcommittee will evaluate the candidate TMAs and forward a recommendation for a MTIP/STIP TMA funding package for TPAC/JPACT/Metro Council consideration. The package will include recommended pots of money for both TMA feasibility *(Exploratory)* and implementation *(Formative/Operational)* stages. The idea is that the pots of money would be identified, and follow-up work through the TDM Subcommittee would recommend funding for actual TMAs.

As mentioned, decisions on the TMAs' proposals to be funded would be made through MTIP/STIP amendments. The amendment process is recommended since substantial work remains to identify and test potential TMAs for regional funding. Again, Tri-Met has agreed to administer the program, including any FTA grants, once the TMAs have been approved for funding.

RL:lmk
98-2676.RES
7-24-98

METRO

PRIORITIES 2000 SOLICITATION PACKAGE

FY 2000 Update of the Metropolitan and State Transportation Improvement Program

September 2, 1998

PRIORITIES '2000

SOLICIATION PACKET

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Attachments

TABLE 1: Net Available Funds for Allocation

TABLE 2: TEA-21 High Priority Project Schedule and Authorization

Attachment 1: FY 2000 MTIP/STIP Project Selection Process (11'X 17' Flow Chart at end of document)

Attachment 2: Summary of Project Technical Ranking Criteria (11" X 17" table at end of document)

Attachment 3: Detailed Project Technical Ranking Criteria:

- Pedestrian
- TOD
- Bike
- Roadway Expansion
- Roadway Reconstruction
- Transit
- Freight/Intermodal
- TDM
- Boulevard Projects
- 2040 Technical Ranking Criteria
- 2040 Freight Technical Ranking Criteria

Attachment 4: Metro Public Involvement Checklist

Attachment 5: Project Ranking and Selection Schedule

METRO

PRIORITIES 2000 PROJECT SOLICITATION PACKET

At the direction of JPACT and the Metro Council, Metro is now soliciting for award of approximately $75.8 million of regional flexible funds to new projects. Enclosed is a Priorities 2000 Solicitation Packet. Metro requests that you, as a recipient of this information for your jurisdiction, assume responsibility to provide this information to appropriate staff for completion. In particular, please assure that appropriate parks bureau and other eligible "non-traditional" agency staff are informed of this solicitation. Please assure that project nomination data is submitted to **Terry Whisler, Metro Headquarters, 600 NE Grand Avenue, Portland Oregon 97232, by Friday October 16, 1998**

BACKGROUND TO TRANSPORTATION IMPROVEMENT PROGRAM

Link to the Regional Transportation Plan

Federal and state regulations require Metro to plan a regional transportation system that addresses local, state and interstate transportation needs. This system is described in the 1995 Metro Regional Transportation Plan (RTP). The RTP describes current conditions and improvements that are needed over the next 20 years to assure that adequate transportation services are available in the region. One large set of improvements achieves a preferred system and would cost approximately $4 billion to build. A second, smaller system responds to federal requirements that a "financially constrained" network be described. This collection of improvements would cost approximately $1 billion. This is the amount of funds of all kinds that can be reasonably anticipated over the next 20 years for transportation improvement purposes in the region *(Note: the 1995 RTP is currently undergoing revisions expected to be complete in late 1998. These revisions will not alter the basic dollar amounts expected to be available for a constrained network or required to develop a preferred system.)*

What is the Transportation Improvement Program?

The Transportation Improvement Program (TIP) is a short term funding and implementation tool. Both Metro and ODOT prepare TIPs. By federal regulation Metro's TIP (MTIP) must be included without change in ODOT's program (STIP). The MTIP/STIP must also be financially constrained to reasonably anticipated funding sources. It is primarily a document for tracking the allocation and expenditure of federal and state transportation funds to projects identified in the financially constrained RTP network. The MTIP/STIP also schedules the phases of work needed to complete projects in relation to when identified funding will be available. Because the 20-year RTP network exceeds the funds available at any one

time, Metro oversees a project nomination, ranking and selection process as new transportation funds become available (see Attachment 1). Since both the MTIP and STIP must be the same, ODOT joins with Metro to conduct these program updates for the Portland Metropolitan area. The current update is allocating FY 2000 - 2003 funds (i.e., four years of funding). It is also addressing new federal funds that will be received in FY 98 and 99 that exceed projected funds programmed in the current FY 1998 - 2001 MTIP/STIP. This is described further, below.

FY 1998 - 2000 MTIP/STIP

In June of 1997, JPACT and Metro Council approved an FY 1998 update of the MTIP/STIP which was later approved by the Oregon Transportation Commission. The program was adopted prior to expiration of ISTEA and prior to adoption of the next federal transportation bill. The program allocated about $134 million of *estimated* FY 1998 through FY 2001 federal and state transportation funds to projects. Most funding went to complete previously approved projects. A small portion (about $14 million) went to complete new phases of previously programmed work. No entirely new projects were allocated funds.

DETAILS OF FY 2000 MTIP/STIP UPDATE

Transportation Efficiency Act for the 21st Century (TEA-21)

In May of 1998, Congress adopted the successor to ISTEA (the prior six-year federal funding act). The new six year transportation bill, TEA-21, awarded more money in FY 1998 - 2001 than was anticipated by the region. It also authorizes FY 2002 - 2003 funds that were not addressed in the FY 98 MTIP/STIP. The difference between previously programmed regional flexible funds and those now expected to be available is approximately $75.8 million.

An additional $21 million of state gas tax funds will also be available in FY 2002 - 2003 that is not allocated in the current MTIP/STIP. Finally, TEA-21 allocated about $69 million dedicated to a list of "high priority" transportation projects in the Metro region. To receive these funds, the projects must be programmed and scheduled in the MTIP/STIP. Table 1 shows all transportation funds that are currently expected to be available to the region in FY 1998 - 2003. Table 2 shows the high priority projects and associated funding.

What Kinds of Funding Are Available?

The regional flexible funds are comprised of three categories of federal money which come with differing restrictions. The most flexible funds are surface transportation program (STP) funds which may be used for virtually any transportation purpose short of building local residential streets. The region expects to receive about $33.2 million of uncommitted STP funds over the six years of TEA-21.

The second category of money is Congestion Mitigation/Air Quality (CMAQ) funds. CMAQ funds cannot be used to build new lanes for automobile travel demand. Also, projects which use CMAQ funds must demonstrate that some improvement of air

quality will result from building or operating the project. The region expects about $37.7 million of uncommitted CMAQ funds.

The third category of money is Transportation Enhancement funds. Enhancement funds are also ineligible for use in building new travel capacity for automobiles. Use of Enhancement funds is limited to a list of ten eligible activities including bike and pedestrian projects (with transportation function versus purely recreational benefits); purchase of scenic easements, removal of outdoor advertising, restoration of historic transportation facilities, preservation of abandoned rail corridors for future trail purposes, mitigation of transportation related water quality impacts, among others. The region expects about $4.9 million of uncommitted Enhancement funds.

In addition to these federal funds that are allocated to the region, ODOT receives funds whose use is limited by the state constitution to improvement of publicly owned rights-of-way for transportation purposes. Additionally, ODOT has primary responsibility for programming federal highway funds received by the state as a whole. The Oregon Transportation Commission allocates both types of funds to each of the five ODOT Regions. Region 1 of ODOT, which encompasses all of the urban portions of Multnomah, Clackamas and Washington Counties, expects to receive a combined amount of about $21 million for modernization of state and interstate highways in FY 2002 - 2003 (the prior allocations are already programmed). This update will address ODOT proposed priorities for expenditure of these funds.

Finally, TEA-21 allocated about $69 million to a list of 12 "high priority" transportation projects (see Table 2). These include freeway, freight, arterial and transit improvements. To receive these funds, the projects must be shown in the MTIP/STIP according to the year(s) in which they are expected to proceed. In some cases, local agency sponsors of these projects may request supplemental funding to complete all desired project phases. These issues will be addressed in the current update.

Special Program Focus: 2040 Growth Concept

This MTIP/STIP update continues to implement Metro's general policy of allocating discretionary flexible funds to help implement the integrated land use and transportation objectives of the Regional Framework Plan, the Urban Growth Management Functional Plan and the 2040 Growth Concept. Projects which benefit the highest priority land uses (i.e., Central City, Regional Centers and Industrial Sanctuaries) are eligible to receive higher scores – up to a maximum of five additional points out of total of 100 -- than projects which benefit lower priority land use types (e.g., Town Centers, Main Streets, Corridors, etc.). Most of the currently approved criteria though, are fundamentally the same as those used in the past several MTIP/STIP updates. The criteria are discussed in more detail, below. Attachment 2 summarizes the Technical Ranking criteria. Attachment 3 provides the detailed technical criteria, including the general and freight related 2040 criteria.

Boulevard Project Category

One important revision of the criteria is inclusion of Boulevard Projects as a new project category. The *Urban Growth Management Functional Plan (Title 6, Attachment A)* identified Boulevard Street Design Classifications throughout the region. JPACT and the Metro Council are looking to fund some boulevard projects in this update and actively encourage jurisdictions to nominate suitable projects. (The new boulevard technical criteria are included in the detailed criteria description sheets in Attachment 3).

Eligible Candidate Projects

Metro is soliciting nominations for $75.8 million of regional flexible funds. Eligible projects include road modernization, road reconstruction, bike, pedestrian, boulevard, freight, transit, transit oriented development and transportation demand management projects. Project sponsors are those agencies who propose the project *and who stand ready to provide the required minimum local match of 10.27 percent* Ownership of the subject facility is desirable but not required if concurrence between the proposing sponsor and the facility owner/operator is included in the project nomination (e.g., a city or county may propose improvement of a state highway if ODOT's concurrence is obtained prior to project nomination and local match requirements are met).

ODOT will formulate priorities for improvement of state and interstate highways within the region that will program the $21 million of state modernization funds. JPACT and the Metro Council will work with Region 1 staff to develop a jointly approved recommendation for subsequent consideration by the Oregon Transportation Commission. Local agency recommendations regarding this class of projects may be forwarded to ODOT. However, local agency nominations are not requested for such projects as part of Metro's flexible funds allocation process.

Preliminary Screening Criteria and Local Funding Targets

JPACT and the Metro Council adopted four initial screening criteria. Candidate projects will not be ranked by Metro staff if the do not meet the following conditions.

1. Candidate projects must be consistent with regional street design guidelines for highway, road, street and boulevard design classifications. Project conceptual features must be consistent with those described in the guidelines for the appropriate facility classification. Street classifications for the regionally significant transportation system are described in *the Growth Management Functional Plan (Title Six, Attachment A)*. Please access Metro's home page at the web address:

   www.metro-region.org\transpo\transpo.html

   to view a base version and "clickable" sub-area pieces of the Street Classification Map. After reaching the transportation section web page, scroll down to the special features section and click on the blue *Priorities 2000* hypertext link.

2. Project designs must be consistent with the Functional Classification System described in the 1997 Regional Framework Plan. The Framework Plan adopted

maps of regional street design classification and motor vehicle, public transit, freight, pedestrian and bike systems. Projects proposed on facilities identified on these system maps must be consistent with the associated system functions. Please access Metro's home page at the web address:

www.metro-region.org\transp\ transpo.html

to view a base version and "clickable" sub-area pieces of the Functional Classification maps. After reaching the transportation section web page, scroll down to the special features section and click on the blue *Priorities 2000* hypertext link.

3. The project must be included in the second round draft list of RTP Strategic Network projects.

4. Nominations from each of the three counties and the City of Portland must be constrained to the following local funding targets:

LOCAL AGENCY FUNDING TARGETS

Agency	Percent of Metro Population		Percent * $75.8M		Target (Share x 3)
City of Portland:	42%	=	$31.836M * 3	=	$95.508M
Clackamas County:	18%	=	13.644M * 3	=	40.932M
Multnomah County:	9%	=	6.822M * 3	=	20.466M
Washington County:	31%	=	23.498M * 3	=	70.494M

These targets are established by determining the percentage of Metro jurisdiction 1997 population residing in each jurisdiction, including the population within the three counties. This factor is used to divide the $75.8 million of regional flexible funds into four portions. This sum is then increased three fold. The federal portion of nominated projects should fall within these targets. This includes nominations of the cities within the three counties (with the exception of Portland). Improvement of Multnomah County bridges within the City of Portland will be credited against the City's target. No targets are set for nominations from Metro, Tri-Met, the Port of Portland and ODOT. It is expected though, that nominations from these agencies will be conservative and reflect the inherent funding limitations.

It should be clearly understood that these targets do not represent funding allocations. Regional equity is only one of many factors that the Metro, JPACT and the Oregon Transportation Commission will use to determine final allocation of these regional funds.

If you have questions regarding the relationship of a candidate project with these screening criteria, call Terry Whisler at 797-1747.

Public Involvement

Pursuant to federal and state regulations, Metro has adopted public involvement policies and procedures which affect the project selection process. The policies prescribe that projects nominated by local agencies for regional funding must derive from approved transportation system plans or capital programs of the sponsoring jurisdiction. Metro is aware that delayed adoption of the Regional Transportation Plan update has delayed local government development and approval of some transportation system plan amendments and associated capital program updates. Metro is also aware that the compressed solicitation period will make it difficult for local governing bodies to formally approve nominated project lists. Because of the extensive process associated with development of the Strategic Network of the RTP update, Metro will consider its public involvement policies to be met – for purposes of project technical ranking – in so far as nominated projects are chosen from this list of strategic projects. However, prior to announcing preliminary technical ranking results in December/January, Metro will request a resolution of endorsement from the governing body of all agencies sponsoring a candidate project and completion of the Metro local public involvement checklist (see Attachment 4).

Project submittals that come from locally adopted Capital Improvement Programs which were subject to a noticed public hearing automatically comply with Metro's public involvement procedures pursuant to the attached checklist.

Ranking and Project Selection Schedule

Information about how projects in each mode will be ranked and other special instructions follow. A summary of the currently adopted technical ranking criteria are enclosed in Attachment 2. The detailed criteria are enclosed at Attachment 3. The current schedule is shown in Attachment 5.

Miscellaneous Process Information

Three points in closing. First, please fashion a simple two or three line project description to be used throughout the ranking process to provide the overall project features and goals. Include this at the top of the more detailed description of project features requested below.

Second, please assure that basic information relevant to the mode of the project is well described (e.g., length of road work, width of sidewalks, medians, parking strip, number of lanes, spacing of pedestrian crossings, etc.); that critical cost factors are not overlooked (e.g., needed bridge crossings, or extensive new drainage requirements) and that adequate contingency funds are included in project budgets.

Finally, please submit reasonable project scopes. Metro will be considering nominations totaling roughly four times the funding that is expected. If a project achieves more than one valid transportation objective, each objective should be nominated as a separate project. Where it is logical to add a secondary improvement to the primary project (e.g., improve a signal secondary to widening a road link), the proposal should make clear the cost of each separable project phase.

Please call TerryWhisler (797-1747) if you have any other questions.

PRIORITIES 2000 PROJECT SOLICITATION FORM

(complete this cover form for each candidate project)

1. Project Title:

2. Lead Agency (i.e., responsible for match):

3. Project Contact:

a. Name _____

b. Title _____

c. Phone _____

d. Fax _____

e. E-mail (if any) _____

f. Mailing Address: _____

_____

4. Project Cost/Requested Funds (PLEASE PROVIDE INFORMATION ON THIS FORM):

	PE	ROW	CONSTRUCTION	TOTAL
Federal				
Local				
Private				
TOTAL				

Note: Standard matching ratio is 0.897 federal/0.103 local and includes all bike and pedestrian projects; TEA-21 High Priority projects are 80/20 match and will be apportioned on the following six year schedule: 15%, 15%, 17%, 17%, 18%, 18% (see Attachment X).

5. Project Description (concise summary for public presentation purposes)

ATTACH FOLLOWING INFORMATION ON 8.5" x 11" SHEETS):

a. Street or Facility, if applicable

b. Termini or project boundaries.

c. Brief physical description of main project features (e.g., length; number and width of lanes, bike lanes and/or sidewalks; bridge crossings; medians; parking strip, etc.)

d. Explain current transportation problem.

e. Explain how nominated project would resolve problem.

f. Describe significant multi-modal project elements.

g. Describe significant unique aspects of project which transcend technical evaluation.

h. Attach 8.5" X 11" vicinity map indicating project and nearest major arterial intersection.

6. Special Instructions: Pedestrian Projects

The Metro model generates two types of pedestrian data of importance: 1) transit mode share (in which walk time *to and from* transit are critical variables for transit attractiveness) and; 2) walk mode share. This data is generated only on a zone basis. In other words, the model cannot estimate effects of any given pedestrian system enhancement on a project specific basis, unless the project effects are so profound that they alter pedestrian associated characteristics of the entire zone. Scoring of pedestrian projects will rely on zone level data, as discussed below. To capture the value of specific projects subjective factors must be described in the application and will play an important role during the administrative assessment process.

Effectiveness (25 points)
The pedestrian effectiveness goal is to reduce VMT by increasing walk trips. The most direct link between walking and VMT reduction - that is dealt with in the model - is walk-to-transit mode share, because this calculation deals with walk time to transit as a very important variable. The effectiveness ranking of pedestrian projects will be based on the model generated walk-to-transit mode share of the zone in which the proposed project is located. The *difference* between the 1994 base year walk-to-transit mode share and the 2020 mode share will be calculated for each zone in which a project is located. Ten points will be awarded on a "high/medium/low" distribution based on the difference in *percent* walk-to-transit mode share between the two years. Fifteen points will be awarded for the difference in total *number* of walk-to-transit trips calculated for the zone.

2040 Factors (40 points)

Insofar as pedestrian trips are generally not greater than ¼ mile, the **2040 Access/Circulation criteria (20 points)** will be awarded based on location of the projects *within* the 2040 high priority uses. Points will be awarded according to the matrix shown in Attachment B. Projects located outside but within 1/8th mile of the targeted land uses, which promote *access,* will also be eligible for maximum points.

The **Mixed Use Index criteria (20 points)** are model generated and evaluate both mixed use and intersection density factors. Fourteen points will be awarded based on the difference between the 1994 base year and 2020 mixed use index value of the project TAZ (or proportional zone averages if a project spans more than one TAZ). Six points will be awarded based on the difference between the 1994 and 2020 intersection density values of the project zone (or zones).

Cost Effectiveness (15 points)
The effectiveness points and the Mixed Use Index points (45 total possible points) will be divided by the total estimated project cost (not the cost of federal funds being requested).

The project with the lowest cost per combined mixed use index and effectiveness point will receive highest cost effectiveness ranking on a low/medium/high spread (i.e., projects with the lowest 1/3rd cost per point = 15 points; medium 1/3rd = 7 points; highest 1/3rd = 0 points.

7. Special Instructions: Bike Projects

Metro (Data Resource Center) will generate all data needed to rank Bike projects once supplied with project alignment information. The proposed methodology will estimate project specific ridership increases for each project. (The trip generation protocol will assume a ½ mile radius around the proposed bike improvement.)

The ridership increase will be translated to VMT reduction. In calculating cost effectiveness, the VMT figure will be factored upward relative to the projected shortfall of bike mode share increase needed to achieve the region's goal of ten percent per capita VMT reduction in the various priority land use types. The greatest shortfalls in descending order are in Regional Centers; the five Central City districts; station areas/corridors/main streets/inner neighborhoods; and industrial areas/employment centers/outer neighborhoods. For example, VMT reduction attributable to a bike project providing access to or circulation within a Regional Center would be increased by a factor of 3.5. This is half the difference between the projected bike mode share increase in Regional Centers in 2015 and that needed to achieve the VMT reduction goal for that land use type. The factored VMT reduction would then be divided by the *total estimated project cost* (i.e., not the amount of *requested federal funds*). In short, a bike trip gained in this location is that much more valuable - relative to the VMT reduction goal - than a trip gained in a location already close to meeting its VMT reduction target.

Bike projects typically address safety and access factors not amenable to technical evaluation. All bike project proposals should take care to clearly articulate special factors for evaluation during the administrative ranking process.

8. Special Instructions: Public Transportation Projects

Standard modeling protocol will be used to determine ridership potential of transit service increase proposals. However, service increases will be divided into core versus suburban emerging markets with effectiveness evaluated for the two categories independently.

9. Special Instructions: Regional TDM/TMA Program Housed at Tri-Met

Tri-Met's Transit Choices for Livability initiative demonstrated a need for up to an estimated 20 transportation management associations (TMAs) throughout the region. Consequently, Metro recently adopted program procedures for establishing regional support for TMAs.

Tri-Met staff of the regional TDM program will administer financing for initial feasibility studies. JPACT and the Metro Council will select the individual TMA organizations to receive three year, decreasing start-up funding (up to $250,000 per TMA). If your jurisdiction is interested in nominating a TMA for regional funding, please provide details of the proposed organizational structure and mission as a candidate project submission. However, direct funding will not be provided as part of the current project selection process. Rather, the degree of interest will be a primary factor in determining the amount of multi-year TMA program set-aside.

10. Special Instructions: TOD Projects

The 20 points normally allocated to safety will, for TOD projects, be allocated on the basis of changes in density of persons per acre within a ¼ mile radius of the project. The sum of total employment and residential population that is generated by the project proposal will be compared against densities that would otherwise be anticipated by current zoning of the project site. Sponsors of TOD projects will need to provide very detailed information about existing development expectations of sites proposed for TOD development relative to expected residential and commercial/retail characteristics (e.g., commercial/retail/residential square footage) that will occur if the site is developed as a TOD. TOD proposals must be clearly connected to high quality transit physically or functionally to qualify for regional funding. Sponsors should expect to coordinate closely with Metro's TOD Program staff (contact Phil Whitmore, 797-1931). Metro will establish baseline demographic data in cooperation with project sponsors. Metro will then work with project sponsors to determine density increases expected as a result of project implementation. Once agreement is reached on these variables, Metro will generate all other data needed to rank the projects.

The Metro model cannot generate project specific changes to mode shift as a basis for computation of VMT reduction. Therefore, the effectiveness points will be based on the increase from 1994 to 2020 within the project zone of non-auto mode shares. The zone percentage difference for walk-to/from-transit, walk and bike mode splits will be tallied. The third of projects located in zones with the highest change will receive 25 points; the middle third 13 points; the lowest third will receive no points. Cost effectiveness will be calculated as total project cost per effectiveness point (i.e., Cost/Points)

11. Special Instructions: Road Modernization Projects

Once provided with alignment and cross section information Metro will generate most all other data needed to rank these projects. Safety information is the exception. Please provide ODOT compiled SPIS data for projects nominations or provide other safety data maintained by your jurisdiction. Please coordinate with Terry Whisler (797-1747) regarding project descriptions.

12. Special Instructions: Freight Projects

Metro will coordinate with PSU to determine the "traded sector" relationship of freight projects. All other data will be model generated. Project descriptions should emphasize qualitative issues not amenable to technical analysis.

13. Boulevard Projects

Boulevard projects were approved as a new modal project category by JPACT and the Metro Council. The technical criteria are enclosed as part of Attachment X. They are quite detailed. Please read them carefully. As this will be the first time for ranking these kinds of projects, please be careful to describe the project elements as described in the criteria as fully as possible. The more fully the project elements are described and related to the goals of the project category, the better your project will rank.

TABLE 1: MTIP/STIP UPDATE 2000 Clean/Revised

OLD AND NEW FUNDING ESTIMATES, PROGRAM COMMITTMENTS & NET AVAILABLE FUNDS

	98	99	00	01	02	03	TOTAL
Programming of Old Estimate							
Estimated STP Funds	8.254	7.972	7.690	7.407	0.000	0.000	31.323
(South/North)	0.000	-1.500	-6.000	-6.000	0.000	0.000	-13.500
(Other STP Programming)	-7.638	-5.384	-3.634	-7.801	0.000	0.000	-24.457
Subtotal STP	**0.616**	**1.088**	**-1.944**	**-6.394**	**0.000**	**0.000**	**-6.634**
Estimated CMAQ	3.174	3.055	2.936	2.816	0.000	0.000	11.981
Programmed CMAQ	-2.619	-3.963	-2.062	-2.180			-10.824
Subtotal CMAQ	**0.555**	**-0.908**	**0.874**	**0.636**	**0.000**	**0.000**	**1.157**
Estimated Enhancement	1.166	1.166	1.166	1.166	0.000	0.000	4.666
Programmed Enhancement	-1.223	-2.276	0.000	0.000			-3.499
Subtotal Enhancement	**-0.057**	**-1.110**	**1.166**	**1.166**	**0.000**	**0.000**	**1.167**
Total Estimated Regional Funds	**12.595**	**12.193**	**11.792**	**11.390**	**0.000**	**0.000**	**47.970**
Approved Programming	-11.480	-13.123	-11.696	-15.981	0.000	0.000	-52.280
Overprogramming of Reg. Flex Funds	**1.115**	**-0.930**	**0.096**	**-4.591**	**0.000**	**0.000**	**-4.310**
ODOT Mod Estimate and Program	23.051	21.734	35.247	0.122	0.000	0.000	80.154
Current Funding Estimate							
Regional STP	11.941	13.811	13.917	14.221	14.461	14.762	83.113
CMAQ	6.739	7.669	7.570	7.824	9.272	9.471	48.545
Enhancement	1.400	1.400	1.400	1.400	1.400	1.400	8.400
ODOT Modernization	23.051	21.734	35.247	0.122	8.560	8.560	97.274
Total Current Funding Estimate	**43.131**	**44.614**	**58.134**	**23.567**	**33.693**	**34.193**	**237.332**
S/N Commitment		-1.500	-6.000	-6.000	-6.000	-6.000	-25.500
Other Prior Programming	-34.531	-33.357	-40.943	-10.103	0.000	0.000	-118.934
UNPROGRAMMED FUNDS	**8.600**	**9.757**	**11.191**	**7.464**	**27.693**	**28.193**	**92.898**

INCREASE BY FUND TYPE TO ALLOCATE

Regional STP	4.303	6.927	4.283	0.420	8.461	8.762	33.156
CMAQ	4.120	3.706	5.508	5.644	9.272	9.471	37.721
Enhancement	0.177	-0.876	1.400	1.400	1.400	1.400	4.901
Total Flex Funds To Allocate	**8.600**	**9.757**	**11.191**	**7.464**	**19.133**	**19.633**	**75.778**
ODOT Modernization	0.000	0.000	0.000	0.000	8.560	8.560	17.120
GRAND TOTAL TO ALLOCATE	**8.600**	**9.757**	**11.191**	**7.464**	**27.693**	**28.193**	**92.898**
TEA-21 High Priority "Ear-Mark" Projects	10.369	10.369	11.751	11.751	12.443	12.443	69.125 *

*excluding S/N earmark.

MTIP/STIP UPDATE 2000

TABLE 2: TEA-21 HIGH PRIORITY PROJECTS AND SCHEDULED AUTHORIZATION

PROJECT	TOTAL	98	99	00	01	02	03
Tri-Met Buses	**3.50**	0.0	3.50	0.0	0.0	0.0	0.0
Ped to MAX (Gresham)	**1.00**	0.15	0.15	0.17	0.17	0.18	0.18
Portland Transit Signal Priority	**4.50**	0.68	0.68	0.77	0.77	0.81	0.81
Lovejoy Ramp	**5.00**	0.75	0.75	0.85	0.85	0.90	0.90
Broadway Bridge	**10.00**	1.50	1.50	1.70	1.70	1.80	1.80
Col. Rv Hwy/60th	**2.00**	0.30	0.30	0.34	0.34	0.36	0.36
So. Rivergate O'Xing	**13.00**	1.95	1.95	2.21	2.21	2.34	2.34
MurrayO'Xing	**3.75**	0.56	0.56	0.64	0.64	0.68	0.68
Tualatin/Sherwood Bypass	**0.38**	0.06	0.06	0.06	0.06	0.07	0.07
I-5/217/Kruse Way Intrchng	**7.00**	1.05	1.05	1.19	1.19	1.26	1.26
I-205/Sunnybrook Intrchng	**19.00**	2.85	2.85	3.23	3.23	3.42	3.42
Funds at 100% of Authorization	**69.13**	9.84	13.34	11.16	11.16	11.81	11.81
Funds at 90% of Authorization	**65.06**	8.86	12.36	10.04	10.04	10.63	10.63
Difference*	**4.06**	0.98	0.98	1.12	1.12	1.18	1.18

*To obtain 100% of project funding within 6-year authorization, obligation limitationof these amountsmust be "borrowed" from discretionary funds.

ATTACHMENT 2

FY 2000 MTIP PROJECT RANKING TECHNICAL CRITERIA

8/28/98

ROAD MODERNIZATION	ROAD RECONSTRUCTION	BLVD. DESIGN	FREIGHT	PEDESTRIAN	BICYCLE	TOD	TRANSIT	TDM
GOAL: Address 2040 Land Use Objectives (40 points)	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**	**GOAL: Address 2040 Land Use Objectives (40 points)**
GOAL: Provide Mobility at Reasonable Cost (15 points) Cost/VHD eliminated in 2020 with truck delay factored to auto equivalent value.	**GOAL: Provide Mobility at Reasonable Cost (15 points)** Cost/VMT in 2020 (or VT at interchanges and intersections.	**GOAL: Implement Blvd Design Elements for Least Cost. (15 points)** Cost/mile/benefit points	**GOAL: Provide Mobility at Reasonable Cost (15 points)** Cost/Truck hours of delay eliminated in 2020.	**GOAL: Provide Mobility at Reasonable Cost (15 points)** Cost/VMT reduced in 2020.	**GOAL: Provide Mobility at Reasonable Cost (15 points)** Cost/(VMT · ratio of '94 to 2020 mode splits in priority land uses needed to achieve 10% VMT reduction)/by miles.	**GOAL: Reduce VMT at Reasonable Cost (15 points)** Cost/VMT reduced in 2020.	**GOAL: Increase Ridership at Reasonable Cost (25 points)** Determine cost per new transit patron.	**GOAL: Reduce VMT at Reasonable Cost (25 points)** Cost/VMT reduced.
GOAL: Reduce Congestion (25 points) Project derives from CMS, consistent with 10% per capita VMT reduction. Compare base year V/C ratio (pm peak hr & direction) against ratios with and without project.	**GOAL: Bring Facility To Current Urban Standard Or Provide Long-term Maintenance (25 points)** Reward pavement condition that is currently "fair" and will be "poor" 10 years into future.	**GOAL: Slow vehicle speeds/enhance alt. mode access. (25 points)** Encourage projects that incorporate maximum feasible Blvd street design elements so alternative travel modes are appealing & safer.	**GOAL: Reduce Delay of Freight & Goods Movement In and Through the Region (25 points)** Truck hours of delay eliminated in 2020.	**GOAL: Increase Walk Mode Share/Reduce Auto Trips (25 points)** Compute new trips made by walking (or walking to transit) instead of by auto. Use 2020 mode split after reducing VMT 10%.	**GOAL: Ridership (25 points)** Determine potential ridership increase based on travel shed, socio-economic data and travel behavior survey data. Current methods assume 2020 mode splits adjusted to reflect 10% VMT reduction.	**GOAL: Increase Non-Auto Mode Share (25 points)** Determine increase of transit, walk and bike trips that result from TOD program subsidy of market development.	**GOAL: Increase Modal Share (35 points)** Compute benefits in relation to 2020 ridership targets in areas proposed for service additions.	**GOAL: Increase Modal Share (35 points)** Compute non-SOV mode share increase and VMT reduction.
GOAL: Safety (20 points) Accident rate per Vehicle (use current ODOT Accident Rate Book) and qualitative assessment of bike/ped conflicts.	**GOAL: Safety (20 points)** Accident Rate per Vehicle (use current ODOT Accident Rate Book) and qualitative assessment of bike/ped conflicts.	**GOAL: Safety (20 points)** Target least safe/highest non-auto demand boulevard segments for improvement.	**GOAL: Safety (20 points)** Addresses high accident locations with special emphasis on hazardous road/rail situations and conflict with bike/pedestrian modes.	**GOAL: Safety (20 points)** Project corrects an existing safety problem. Factors such as traffic volume, speed, road width, citizen complaints, and especially proximity to schools will be considered in determining critical safety problems.	**GOAL: Safety (20 points)** Factors include blind curves, high truck & auto volume, soft shoulders, high reported accident rate, high speeds and especially proximity to schools.	**GOAL: Increase Density (20 points)** Does the TOD project increase density within a one-quarter mile radius of transit above the level that would result without public subsidy from the TOD program?		

h:\..\terry\00tip\00multi mode criteria Revised by JPACT 7/16/98
7\22\98

ATTACHMENT 1

FY 2000 MTIP/STIP PROJECT SELECTION PROCESS

Available Revenue →

STEP 1: PROJECT APPLICATION BY STATE, REGIONAL AND LOCAL JURISDICTIONS

↓

STEP 2: THRESHOLD CRITERIA

- Þ Meet Street Design Guidelines
- Þ Consistent With RTP Functional Classification Maps
- Þ To Be Included in RTP "Strategic" Component
- Þ Cost of Candidate Projects Constrained to Target of 3 Times Expected Revenue

↓

STEP 3: TECHNICAL SCORE IS CALCULATED

FREIGHT	ROAD MOD	RECONSTRUCTION	BLVD. DESIGN	PEDESTRIAN	BICYCLE	TOD	TRANSIT	TDM
GOAL: Support 2040 1. Increase Access to/ Circulation Within Industrial Areas -- 20 Points 2. Increase of Industrial Jobs , *or* High focus on "Traded Sector" businesses. -- 20 Points	***SUPPORT 2040:*** 1. INCREASE ACCESS TO OR CIRCULATION WITHIN DESIGNATED 2040 PRIORITY LAND USES -- **20 POINTS** 2. SERVES AREAS WHERE 2040 GROWTH CONCEPT CALLS FOR INCREASED MIXED USE DENSITY -- **20 POINTS**							
GOAL: Mobility at Reasonable Cost (15 points) Cost/Truck hours of delay reduced.	GOAL: Mobility at Reasonable Cost (15 points) Cost/VHD reduced.	GOAL: Mobility at Reasonable Cost (15 points) Cost/VMT.	GOAL: Implement Blvd Design Elements for Least Cost. (15 points) Cost/mile/benefit points	GOAL: Mobility at Reasonable Cost (15 points) Cost/VMT reduced.	GOAL: Mobility at Reasonable Cost (15 points) Cost/VMT reduced.	GOAL: Reduce VMT at Reasonable Cost (15 points) Cost/VMT reduced.	GOAL: Increase Ridership at Reasonable Cost (25 points) Cost per new patron.	GOAL: Reduce VMT at Reasonable Cost (25 points) Cost/VMT reduced.
GOAL: Reduce Delay of Freight & Goods Movement Delay (25 points) Truck hours of delay elirninated.	GOAL: Reduce Congestion (25 points) Reduce V/C ratio/Improve LOS.	GOAL: Upgrade To Urban Standard; Provide Long-term Maintenance (25 points) Maintain "Fair" pavement condition.	GOAL: Slow vehicle speeds/enhance alt. mode access. (25 points) Encourage Blvd street design elements.	GOAL: Increase Walk Trips/Re-duce Auto Trips (25 points) Generate new walk trips.	GOAL: Ridership (25 points) Generate new ridership.	GOAL: Increase Non-Auto Mode Share (25 points) Increase Non-SOV trips.	GOAL: Increase Modal Share (35 points) Increase Transit Trips. Compare "Core" vs "Emerging" systems separately.	GOAL: Increase Modal Share (35 points) Decrease SOV mode share.
GOAL: Safety (20 points) Reduce road/rail conflict and truck conflict with bike/pedestrian modes.	GOAL: Safety (20 points) Improve high accident locations.	GOAL: Safety (20 points) Improve high accident rate locations.	GOAL: Safety (20 points) Slow vehicles & enhance street scape to promote alt. mode safety.	GOAL: Safety (20 points) Reduce pedestrian hazards.	GOAL: Safety (20 points) Reduce bike hazards, especially near schools.	GOAL: Increase Density (20 points) Increase mixed use density.		
100 Points	100 Points	100 Points	100 Points	100 Points	100 Points	100 Points	100 Points	100 Points

↓

RESULTS OF STEP 3: PROJECT LIST IS RANKED BY TECHNICAL SCORE

FREIGHT	ROAD MOD	RECONSTRUCTION	BLVD. DESIGN	PEDESTRIAN	BICYCLE	TOD	TRANSIT	TDM
Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100	Proj. 1 - 100
Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97	Proj. 2 - 97
Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88	Proj. 3 - 88
Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73	Proj. 4 - 73

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STEP 4: ADDTIONAL INFORMATION ADDED THROUGH ADMINISTRATIVE CRITERIA

- Þ Is the candidate project the minimum logical phase?
- Þ Is the project linked to another high priority project?
- Þ Is there local or private over-match?
- Þ Is there a past regional commitment?
- Þ Does the project include significant multi-modal benefits?
- Þ Is there an affordable housing connection?
- Þ What other factors are not reflected by the technical criteria?

FUNDING AMOUNT AVAILABLE
BY STATE MOD, STP, CMAQ, TE, NHS, etc.

→ ↓ ←

ALLOCATION CRITERIA
- Þ Multi-Modal Program
- Þ Geographic Equity
- Þ Support 2040 Objectives
- Þ Meets Air Quality Test

STEP 5: DRAFT FUNDING RECOMMENDATION FOR PUBLIC HEARING AND CONSIDERATION BY JPACT AND THE METRO COUNCIL

PROJECT EVALUATION

PROJECT SELECTION

☐ Exhibit 3: Detailed Technical Project Selection Criteria

Transportation Measures

- Pedestrian
- Transit Oriented Development
- Bicycle
- Road Modernization
- Road Reconstruction
- Transit
- Freight
- Transportation Demand Management (TDM)
- Boulevard Projects

Land Use Support Measures

- 2040 Funding Priority Matrix (Attachment B-1: Applicable to all modes except freight)
- 2040 Freight Funding Priority Matrix

Pedestrian System

GOAL: Increase Modal Share/Reduce Auto VMT (25 points)

VMT reduction potential for pedestrian projects will be inferred on the basis of zone walk-to-transit values generated by the Metro regional model. The following factors will be used to rank pedestrian project effectiveness.

> *Note: For CMAQ eligibility purposes, total person trips within a 1/8th mile radius of the project will be calculated and zonal mode shift factors will be used to estimate walk reduction potential of projects and corresponding reduction of VMT and emissions.*

Project is located in a zone with a high increase in the number of walk-to-transit mode share between 1994 and 2020. (15 Points)

Points	
15	High
8	Medium
0	Low

Project is located in zone with a high increase in the percent of walk-to-transit trips between 1994 and 2020. (10 Points)

Points	
10	Large increase
5	Moderate increase
0	Low increase

GOAL: Safety (20 points)

Project corrects an existing safety problem. Very wide roads with fast moving traffic make crossing difficult and dangerous. Factors such as traffic volume, speed, road width, proximity to schools, and citizen complaints will be considered in determining critical safety problems.

Points	
20	Project will correct an extremely hazardous situation which needs immediate attention.
13	Project will correct an unsafe situation.
0	Project will provide little or no safety improvement.

GOAL: Addresses 2040 Land Use Objectives (40 points)

See Funding Priority Matrix. **(Attachment B-1)**

GOAL: Provide Mobility at Reasonable Cost (15 points)

Add effectiveness and 2040 mixed use density points (maximum of 45 points). Divide sum of points by total project cost.

Points	
15	Low Cost/point
8	Moderate Cost/point
0	High Cost/point

TOD

GOAL: Increase Mode Share (25 points)

Is the TOD project proposed in a zone with a high increase in the percent of walk-to-transit, bike, and walk trips between 1994 and 2020.

Note: For CMAQ eligibility purposes, total person trips generated by the TOD project will be calculated using standard ITE trip factors. Zonal mode shift percent change 1994/2020 will be used to estimate walk reduction potential of projects and corresponding reduction of VMT and emissions.

Points	
25	High
13	Medium
0	Low

GOAL: Density Criteria (20 points)

Does the TOD project increase the density of land uses within a one-fourth mile radius of transit above the level that would result without these public funds into the TOD project?

Points	
20	High - 50 percent or greater increase in persons per acre within a one-fourth mile radius.
10	Medium - 25 percent or greater increase in persons per acre within a one-fourth mile radius.
0	Low - less than 25 percent increase in persons per acre with a one-fourth mile radius.

GOAL: 2040 Criteria(40 points)

See Funding Priority Matrix. **(Attachment B-1)**

GOAL: Cost-Effectiveness Criteria (15 points)

Cost per effectiveness points.

Points	
15	Low cost/point
8	Medium cost/points
0	High cost/point

Bike

GOAL: Ridership (Usage) (25 points)

Ridership (Usage) (25 points)
Calculate the project's potential ridership based on a travel shed of ½ mile radius from the proposed project. The 2020 model generated distribution of bike trips occurring within the travel shed will be concentrated onto newly proposed bike facilities. Resultant "ridership" values will be compared for all bike projects.

Note: For CMAQ eligibility purposes, total person trips within a 1/8th mile radius of the project will be calculated and zonal mode shift factors will be used to estimate walk reduction potential of projects and corresponding reduction of VMT and emissions.

Points	
25	High ridership
13	Medium ridership
0	Low ridership

GOAL: Safety (20 points)
Does the project address an existing deterrent to bicycling?

Target roadway a deterrent to bicycling.

Points	
15	High auto ADT and narrow
8	High auto ADT and wide
0	Low auto ADT; narrow & curves

Other safety factors (blind curves, high truck volume, soft shoulders, high reported accident rate).

Points	
5	Yes
0	No

GOAL: Address 2040 Land Use Objectives (40 points)

See regional and local bikeway rows on *2040 Transportation Prioritization Criteria* Matrix. **(Attachment B-1)**

Points	
40	High
20	Medium
0	Low

GOAL: Cost Effectiveness (15 points)

Determine cost per rider. (use concentrated 2020 ridership value)

Points	
15	Low cost/rider
8	Medium cost/rider
0	High cost/rider

Roadway Expansion

GOAL: Reduce Congestion (25 points)
(Project derives from CMS, consistent with 2020 per capita VMT targets)

1994 two-hour "blended" V/C Ratio (pm, peak direction) **2020 V/C Ratio** (pm peak hr & direction)
(Central City, Regional Centers, Town Centers, Main Streets, Station Areas)

Points		Points	
15	>1.1	10	>1.1
8	>1.0	5	>1.0
0	<1.0	0	<1.0

1994 two-hour "blended" V/C Ratio (pm, peak direction) **2020 V/C Ratio** (pm peak hr & direction)
(Corridors, Industrial Areas, and Inner and Outer Neighborhoods)

Points		Points	
15	>1.0	10	>1.0
8	>0.95	5	>0.95
0	<0.95	0	<0.95

Note: Regional Highways to be determined on case by case basis.

GOAL: Enhance Safety (20 points)
Accident Rate per Vehicle Mile (Use 1990 ODOT Accident Rate Book); per vehicle for intersections.

Points	
20	>124% Statewide Median
10	100% Statewide Median
0	<100% Statewide Median

GOAL: Addresses 2040 Land Use Objectives (40 points)

See Funding Priority Matrix. **(Attachment B-1)**

GOAL: Provide Mobility at a Reasonable Cost (15 points)

Cost per Vehicle hours of delay (VHD) eliminated in 2020: VHD = 2020 No-Build VHD - Build VHD

Points	
15	Top 1/3
8	Mid 1/3
0	Low 1/3

Roadway Reconstruction

GOAL: Project brings facility to current urban design standard or provides long-term maintenance (25 points)

1994 Condition: pavement base, etc. from ODOT

Points	
15	Fair
8	Poor
0	Very Poor

2004 Condition: pavement, base, etc. (without earlier improvement)

Points	
0	Fair
5	Poor
10	Very Poor

GOAL: Enhance Safety (20 points)

Accident Rate Per Vehicle Mile (Use 1990 ODOT Accident Rate Book)

Points	
20	>124% Statewide Median
10	100% Statewide Median
0	<100% Statewide Median

GOAL: Addresses 2040 Land Use Objectives (40 points)

See Funding Priority Matrix. **(Attachment B-1)**

GOAL: Provide Mobility at Reasonable Cost (15 points)

Cost per year 2020 VMT (or Vehicles Traveled at interchanges & intersections)

Cost/Year 2020 Vehicles or VMT

Intersections/Interchanges Points		Interstate Projects Points		Link Improvement Points	
15	<$.51 per vehicle	15	<$.51 per vehicle	15	<$.33/VMT
8	$.51-.99 per vehicle	8	$.51-.99 per vehicle	8	$.24-$.99 VMT
0	>$1.00 per vehicle	0	>$1.00 per vehicle	0	>$.99/VMT

- Note: To be updated to current costs or will assign points for low, medium and high cost.

Transit

GOAL: Increase Modal Share (35 points)

Formula:
Subtract
2020 transit target
- 1994 ridership
Multiply Remainder
x Percent attributed to project
x Average regional trip length
= VMT Reduction

Points	
35	High VMT Reduction
17	Medium VMT Reduction
0	Low VMT Reduction

Note: Service increase proposals will be split as urban core or suburban new start and ranked separately.

GOAL: Address 2040 Land Use Objectives (40 points)

See Funding Priority Matrix. **(Attachment B-1)**

GOAL: Provide Cost Effective Improvements (25 points)

Cost/New Ridership
(Factored 2020 ridership increase)

Points	
25	Low Cost
12	Medium cost
0	High cost

Freight Intermodal

GOAL: Reduce Truck Hours of Delay (25 points)
Determine Truck hours of Delay on target facility in 2020 with and without the project.

Hours of Delay Eliminated Points	
25	High
13	Medium
0	Low

GOAL: Enhance Safety (20 points)

Points	
8	Reduces conflicts for freight modes (especially with bicycles and pedestrians)
8	Addresses hazardous road/rail geometric problem for truck/train
4	Addresses location with high accident rate

GOAL: Addresses 2040 Land Use Objectives (40 points)

See 2040 Freight Table. **(Attachment B-1)**

GOAL: Provide Freight Mobility at Reasonable Cost (15 points)

Cost per VHD eliminated in 2015: Cost/Year 2020 (No-Build VHD - Build VHD)

Points	
15	Low cost/VHD
8	Mid cost/VHD
0	High cost/VHD

TDM

GOAL: Increase Modal Share (35 points)

Mode share increase for (transit, bike, walk, shared-ride) or elimination of trip. Use Regional TDM program survey data to estimate SOV mode shift potential of proposed projects.

Points	
35	High
17	Medium
0	Low

GOAL: Addresses 2040 Land Use Objectives (40 points)

(See Funding Priority Matrix for specific land uses.) **(Attachment B-1)**

Points	
40	Project is a regional strategy

GOAL: Cost Effectiveness (25 points)

Cost/VMT reduced

Points	
25	Low cost
13	Medium cost
0	High cost

BOULEVARD DESIGN
TECHNICAL CRITERIA

I. 2040 IMPLEMENTATION

Goal: Support implementation of 2040 priority land uses. (40 points)

See 2040 Criteria at end.

II. EFFECTIVENESS

1. Goal: Implement design elements that will help to reduce automobile speeds along boulevard segments, with a goal of reducing speeds to 25 miles per hour, or less. (10 points)

1.	Current lane widths are narrowed?	Yes ☐	No ☐
2.	Curb extensions/"squeeze points" are constructed?	Yes ☐	No ☐
3.	On-street parking is permitted?	Yes ☐	No ☐
4.	Corner turn radii are engineered for slower turn movements?	Yes ☐	No ☐
5.	Pedestrian crossings are increased	Yes ☐	No ☐
6.	Pedestrian crossings are demarcated with distinct texture/color/platform treatment?	Yes ☐	No ☐
7.	Signals re-timed to progress at slower than current speeds?	Yes ☐	No ☐
8.	Travel or turn lanes are eliminated?	Yes ☐	No ☐
9.	Other element? (relate to street design guidelines).	Yes ☐	No ☐

Scoring:

4+ design elements	*10 points*
3 design elements	*7 points*
2 design element	*3 points*
1 design element	*0 points*

2. Goal: Implement appropriate design elements to enhance alternative modes of travel along Boulevard segments.

a. Sidewalks will be widened. (5 points) Yes ☐ No ☐

Ranking Objective: Achieve optimum sidewalk width of at least 10 feet on all boulevards. Points are reallocated to other criteria where existing sidewalk width is greater than or equal to ten feet.

Proposed Methodology: candidate projects that are constrained by narrow right of way may obtain full 5 points upon demonstration that all practical means are employed to maximize sidewalk widths including:

narrowing travel lanes and center median, elimination of on-street parking on one or both sides of the street and transfer of bike facilities to parallel facility.

b. Additional Enhancements. (10 points)

1.	Are transit amenities provided?	Yes ☐ No ☐
2.	Is a landscape buffer provided?	Yes ☐ No ☐
3.	Are pedestrian refuges(curb extensions)installed at crossings?	Yes ☐ No ☐
4.	Is a raised pedestrian refuge in a median installed?	Yes ☐ No ☐
5.	Are bike lanes added (on or parallel to facility)?	Yes ☐ No ☐
6.	Are obstructions (e.g., utilities) removed from the primary pedestrian-way?	Yes ☐ No ☐
7.	Are street amenities provided? (e.g., benches, pedestrian scale decorative lights, railings, statuary, brick pavers, etc.)	Yes ☐ No ☐
8.	Other Factors? (relate to street design guidelines)	Yes ☐ No ☐

Scoring:

4+ elements	*10 points*
3 elements	*7 points*
2 elements	*3 points*
1 element	*0 points*

III. COST EFFECTIVENESS

Goal: Implement maximum feasible, highest priority boulevard design elements at lowest cost. (15 points)

Ranking Objective: Determine project cost per mile and divide result by sum of effectiveness points.

Example:

1. ¼ mile of improvement @ $100,000 = $400,000/mile of improvement.
2. Effectiveness points = $20,000 per "cost/effectiveness" point.
3. Allocate 15/7/0 points to low/medium/high-cost thirds.

IV. SAFETY

Goal: **Enhance safety of alternative modes within Boulevard design classifications that are most hazardous, especially to pedestrian travel, through design elements that reduce speed of motor vehicles, increase driver awareness of non-motorized traffic, and promote higher density, mixed use development.**

a) Ranking Objective: assess existing characteristics of motor vehicle right of way. Identify existence of features listed below which pose greatest hazard to alternative travel modes. Project proposal should specify corrections which should benefit alternative travel modes rather than restrict them. ***(10 points)***

Project includes actions to correct the following safety problems:

1. 5 lanes	Yes ☐	No ☐
2. 12 ft lane width, or greater	Yes ☐	No ☐
3. speed > 40 mph (noon/off-peak)	Yes ☐	No ☐
4. no pedestrian refuge	Yes ☐	No ☐
5. more than 330 feet between marked pedestrian crossings	Yes ☐	No ☐
6. poor vertical delineation of pedestrian-way (e.g., no curb, intermittent curb, numerous driveways, substandard width, occluded by utility infrastructure, etc.).	Yes ☐	No ☐
7. Other considerations (e.g., SPIS data; high incidence of pedestrian/bicycle injuries, etc.)	Yes ☐	No ☐

Scoring:

5+ elements	*10 points*
4 elements	*7 points*
3 elements	*3 points*
2 elements	*0 points*

b) Ranking Objective: Identify land use factors (other than expected increased of mixed use density) which promote/compel pedestrian/bike travel within the corridor. ***(10 points)***

1. **Transit corridor (4 points)**
2. **Regional bike system (3 points)**
3. **Within ¼ mile of a school, civic complex or cultural facilities (3 points)**

ATTACHMENT B-1

FY 2000 MTIP 2040 POINT ALLOCATION

		Points		
1. Access To:	**Is a high proportion of travel on the project link seeking access to:**	**Hi**	**Med**	**Lo**
	· Central City, Regional Centers, Industrial Sanctuaries, Intermodal Terminals	20	15	10
	· Station Areas, Town Centers, Main Streets, Corridors	15	10	5
	· Employment Areas, Inner and Outer Neighborhoods	5	0	0
	OR			
2. Circulation Within:	**Does a project improve mode appropriate circulation within:**			
	· Central City, Regional Centers, Industrial Sanctuaries, Intermodal Terminals	20	15	10
	· Station Areas, Town Centers, Main Streets, Inner Neighborhoods	15	10	5
	· Employment Areas, Inner and Outer Neighborhoods	5	0	0
	AND			
3. 2040 Target Density:	**Does the project serve an area projected in the 2040 Growth Concept to have a large increase of mixed use development between 1994 and 2020?**			
	Change in Mixed Use Density 1994 to 2020: High	20		
	Med	10		
	Low	0		

6/30/98

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FY 2000 MTIP 2040 POINT ALLOCATION FOR FREIGHT

		Points		
1. Access To:	**Is the project located within Industrial Areas, Intermodal Facilities, Employment Areas:**	H	M	L
	· Intermodal rail yard, marine terminal, air cargo facility, truck terminal or distribution facility	20	15	10
	· Industrial Area	15	10	5
	· Employment Areas with other industrial activity	10	5	0
	· outside industrial area but providing access to	10	5	0
	OR			
2. Circulation Within:	**Does a project improve mode appropriate circulation within:**	H	M	L
	· Intermodal rail yard, marine terminal, air cargo facility, truck terminal or distribution facility	20	15	10
	· Industrial Area	15	10	5
	· Employment Areas with other industrial activity	10	5	0
	AND			
3. Employment Growth or Traded Sector Focus	Does the project serve an area projected in the 2040 Growth Concept to have high growth of industrial employment between 1994 and 2020, or exhibit a high current focus on "traded sector" businesses?	High	10	
		Med	5	
		Low	0	

7/22/98 -- Revised by JPACT 7/22/98

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ATTACHMENT 4

Local Public Involvement Checklist

Local jurisdictions/project sponsors must complete this checklist for local transportation plans and programs from which projects are drawn that are submitted to Metro for regional funding or other action. Section 3.D of Metro's local public involvement policy for transportation describes the certification process, including completion of this checklist. See Section 3.D for information about the other certification steps.

If projects are from the same local transportation plan and/or program, only one checklist need be submitted for those projects. For projects not in the local plan and/or program, the local jurisdiction should complete a checklist fc each project.

The procedures for local public involvement (Section 3) and this checklist are intended to ensure that the local planning and programming process has provided adequate opportunity for public involvement prior to action by Metrc To aid in its review of local plans, programs and projects, Metro is requesting information on applicable local public involvement activities. Project sponsors should keep information (such as that identified in italics) on their public involvement program on file in case of a dispute.

A. Checklist

☐ 1. At the beginning of the transportation plan or program, a public involvement program was developed and applied that met the breadth and scope of the plan/program. Public participation was broad-based, with early and continuing opportunities throughout the plan/program's lifetime.

Keep copy of applicable public involvement plan and/or procedures.

☐ 2. Appropriate interested and affected groups were identified and the list was updated as needed.

Maintain list of interested and affected parties.

☐ 3. Announced the initiation of the plan/program and solicited initial input. If the plan/program schedule allowed, neighborhood associations, citizen planning organizations and other interest groups were notified 45 calendar days prior to (1) the public meeting or other activity used to kick off public involvement for the plan/program; and (2) the initial decision on the scope and alternatives to be studied.

Keep descriptions of initial opportunities to involve the public and to announce the project's initiation. Keep descriptions of the tools or strategies used to attract interest and obtain initial input.

☐ 4. Provided reasonable notification of key decision points and opportunities for public involvement in the planning and programming process. Neighborhood associations, citizen planning organizations and other interest groups were notified as early as possible.

Keep examples of how the public was notified of key decision points and public involvement opportunities, including notices and dated examples. For announcements sent by mail, document number of persons/groups on mailing list.

☐ 5. Provided a forum for timely, accessible input throughout the lifetime of the plan/program.

Keep descriptions of opportunities for ongoing public involvement in the plan/program, including citizen advisory committees. For key public meetings, this includes the date, location and attendance.

☐ 6. Provided opportunity for input in reviewing screening and prioritizing criteria.

Keep descriptions of opportunities for public involvement in reviewing screening and prioritizing criteria. For key public meetings, this includes the date, location and attendance. For surveys, this includes the number received.

☐ 7. Provided opportunity for review/comment on staff recommendations.

Keep descriptions of opportunities for public review of staff recommendations. For key public meetings, this includes the date, location and attendance. For surveys, this includes the number received.

☐ 8. Considered and responded to public comments and questions. As appropriate, the draft documents and/or recommendations were revised based on public input.

Keep record of comments received and response provided.

☐ 9. Provided adequate notification of final adoption of the plan or program. If the plan or program's schedule allows, the local jurisdiction should notify neighborhood associations, citizen participation organizations and other interest groups 45 calendar days prior to the adoption date. A follow-up notice should be distributed prior to the event to provide more detailed information.

Keep descriptions of the notifications, including dated examples. For announcements sent by mail, keep descriptions and include number of persons/groups on mailing list.

B. Certification Statement

_____

Project sponsor

Certifies adherence to the local public involvement procedures developed to enhance public participation.

_____

Signed

_____

Date

C. Summary of Local Public Involvement Process

Please attach a summary (maximum two pages) of the key elements of the public involvement process for this plan, program or group of projects.

ATTACHMENT 5

METRO

2000-2003 MTIP/STIP
"Priorities 2000"
KEY MILESTONES
(Revised August 28, 1998)

Milestones

The following identifies milestones related to the next TIP update for the years 2000-2003. The purpose is to provide local jurisdictions with a continuing notice of possible key dates in the proposed schedule. All dates are subject to change. Please call the Metro Hotline at 797-1900 for updated times and dates for hearings and meetings.

	Metro Flexible Program	ODOT Highway Program
May 19, 1998	Public Notification to Kick-Off Process	
June 1998	JPACT Release of Draft Resolution on Criteria	
July 7, 1998	Public Hearing on Criteria	
August 13, 1998	JPACT Action on Criteria	
August 13, 1998	Full Metro Council Action on Criteria	
August/September, 1998		OTC Direction on Program Size
September/October 1998	Project Solicitation/develop local programs	Identify Candidate Highway Projects
September, 1998	Trans Fair/Westside Opening - Public Info on TIP (no action)	
September/October, 1998		Technical Ranking
October/November, 1998	Rank Projects	
December, 1998	Release Technical Ranking	Distribute Draft STIP (including Flex Program Technical Ranking only)
January, 1999	Joint ODOT/Metro Open-house and listening posts	Joint ODOT/Metro Open-house and listening posts
February, 1999	Distribute Recommended Flex Program; TPAC review	
March, 1999	Public Hearings and JPACT/Metro Council Adoption	
Spring/Summer	Conformity	Conformity/OTC/USDOT Approval if Joint STIP/MTIP

MH

Updated version -- handout @ mtg.

Key Ozone Dates for the Portland/Vancouver Area

- March 1978 - Designated Nonattainment Area for Ozone.
- November 1993 - Portland area demonstrates attainment by Clean Air Act Deadline.
- April 1997 - Redesignated to Maintenance Area for Ozone.
- June 1998 - "Old" 1-Hour Ozone Standard revoked.
- July 2000 - EPA to make new nonattainment designations, using 1997-99 monitoring data.

EPA's Revised Ozone Standard

Old 1-Hour Standard	*New 8-Hour Standard*
• 0.12 ppm	• 0.08 ppm
• Rounded up to 0.125	• Rounded up to 0.085
• Highest level	• 4th highest level each year, averaged over 3 years.
• No more than 1 exceedance per year averaged over 3 years	• On a site x site basis
• On a site x site basis	

Recent 8-hr Ozone Levels at Carus Site (in ppm)

YEAR	4th HIGH	3-YR AVE.	>1-HR STD?
1991	0.075	**0.092**	yes
1992	0.095	0.078	yes
1993	0.063	0.079	
1994	0.079	0.072	
1995	0.074	- 0.084	
1996	0.099	0.079	yes
• 1997	0.063	0.081	
• 1998	0.082*	0.085	yes
• 1999	0.110 ? →	-	

- Years EPA to use for compliance with 8-hr standard

* thru 9/9/98

1998 Ozone Levels and Clean Air Action Days

DATE	CAAD CALLED?	ACTUAL HI TEMP	8-HR AVE. (IN PPM)
7/23	Yes	82°	0.028
7/26	No	99°	0.117
7/27	Yes	99°	0.086
7/28	Yes	101°	0.098
8/3	Yes	92°	0.080
8/13	Yes	94°	0.068
8/31	Yes	98°	0.080
9/1	Yes	93°	0.082 < 4th high
9/2	Yes	89°	0.030

Portland/Vancouver Ozone Contingency Plan

- Phase I of Contingency Plan triggered by two recent ozone exceedances in Portland (at Carus monitoring site).
- Requires DEQ to review implementation and effectiveness of ozone control strategies.
- Review now underway-- not known if additional strategies will be needed at this time. Review completion in October.
- Also re-evaluating the "two-exceedance triggering" requirement - was based on "old" 1-hr standard not "new" 8-hr standard.

FROM ISTEA TO TEA-21: THE NEW TRANSPORTATION LAW

The Washington County Department of Land Use and Transportation
is presenting A Satellite Broadcast sponsored by the
National Association of Counties (NACo),
broadcast from Washington, DC.

When Does It Occur? September 23, from 10 A.M. - 12 P.M.
Pacific Daylight Time.

Where Does It Occur? Shirley Huffman Auditorium
Washington County Public Services Building
155 North First Avenue @ Main Street
(See Directions to site via the Westside Light Rail below!)

What is It? This is a satellite broadcast program featuring key players from Federal, state, and county governments. Questions will be answered on air. It will include the following topics:

The Law Explained

- What's in TEA-21?
- Changes in Rural Planning Provisions
- How Does It Differ From ISTEA?
- Programs with More Highway Funds
- How to Work with Governors and State DOTs
- Getting Funds for a Transit System
- Welfare-to-Work Component
- Added Flexibility/ New Requirements

Programs That Work

- Counties That Have Made the Federal Highway and Transit Programs Work for Them.
- Counties That Work Well With Their States and Receive a Fair Share of Federal Transportation Funds

Who Should Attend?

Any county or other local official or employee dealing with transportation issues, such as •elected or appointed officials •urban and rural planners •transportation managers •county engineers •public works officials •interested citizens.

How Do I Register? Call Mary Jamieson at 503-681-3677
(Washington County Department of Land Use and Transportation)

Suggestion: *Why not take the Westside Light Rail to Hillsboro? Ride the Max to Hillsboro. Exit at the Hatfield Government Station. Cross over Main Street and enter the Public Services Building through the Main Street Entrance.*

JPACT Freight Tour
Thursday, September 24, 1998
7:30 am to 1:00 pm

Tour Objective:

To better understand goods movement in our region and the role of freight in the regional economy. The tour will focus on food products as an industry surrogate for goods movement in high tech, manufacturing, wood products and other industrial sectors.

Itinerary:

- Leave Metro Regional Center at 7:30 AM
- Follow the goods movement cycle for a typical food product
  - Review the food processing stage with a tour at Reser's in Washington County
  - Review the warehousing/distribution stage with a tour of Albertson's warehouse at 181st/I-84
  - Review the retail grocery stage through the store's loading docks
- Complete the tour at Terminal 6 with a presentation by Port of Portland's Executive Director, Mike Thorne
- Return to Metro by 1:00 PM

Other Speakers/Information:

In addition to the speakers from the food products industry, speakers from other industry sectors will explain the process from raw product to final consumption, how it differs and how it is similar to food products process.

Media:

Metro will send a press release of the event and encourage media coverage.

Coffee and Lunch will be provided.

For more information, contact Chris Deffebach at Metro, 797-1921. A detailed itinerary will be sent to JPACT members prior to the tour.

U.S. Department
of Transportation
**Federal Transit
Administration**

Administrator

400 Seventh St., S.W.
Washington, D.C. 20590

August 1998

Dear Colleague:

All of us in the transit community are celebrating the victory of the passage of the landmark legislation which will carry us into the new millennium! Now that President Clinton has signed the law, we are preparing to implement TEA-21, the Transportation Equity Act for the 21st Century.

Outreach listening sessions have been scheduled to consult with our partners and our customers before TEA-21's implementation. Please accept my personal invitation to you, and the members of your organization, to join us at the most convenient day-long session.

Dallas, TX **Wednesday, Sept. 9**	**Kansas City, MO** **Tuesday, Sept. 22**
Portland, OR **Monday, Sept. 14**	**Chicago, IL** **Wednesday, Sept. 23**
San Francisco, CA **Tuesday, Sept. 15**	**Philadelphia, PA** **Friday, Oct. 2**
Atlanta, GA **Wednesday, Sept. 16**	**New York, NY** **Thursday, Oct. 8**

Multi Consultants Associates, Inc., (MCA) is responsible for session logistics; a registration packet is enclosed for your use. You may contact Ms. Paula Nesmith of the MCA staff at (301) 565-4020 with any registration questions. Since the American Public Transit Association (APTA) is handling the October 8 session immediately following their Annual Conference in New York City, registration information for that session only should be directed to the APTA Meetings Department at (202) 898-4074/38. TEA-21 FTA program issues should be directed to your FTA Regional Office. Space is limited, so I urge you to please register early.

We look forward to meeting with you face-to-face to hear your views on how you think we can best implement TEA-21 so that we at the Department of Transportation can continue to strive to keep America's transportation system the best in the world.

Sincerely,

Gordon J. Linton

Nick Hodgens
206-220-7954

Enclosures

U.S. Department of Transportation
TEA-21 Listening Sessions

REGISTRATION FORM

Please complete this form and return via mail or fax by to:

MCA/FTA-21
8484 Georgia Avenue, Suite 320
Silver Spring, MD 20910
301/565-4020 (phone) 301/587-4138 (fax)

Name:_____

Title:_____

Organization:_____

Address:_____

City/State/Zip_____

Phone:_____ Fax:_____

Space is limited, please register in advance!

Please indicate the session that you will be attending:

- ☐ Dallas, Texas, Wednesday, September. 9, 1998
- ☐ Portland, Oregon, Monday, September 14, 1998
- ☐ San Francisco, California, Tuesday, September 15, 1998
- ☐ Atlanta, Georgia, Wednesday, September 16, 1998
- ☐ Kansas City, Missouri, Tuesday, September 22, 1998
- ☐ Chicago, Illinois, Wednesday, September 23, 1998
- ☐ Philadelphia, Pennsylvania, Friday, October 2, 1998

New York, New York, Thursday, October 8, 1998 following the APTA Annual Conference. Contact the APTA Meeting Department at 202/898-4074/38.

Federal Transit Administration

U.S. Department of Transportation
TEA-21 Listening Sessions

Meeting Locations

September 9, 1998, Dallas, Texas

Hyatt Regency DFW (inside Dallas/Fort Worth Airport, connected to Terminal 3E)
International Parkway, DFW Airport, Texas 75261-9014
Telephone: (972) 453-1234

September 14, 1998, Portland, Oregon

Ramada Plaza Hotel
1441 NE Second Avenue
Portland, OR 97232
Telephone: (503) 233-2401

September 15, 1998, San Francisco, California

Holiday Inn Financial District
750 Kearny Street
San Francisco, CA 94108
Telephone: (415) 433-6600

September 16, 1998, Atlanta, Georgia

Sheraton Colony Square Hotel
188 14th Street, NE
Atlanta, GA 30361
Telephone: (404) 892-6000

September 22, 1998, Kansas City, Missouri

Doubletree Hotel
1301 Wyandott Street
Kansas City, MO 64105
Telephone: (816) 460-6618

September 23, 1998, Chicago, Illinois

Ambassador West Hotel
1300 N. State Parkway
Chicago, IL 60610
Telephone: (312) 787-3700

October 2, 1998, Philadelphia, Pennsylvania

Doubletree Hotel
Broad Street at Locust
Philadelphia, PA 19107
Telephone: (215) 893-1600

JPACT Freight Tour
Thursday, September 24, 1998
7:30 am to 1:00 pm

Tour Objective:

To better understand goods movement in our region and the role of freight in the regional economy. The tour will focus on food products as an industry surrogate for goods movement in high tech, manufacturing, wood products and other industrial sectors.

Itinerary:

- Leave Metro Regional Center at 7:30 AM
- Follow the goods movement cycle for a typical food product
  - Review the food processing stage with a tour at Reser's in Washington County
  - Review the warehousing/distribution stage with a tour of Albertson's warehouse at 181st/I-84
  - Review the retail grocery stage through the store's loading docks
- Complete the tour at Terminal 6 with a presentation by Port of Portland's Executive Director, Mike Thorne
- Return to Metro by 1:00 PM

Other Speakers/Information:

In addition to the speakers from the food products industry, speakers from other industry sectors will explain the process from raw product to final consumption, how it differs and how it is similar to food products process.

Media:

Metro will send a press release of the event and encourage media coverage.

Coffee and Lunch will be provided.

For more information, contact Chris Deffebach at Metro, 797-1921. A detailed itinerary will be sent to JPACT members prior to the tour.

COMMITTEE MEETING TITLE JPACT

DATE 9-10-98

NAME	AFFILIATION
GREG GREEN	OREGON DEQ
Bob Stacey	Tri-Met
Andy Cohen	Metro
Ed Washington	METRO
KARL ROHDE	C3
Sharron Kelley	Multnomah County
ROB DRAKE	CITIES OF WASHINGTON CO.
SUSAN L. McLEAN	METRO COUNCIL
DAVE WILLIAMS	ODOT
Lou Ogden	WASHCO CITIES (ACT)
Don Wagner	WS DOT
Linda Peters	Washington County
Mike Hoglund	Metro
BRIAN FINNERAN	DEQ
John Rosenberger	Washington Co. LUT
Ron Sander	CLACKAMAS COUNTY
STEVE DOTTERRER	CITY OF PORTLAND STAFF
GB ARRINGTON	TRI-MET
Gary Katsion	Kittelson & Associates, Inc.
RICH LEDBETTER	METRO
Susan Lee	Multnomah County
Rod Park	Metro Council-Elect
GORDON OLIVER	OREGONIAN

COMMITTEE MEETING TITLE JPACT

DATE 9-10-98

NAME	AFFILIATION
Chris Deffebach	Metro