

Proposed Amendment to Resolution No. 94-1989

BE IT RESOLVED, That the following general approach be adopted for the continuation of the South/North Transit Corridor Study:

Item 3.a

Between the Portland and Milwaukie central business districts, the Ross Island Bridge Crossing, generally between the Ross Island Bridge in the north and Bancroft and Holgate streets in the south, and the McLoughlin Boulevard alignment shall be developed for further study within the Draft Environmental Impact Statement. The Caruthers area crossing will be evaluated further in order for the Metro Council and the C-TRAN Board of Directors to determine whether it should also be included in the *South/North Detailed Definition of Alternatives Report* and developed further in the Draft Environmental Impact Statement. Both the Ross Island and Caruthers alternatives will be provided equal consideration through this further evaluation.

Proposed Amendment to the draft *South/North Tier I Final Report*

2.4 Portland CBD to Milwaukie/South Willamette River Crossing Alignment Alternative

1. The *Ross Island Bridge Crossing Alternative* and *McLoughlin Boulevard Alignment Alternative* are the LRT alignment alternatives in the segment from the Portland CBD to Milwaukie/South Willamette River Crossing that will be studied further within the Tier II of the DEIS.
2. The Caruthers area crossing will be evaluated further in order to allow the C-TRAN Board of Directors and Metro Council to determine whether it should also be included in the *Detailed Definition of Alternatives Report* and developed further in the DEIS. Accordingly, staff shall:
 - [a] Determine the costs, travel demand and local and regional land use and development benefits of linking the Caruthers Crossing with the Brooklyn Yards alignment.
 - [b] Refine the ridership potential of the OMSI Station to fully reflect current plans and policies regarding the Portland General Electric "Station L" redevelopment site, the Central Eastside Industrial Area and OMSI. Determine whether local redevelopment opportunities are feasible and provide assurances necessary to meet local and regional land use and development objectives.
 - [c] Evaluate Caruthers Bridge designs to see if they could provide adequate access to both the North Macadam Redevelopment Area and the OMSI area.

- [d] Evaluate alternate bridge designs, alignment options and station locations for a Caruthers area crossing and recommend a refined bridge, alignment and station location design for inclusion within the *Detailed Definition of Alternatives Report* if a Caruthers area crossing is selected for advancement into the DEIS.
3. The location of the Ross Island area river crossing, bridgeheads and stations in this segment will receive further analysis to determine how to serve as much of the North Macadam redevelopment area and S.E. residential areas as possible. Further, if a Caruthers area crossing is selected to advance into the DEIS then its design will be refined and included within the *Detailed Definition of Alternatives Report*. Accordingly, staff shall:
- [a] Establish special study areas on the east and west banks of the Willamette River which are generally bounded by the Ross Island Bridge and S.W. Gibbs Street in the north and Bancroft Street and Holgate Boulevard in the south.
 - [b] Evaluate alternate bridge locations, alignment options and station location(s) within these study areas which provide for optimal light rail coverage to S.E. Portland neighborhoods and the North Macadam Area.
 - [c] Recommend a refined location for the Ross Island area LRT bridge, associated alignment and stations in the *Detailed Definition of Alternatives Report* based on an assessment of development opportunities, costs, environmental considerations and engineering constraints.
 - [d] Refine the ridership potential of westbank stations to fully reflect current plans and policies for the North Macadam Redevelopment Area. Determine whether local redevelopment opportunities are feasible and provide assurances necessary to meet local and regional land use and development objectives.
4. Both the Ross Island and Caruthers Alternatives will be provided equal consideration through this further evaluation. Accordingly, staff shall:
- [a] Provide a local selection process identical to the process that led to the adoption of this report to consider this further analysis and to determine whether to advance the Caruthers Crossing Alternative into the Tier II DEIS.
 - [b] Work with interested parties to develop and evaluate the design options described above.
 - [c] Continue to undertake planning and engineering work for the LRT alignment alternatives that allows for an Eastside transit connection.

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 95-1995 FOR THE PURPOSE OF CERTIFYING THAT TRI-MET'S JOINT COMPLEMENTARY PARATRANSIT PLAN UPDATE FOR 1995 CONFORMS TO METRO'S REGIONAL TRANSPORTATION PLAN

Date: November 30, 1994

Presented by: Andrew Cotugno

PROPOSED ACTION

This resolution certifies to the Federal Transit Administration (FTA) that Tri-Met's Joint Complementary Paratransit Plan Update for 1995 conforms to Metro's Regional Transportation Plan (RTP). Tri-Met is required to obtain this certification from Metro to meet the requirements of the Americans With Disabilities Act of 1990.

TPAC has reviewed this update and recommended approval pending formal action and approval by the Committee on Accessible Transportation (CAT) and the Tri-Met Board of Directors. Subsequent action by CAT and the Tri-Met Board was taken on December 21, 1994 in support of the resolution.

TPAC also requested that Tri-Met staff be available at a future meeting to discuss the following:

1. Paratransit definitions and policy issues associated with achievement of selected milestones; and
2. What policies and procedures should be included in the upcoming RTP Update.

FACTUAL BACKGROUND AND ANALYSIS

The Americans With Disabilities Act (ADA), enacted by the U.S. Congress in 1990, mandates the development of a plan to address discrimination and equal opportunity for disabled persons in employment, transportation, public accommodation, public services, and telecommunications. The original ADA transportation plan, as developed by Tri-Met and adopted by the Tri-Met Board of Directors on December 18, 1991, outlined the requirements of the Act as applied to Tri-Met's service area, the deficiencies of the existing service when compared to the requirements of the new Act, and the remedial measures necessary to bring Tri-Met and the region into compliance with the Act.

The final rule also requires that Metro, as the Metropolitan Planning Organization, review Tri-Met's paratransit plan annually and certify that the plan conforms to the Regional Transportation Plan (RTP). This certification is one of the required components of Tri-Met's submittal to the Federal Transit Administration and, without the certification, Tri-Met cannot be found to be in compliance with the ADA.

Annual Plan Update Requirements

It is required under 49 CFR part 37.139(h) that the Paratransit Plan be updated and certified each year. The annual plan update must include all significant changes and revisions to the established timetable for implementation and address how and when key milestones within the plan are being met (49 CFR part 37.139(j)). It is also required that milestone slippage greater than one year be addressed.

The 1994 Paratransit Plan Update previously submitted by Tri-Met and certified by Metro in Resolution No. 94-1884, included several milestones that were to be achieved by January 1995. The status of these milestones are addressed in Tri-Met's 1995 Annual Paratransit Plan Update.

Tri-Met's 1995 Annual Plan Update

Tri-Met's 1995 Annual Paratransit Plan Update identifies current activities and planned strategies for complying with the milestones previously committed to in their 1994 Plan update by September 1995. The schedule for completing all necessary activities and assigned responsibilities is included as Attachment A. It is required that the 1995 Paratransit Plan Update be approved and submitted to FTA by 1/26/95.

A. Progress On Milestones To Be Achieved Prior to 1/25/95

Tri-Met achieved full compliance with ADA for the following milestones identified in the 1994 Plan Update (Table 1 in the 1995 Paratransit Plan Update).

1. No substantial number of trip denials or missed trips. A substantial number is defined by Tri-Met to be less than one-tenth of 1 percent. Referring to Table 4, Page 12 of the 1995 Paratransit Plan Update (Exhibit A to Resolution No. 95-1995), 743 trips were denied due to capacity limitations. This represents less than one-tenth of 1 percent of the total ADA paratransit trips provided by Tri-Met in 1994.
2. The Complementary Paratransit Plan was updated (January 1995) consistent with the requirements of 49 CFR Section 37.139.

B. Revised ADA Paratransit Plan Timetable for 1995

The compliance dates for the following milestones (Table 1 and Table 2 in Exhibit A) were revised by Tri-Met during 1994. Compliance with these items was contingent on the operation of a new paratransit scheduling program at Tri-Met. Tri-Met has purchased and installed the new program but it is

not yet operational. It is expected that the system will be fully operational in early 1995.

1. Requests will be accepted during normal business hours on a "next day" basis. Originally scheduled to be completed by 9/94. New target date is 4/95.
2. Trips will be scheduled within one hour of requested pickup time. Original completion date 9/94. New target date is 4/95.
3. There will be no substantial numbers of significantly untimely pickups for initial or return trips. Original date 9/94. New target date is 6/95.
4. There will be no substantial number of trips with excessive trip lengths. Original date 9/94. New target date is 6/95.

It should be noted that Tri-Met is in the process of defining what constitutes a "substantial number" for items 3 and 4 above. Their finding that these milestones have not been achieved to date is based on complaints and inquiries from ADA paratransit riders.

C. Plan Review by Citizens for Accessible Transportation (CAT) Committee

A public hearing was held by the Committee on Accessible Transportation (CAC) on November 16, 1994 to review the proposed update. Testifiers expressed some concern with the quality measures for service provision. In addition, some recommended that the provision of ADA service be extended beyond the three-quarter mile boundary currently used. Tri-Met is opposed to extending all ADA services beyond the boundary but will consider what level of service could be provided outside the boundary.

Tri-Met is confident that the revised dates for items 1-4 above can be met. The CAT committee met on December 21, 1994 and recommended approval of the plan with the following change: Strike out the sentence "Following this evaluation and discussion with the CAT, the service may be reduced or eliminated." under item 2 on page 31 of the Paratransit Plan Update. With this change, the CAT approved the 1995 ADA Paratransit Plan Update.

D. Plan Review by Tri-Met Board of Directors

The Tri-Met Board reviewed the plan at its December 21, 1994 meeting. They were in agreement with CAT's recommendation and subsequently approved the 1995 ADA Paratransit Plan Update, as well.

With the implementation of items 1-4, Tri-Met's proposed Para-transit Plan Update will conform to the existing RTP. It should be pointed out that the RTP is undergoing a major revision to be completed by May 1995. The revised RTP will also be consistent with the ADA service requirements.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 95-1995.

RL:hmk
95-1995.RES
12-22-94

Attachment A

TIMETABLE FOR 1995 PARATRANSIT PLAN UPDATE

ACTIVITY	RESPONSIBILITY	DATE
Information Collected	Operations, Fiscal	10/94
Review of Plan Update	ADA Task Force	10/11/94
Review of Plan Update and approval to distribute	Bob Post/Executive Directors	10/94
LIFT/Paratransit Subcommittee	Park Woodworth	10/12/94
Distribution of Plan and notice of Hearing published	Park Woodworth /Legal	10/19/94
Plan Update reviewed at CAT	Park Woodworth	10/19/94
LIFT/Paratransit Subcommittee	Park Woodworth	11/9/94
Public Hearing on Plan Update at CAT	Park Woodworth	11/16/94
Modification of Plan based on public input	Park Woodworth	11/94
Review of any modifications	Bob Post	12/94
Board Resolution to Nancy Klass	Park Woodworth	12/9/94
LIFT/Paratransit Subcommittee	Park Woodworth	12/14/94
Recommendation to Support Plan	CAT	12/21/94
Approval of Plan	Tri-Met Board	12/21/94
Review and Approval	TPAC	12/21/94
Review and Approval	JPACT	1/12/95
Review and Approval	Metro Council	1/26/95
Send to FTA		1/26/95

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF CERTIFYING THAT) RESOLUTION NO. 95-1995
TRI-MET'S JOINT COMPLEMENTARY)
PARATRANSIT PLAN UPDATE FOR 1995) Introduced by
CONFORMS TO METRO'S REGIONAL) Rod Monroe, Chair
TRANSPORTATION PLAN) JPACT

WHEREAS, The U.S. Department of Transportation issued a final rule implementing the transportation provisions of the Americans with Disabilities Act (ADA) on September 6, 1991; and

WHEREAS, The final rule as applied to the Portland metropolitan area requires Tri-Met to develop an annual Paratransit Plan Update which conforms to the Regional Transportation Plan (RTP); and

WHEREAS, The final rule requires that the Metropolitan Planning Organization (MPO) review the Paratransit Plan Update and certify that it conforms to the RTP; and

WHEREAS, The Joint Policy Advisory Committee on Transportation certifies that it has reviewed the ADA Paratransit Plan Update for 1995 prepared by Tri-Met as required under 49 CFR part 37.139(h) and finds it to be in conformance with the RTP (the transportation plan developed under 49 CFR part 613 and 23 CFR part 450); and

WHEREAS, The Joint Policy Advisory Committee on Transportation recommends certification by the Metro Council; and

WHEREAS, The Committee on Accessible Transportation has reviewed and approved this Paratransit Plan update; now, therefore,

BE IT RESOLVED,

That the Metro Council hereby certifies that it has reviewed the ADA paratransit plan prepared by Tri-Met (included as Exhibit A) as required under 49 CFR part 37.139(h) and finds it to be in conformance with the RTP, the transportation plan developed under 49 CFR part 613 and 23 CFR part 450 (the UMTA/FHWA joint planning regulation), for a period of one year.

ADOPTED by the Metro Council this _____ day of _____,
1995.

Ruth McFarland, Presiding Officer

RBL:lmk
95-1995.RES
12-22-94

RECEIVED

1995 ADA (Americans with Disabilities Act)
Paratransit Plan Update
of the
Tri-County Metropolitan Transportation District of Oregon
(Tri-Met)

Final
DRAFT
12-7-94

January 26, 1995

PARATRANSIT PLAN UPDATE FOR 1995

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1995 PARATRANSIT PLAN UPDATE

SECTION I

IDENTIFICATION OF SUBMITTING ENTITIES

AND

MPO CERTIFICATION

IDENTIFICATION OF SUBMITTING ENTITIES

Tri-Met
4012 SE 17th Ave.
Portland, Oregon 97202
(503) 238-4915

Authorized Person: Tom Walsh, General Manager
(503) 238-4915

Contact Person: Park Woodworth, Director
Accessible Program Development
(503) 238-4879, TTY (503) 238-5811

Metropolitan Service District (Metro)
600 NE Grand Ave.
Portland, OR 97232-1797
(503) 797-1700

Authorized Person: _____, Presiding Officer
(503) 797-1700

Contact Person: Rich Ledbetter, Senior Transportation Planner
(503) 797-1761

FORM 1

MPO CERTIFICATION OF PARATRANSIT PLAN

The Metro
hereby certifies that it has reviewed the ADA paratransit plan update
prepared by
as required under 49 CFR 37.139(j) and finds it to be in conformance with the
transportation plan developed under 49 CFR part 613 and 23 CFR part 450
(the FTA/FHWA joint planning regulation). This certification is valid for one
year.

signature

name of authorized official

title

date

1995 PARATRANSIT PLAN UPDATE

SECTION II

TIMETABLES, PROGRESS REPORT ON MILESTONES

AND

SIX SERVICE CRITERIA

SYSTEM NAME: Tri-Met.

CITY: Portland

STATE: Oregon

1994-1996 ADA PARATRANSIT PLAN TIMETABLE AND PROGRESS REPORT * (Table 1)

1994 UPDATE MILE- TARGET STONE DATE MET ? (MM/YY) (Y/N)	1994 1995 NEW DATE ? (MM/YY)
1994 MILESTONE PROGRESS REPORT -- as of Jan. 1995 (Y/N -- period January 26, 1994 - January 25, 1995)	

09/94	Full Compliance with ADA including
N	a. Request accepted during normal business hour on "next day" basis 4/95
N	b. Trips scheduled within one hour of requested pickup time 4/95
N	c. No substantial numbers of significantly untimely pickups for initial or return trips 6/95
Y	d. No substantial number of trip denials or missed trips NA
N	e. No substantial number of trips with excessive trip lengths 6/95

Note: Using Form 2, provide detailed written explanation on milestone slippage greater than one full year (12 months).

* List all 1994-1996 ADA Paratransit Milestones; Then Indicate Progress (Y/N) On Milestones Targeted To Be Achieved Prior To 1/26/95; Include Additional Accomplishments.

FORM 2

SYSTEM NAME: Tri-Met

JAN. 95

EXCEPTION REPORT: MILESTONE SLIPPAGE EXPLANATION*

<u>MILESTONE or FULL COMPLIANCE DELAYS:</u>	<u>Target Date '94 Update</u>	<u>New Target Date '95 Update</u>
1. Requests accepted on next day basis	9/94	4/95
2. Trips scheduled within one hour of requested pickup time	9/94	4/95
3. No substantial number of significantly untimely pickups	9/94	6/95
4. No substantial number of trips with excessive trip lengths	9/94	6/95

Explanation for 1 through 4

In the Tri-Met planning process, compliance with the four items above is contingent on the operation of a new paratransit scheduling program. Tri-Met has purchased and installed a new program but it is not yet operational. The schedule now is for the program to become operational in 1994. When the inevitable first months' bugs are worked out, the paratransit program will start accepting next day rides, and schedule and monitor to ensure timely pickups and reasonable length trips.

***Note:** A narrative explanation, using Form 2, must accompany Table 1, when there is significant milestone slippage. During the 1994-1996 period, "significant milestone slippage" exists (1) when the target date for Plan full compliance is delayed or (2) when individual milestones slip by a year (a full 12 months). This Form 2 provides a brief example of such a slippage explanation. If there are no milestone or full compliance delays, no explanation is required, and Form 2 can be omitted. [Attach as many additional sheets to this form as needed; you may put this form on your own wordprocessor.]

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: OR

REVISED 1995 - 1996 ADA PARATRANSIT PLAN TIMETABLE (Table 2)

1995 - 1996

TARGET DATE

(MM/YY)

ANY REMAINING MILESTONES - JANUARY 1995 UPDATE

4/95	Requests accepted during normal business hours on "next day" basis
4/95	Trips scheduled within one hour of requested pickup time
6/95	No substantial number of significantly untimely pickups
6/95	No substantial number of trips with excessive trip length

ELIGIBILITY, SIX SERVICE CRITERIA, AND FULL COMPLIANCE DATE (Table 3, Page 1)

COMPLIANCE ITEM	IN FULL COMPLIANCE NOW (Y/N)	IF NO, EXPECTED DATE OF FULL COMPLIANCE (MM/YY)
ELIGIBILITY PROCESS		
1. Requests for certification being accepted and all aspects of policy (appeals, documentation, etc.) established	Y	
2. Compliance with companion and personal care attendant requirements	Y	
3. Compliance with visitor requirements	Y	
SIX SERVICE CRITERIA		
SERVICE AREA		
4. Service to all origins and destinations within the defined area	Y	
5. Coordination with contiguous/overlapping service areas, if applicable	Y	
RESPONSE TIME		
6. Requests accepted during normal business hours on "next day" basis	N	4/95
7. Requests accepted on all days prior to days of service (e.g., weekends/holidays)	Y	
8. Requests accepted at least 14 days in advance	Y	
9. Trips scheduled within one hour of requested pickup time	N	4/95
FARES		
10. No more than twice the base fixed route fare for eligible individuals	Y	
11. Compliance with companion fare requirement	Y	

SYSTEM NAME: Tri-Met

CITY: Portland STATE: Oregon

(Table 3, Page 2)

COMPLIANCE ITEM	IN FULL COMPLIANCE NOW (Y/N)	IF NO, EXPECTED DATE OF FULL COMPLIANCE (MM/YY)
12. Compliance with personal care attendant fare requirement	Y	
DAYS AND HOURS OF SERVICE		
13. Paratransit provided during all days and hours when fixed route service is in operation	Y	
TRIP PURPOSES		
14. No restriction on types of trip purposes	Y	
15. No prioritization by trip purpose in scheduling	Y	
CAPACITY CONSTRAINTS		
16. No restrictions on the number of trips an individual will be provided	Y	
17. No waiting lists for access to the service	Y	
18. No substantial numbers of significantly untimely pickups for initial or return trips	N	6/95
19. No substantial numbers of trip denials or missed trips	Y	
20. No substantial numbers of trips with excessive trip lengths	N	6/95
21. When capacity is unavailable, subscription trips are less than 50 percent	Y	
DATE TARGETED FOR "FULL COMPLIANCE" WITH ALL "ADA PARATRANSIT" REQUIREMENTS		
In 1994 Update Submission		
		9/94
In 1995 Update Submission		
		6/95

1995 PARATRANSIT PLAN UPDATE

SECTION III

DEMAND AND SERVICE ESTIMATES

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

ADA PARATRANSIT DEMAND AND SERVICE ESTIMATES (Table 4, Page 1)

	Actual 1992	Actual 1993	Actual 1994	Est. 1995	Proj. 1996	Proj. 1997
DEMAND (No. Trips/Year) (Thousands of One-Way Trips)						
1. ADA Paratransit Trips Provided/Year (000)	375	484	575	594	609	633
2. Total Paratransit Trips Provided/Year (000) (Total ADA and non-ADA)	558	647	747	806	829	849
3. Total Paratransit Revenue Hours/Year (000) (Total ADA and non-ADA) [Sec. 15 definition]	216	274	299	329	345	363

In 1991, total paratransit trips (line 2) were: 513

ADA PARATRANSIT SERVICE: Purchased Transportation.

- 4. For 1994, estimate the number of trips on line 1 that were provided by contracted taxi service: 22,500
- 5. For 1994, estimate the number of trips on line 1 that our system purchased (contracted out) rather than provide in-house: 626,000
(include contracted taxi service from line 4 and other service owned or operated by the contractors)

ADA PARATRANSIT SERVICE (Table 4, Page 2)

Actual	Proj.
1994	1997
-----	-----

6. SSA Clients. In 1994, estimate the number of trips on line 1, that you provided to clients of local social service agencies (SSA), who prior to the ADA, provided SSA paratransit service for their clients. Provide an estimate for 1997. (Optional)

--	--

7. Trip Denials. In 1994, estimate the number of requested ADA paratransit trips that were "denied" because of capacity limitations. (Please do not include trips missed because of traffic or vehicle breakdowns, trips negotiated outside the 1 hour window, "no-shows," etc.) How many by 1997? (Required)

743	716
-----	-----

8. Destinations. Clearly, it is discrimination under the ADA to prioritize trip requests based on trip purpose. However, for 1994, please estimate the percent of trips on line 1 that were for the following purposes: (Optional)

Work Trips	42	%	Food/Shopping	21	%
Dialysis	9	%	Medical Trips (Other Than Dialysis)	14	%
Educational	2	%	Other Trips	12	%

Note: Percentages above should total 100%.

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1995 PARATRANSIT PLAN UPDATE

SECTION IV

BUDGET, COST AND VEHICLE ESTIMATES

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

ADA PARATRANSIT CAPITAL & OPERATING BUDGET SUMMARY (Table 5)
 (projections in thousands of 1994 dollars)

	Actual 1992	Actual 1993	Actual 1994	Est. 1995	Proj. 1996	Proj. 1997	6 Year Total 92-97
ADA PARATRANSIT EXPENSES *							
1. Capital Expenses	<u>1482</u>	<u>1265</u>	<u>1458</u>	<u>2941</u>	<u>1765</u>	<u>685</u>	<u>9596</u>
2. Operating Expenses	<u>4522</u>	<u>5182</u>	<u>7190</u>	<u>8345</u>	<u>8469</u>	<u>8579</u>	<u>42,287</u>
3. Subtotal ADA Paratransit Expenses (sum of lines 1 + 2)	<u>6004</u>	<u>6447</u>	<u>8648</u>	<u>11,286</u>	<u>10,234</u>	<u>9264</u>	<u>51,883</u>
TOTAL PARATRANSIT EXPENSES (ADA & Non-ADA combined)							
4. Capital Expenses	<u>1625</u>	<u>1760</u>	<u>1712</u>	<u>3680</u>	<u>2055</u>	<u>855</u>	<u>11,687</u>
5. Operating Expenses	<u>5958</u>	<u>6937</u>	<u>9697</u>	<u>12079</u>	<u>12293</u>	<u>12451</u>	<u>59,415</u>
6. TOTAL PARATRANSIT EXPENSES (sum of lines 4 and 5)	<u>7583</u>	<u>8697</u>	<u>11409</u>	<u>15759</u>	<u>14348</u>	<u>13306</u>	<u>71,102</u>

IN 1991, TOTAL PARATRANSIT COSTS (Line 6) FOR OUR TRANSIT SYSTEM WERE \$ 5,972

* Using a ratio to break out ADA from total paratransit expenses is acceptable. Do not include any ADA fixed-route costs.

** If non-ADA paratransit service is provided, add ADA to non-ADA costs to obtain Total Paratransit Expenses.

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

TOTAL TRANSIT SYSTEM COST ESTIMATES (Table 6)
 (projections in thousands of 1994 dollars)

	Actual	Actual	Actual	Est.	Proj.	Proj.	6 Year
TOTAL TRANSIT SYSTEM COSTS *	1992	1993	1994	1995	1996	1997	Total
							92-97
1. Capital Expenses	<u>18,414</u>	<u>23,499</u>	<u>29,460</u>	<u>48,613</u>	<u>56,549</u>	<u>25,032</u>	<u>201,567</u>
2. Operating Expenses	<u>105,087</u>	<u>115,501</u>	<u>125,558</u>	<u>141,189</u>	<u>142,091</u>	<u>145,688</u>	<u>775,114</u>
3. TOTAL SYSTEM COSTS (lines 1 + 2)	<u><u>123,501</u></u>	<u><u>139,000</u></u>	<u><u>155,018</u></u>	<u><u>189,802</u></u>	<u><u>198,640</u></u>	<u><u>170,720</u></u>	<u><u>976,681</u></u>
4. ADA PARATRANSIT EXPENSES (line 3, Table 5)	<u>6,004</u>	<u>6,447</u>	<u>8,648</u>	<u>11,286</u>	<u>10,234</u>	<u>9,264</u>	<u>51,883</u>
5. ADA PARATRANSIT AS PERCENT OF TOTAL COSTS (line 4 divided by line 3)	<u>4.9%</u>	<u>4.6%</u>	<u>5.6%</u>	<u>5.9%</u>	<u>5.2%</u>	<u>5.4%</u>	<u>5.3%</u>

IN 1991, TOTAL SYSTEM COSTS (line 3) FOR OUR TRANSIT SYSTEM WERE \$ 122,168

* Total transit system costs encompass all system costs, not just ADA-related costs. These transit system costs must include:
 (1) all fixed-route costs (bus, rail, etc.), plus (2) all paratransit expenses (ADA and non-ADA).

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

ADA ACCESSIBILITY: FIXED-ROUTE BUSES (Table 7)

	Actual 1990	Actual 1991	Actual 1992	Actual 1993	Actual 1994	Est. 1995	Proj. 1996	Proj. 1997
BUSES IN ACTIVE FLEET								
1. Total Number of Buses	<u>523</u>	<u>526</u>	<u>579</u>	<u>580</u>	<u>592</u>	<u>592</u>	<u>621</u>	<u>608</u>
2. Buses Without Lifts/Ramps	<u>204</u>	<u>166</u>	<u>140</u>	<u>96</u>	<u>108</u>	<u>108</u>	<u>51</u>	<u>7</u>
3. Buses With Pre-ADA Lifts/Ramps	<u>319</u>	<u>319</u>	<u>321</u>	<u>321</u>	<u>321</u>	<u>321</u>	<u>321</u>	<u>246</u>
4. Buses With ADA Lifts/Ramps (meets Part 38 lift specifications)	<u>0</u>	<u>41</u>	<u>118</u>	<u>163</u>	<u>163</u>	<u>163</u>	<u>249</u>	<u>355</u>
(Note: The sum of lines 2, 3, and 4 should equal line 1.)								
5. Percent With Lifts/Ramps (sum of lines 3 and 4, divided by line 1)	<u>61 %</u>	<u>68 %</u>	<u>76 %</u>	<u>84 %</u>	<u>82 %</u>	<u>82 %</u>	<u>92 %</u>	<u>99 %</u>

For 1994, provide an approximate estimate of the number of boardings where lifts/ramps were deployed on the fixed-route system: 93,532

For an average day, can you estimate the total number of persons with any disabilities that use your fixed-route service? (Do not include customers who normally use ADA paratransit service.) (Optional): _____

16

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

TOTAL "PARATRANSIT" VEHICLES USED BY YOUR SYSTEM * (Table 8)

	Actual 1991	Actual 1992	Actual 1993	Actual 1994	Est. 1995	Proj. 1996	Proj. 1997
TOTAL NUMBER IN ACTIVE FLEET							
1. All Paratransit - Vans and Minivans *	<u>10</u>	<u>10</u>	<u>10</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>12</u>
2. All Paratransit - Buses *	<u>104</u>	<u>118</u>	<u>140</u>	<u>154</u>	<u>173</u>	<u>192</u>	<u>203</u>
3. Paratransit - Sedans/Wagons * (other than taxis)	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>
LIFT-EQUIPPED PARATRANSIT VEHICLES							
4. Paratransit - Buses, Vans and Minivans * (with lifts/ramps from lines 1 and 2)	<u>111</u>	<u>125</u>	<u>147</u>	<u>161</u>	<u>186</u>	<u>206</u>	<u>217</u>

CONTRACTOR VEHICLES

5. For 1994, from lines 1 and 2, estimate the number of buses, vans, and minivans, etc., "OWNED" by your contractors that routinely provide paratransit (ADA and non-ADA) for your system. 36

Please estimate 1997 41

* Please include all dedicated paratransit vehicles (ADA or non-ADA service combined) used on your system. Include all paratransit vehicles your system owns or leases, as well as vehicles used from your contractors' fleet. Do not include any accessible vehicles used on the fixed-route.

SYSTEM NAME: Tri-Met

CITY: Portland

STATE: Oregon

YOUR ADA "PARATRANSIT" CUSTOMERS (Table 9)
(Please Make An Estimate Based On Actual Eligibility Determinations)

1. By 1994, how many persons had been certified as ADA paratransit eligible by your system? 12,000

By 1997, please project how many people will be certified? 17,000

2. Using the 1990 Census, what is the total population of your service area? _____

3. Of those certified, can you estimate the percent who are ages... (Optional)

0 to 16 years old _____% 17 to 61 _____% 62 to 70 _____% Over 70 _____%

4. Of those eligible for ADA paratransit, how many are employed? (Optional) _____

5. Of those ADA paratransit eligible, what percent have as their most limiting or qualifying impairment... (Optional, should total 100%)

Sensory Impairments (Visual, Hearing) _____ %

Mobility Impairments Requiring Adaptive Devices (Devices: Wheelchairs, Walkers, etc.) _____ %

Mental, Cognitive or Developmental Impairments (including Alzheimers) _____ %

Health Impairments (Heart Disease, MS, CP, Arthritis, Kidney Dysfunction, etc.) _____ %

1995 PARATRANSIT PLAN UPDATE

SECTION V

PUBLIC PARTICIPATION

The public participation for the Paratransit Plan Update was focused on Tri-Met's Committee on Accessible Transportation (CAT) and its subcommittees. The CAT LIFT/Paratransit Subcommittee was given an update of the plan development process at its regular meeting on October 12 and this was reported at the regular CAT meeting on October 19, 1994. CAT members and subcommittee members were sent the November 1, 1994 draft Paratransit Plan Update (printed or 4 track tape) in the first week of November.

A Public Notice regarding the plan and Tri-Met public hearings was published in four newspapers between October 26 and November 2, 1994 and was also included in a newsletter distributed to over 12,000 LIFT General Passengers, agencies, and friends. Oregon Public Broadcasting's Golden Hours was provided with the Public Notice and indicated that they would air the information. Rider alerts were placed on LIFT vehicles.

Discussions regarding the Plan Update took place at the LIFT Paratransit Subcommittee on November 9th, 1994. Tri-Met responded to nineteen separate requests for copies of the 1994 draft plan including two requests for large print and one request for 4-track tape. Seven written documents were submitted and oral testimony by phone outside the public hearings was submitted by seven people. Tri-Met held a public hearing at the regular CAT meeting on November 16, 1994 and another in the evening on the same date. Testimony at the hearings was received from fourteen people. Following is a description of the comments made and responses to those comments.

PUBLIC HEARING ORAL OR SIGNED TESTIMONY

NOVEMBER 16, 1994 (DAY) - 9 public, 17 staff and CAT members, and a sign language interpreter and court reporter, 9 people testified.

PUBLIC TESTIMONY 1 - The customer had received paratransit service in New Orleans and Washington D.C. Tri-Met is way ahead of Washington and way behind New Orleans.

TRI-MET RESPONSE - No comment.

PUBLIC TESTIMONY 2 - LIFT scheduling should be monitored closely because it is not doing an adequate job.

TRI-MET RESPONSE - We believe that both service and monitoring capability will be improved with the new scheduling software that is becoming operational soon.

PUBLIC TESTIMONY 3 - Georgianne Obinger read the testimony of Donna Crawford which was submitted in written form.

TRI-MET RESPONSE - The response is covered under written testimony.

PUBLIC TESTIMONY 4 - The next person presented written testimony that is discussed later, asked about the budget and computer software, and suggested that the 3/4 mile does not serve all of those needing service.

TRI-MET RESPONSE - A breakdown of the budget information was provided to the CAT committee at this meeting. The new computer program will provide more reports to assess the quality of service. Tri-Met does not want to expand the ADA boundary for guaranteed rides until after it has met the legal requirements within the 3/4 mile boundary and requests for service have stabilized. We are, however, reevaluating what the level of service should be outside the 3/4 mile and will bring recommendations back to the Committee on Accessible Transportation.

PUBLIC TESTIMONY 5 - The individual has great concern about the 3/4 mile line and customers losing service after using the LIFT for a long time. She was happy to hear that the Deputy General Manager believes that the LIFT has to become a true part of the family of services we provide. Tri-Met increased the length of rides in order to make the no turn down goal.

TRI-MET RESPONSE - The 3/4 mile boundary was addressed previously. Service quality must be measured as well as turndowns.

PUBLIC TESTIMONY 6 - The commenter expressed concern about Tri-Met disqualifying current clients and suggested that CAT ask Tri-Met to cease disqualifying current clients.

TRI-MET RESPONSE - After some discussion it was determined that the issue was over customers outside the 3/4 mile boundary. This was discussed previously.

PUBLIC TESTIMONY 7 - This commenter agreed with expanding the 3/4 mile boundary because there is not much bus service outside the city limits and no sidewalks for people using chairs. There should be some provision for people who are eligible for ADA service but have not registered.

TRI-MET RESPONSE - The 3/4 mile boundary was discussed previously. There is a way people can get registered immediately if there are mitigating circumstances. Also, an eligible person can take a friend.

PUBLIC TESTIMONY 8 - (Signed by the sign language interpreter) The customer complimented Tri-Met on having a TTY machine but was concerned by the lack of response at times from the Senior and Disabled Citizen Information Department.

TRI-MET RESPONSE - Three people in the department are trained to use the TTY but the office is only open from 7:30 am to 5:30 pm on weekdays. We will look at the possibility of expanding hours as part of next fiscal year's budget.

PUBLIC TESTIMONY 9 - The customer related problems with Broadway Cab doing LIFT rides and particularly drivers attitude. There was a recommendation for further sensitivity training and more consumer response to CAT, Tri-Met and the LIFT program.

TRI-MET RESPONSE - Broadway Cab and the City of Portland require some sensitivity training for all operators of accessible cabs. We will work with Broadway to improve the sensitivity of their drivers.

NOVEMBER 16, 1994 (EVENING) - 6 public attended, 7 Tri-Met staff and CAT members, and a sign language interpreter, 5 people testified (one twice).

PUBLIC TESTIMONY 1 - A college student related an incident where a LIFT Program ride did not arrive on time causing her to miss a class at a loss of \$250 . Many LIFT problems are related to cab rides ordered by the LIFT Program. She does not want to give up school and wants the LIFT to get her there in a timely manner.

TRI-MET RESPONSE - Tri-Met recognizes that there have been timeliness problems that need to be addressed. We are in the process of defining "significantly untimely pickups and dropoffs" and the new scheduling program should both assist in meeting the definition selected and monitor for variances.

PUBLIC TESTIMONY 2 - A woman testified on behalf of her sister who has been turned down for rides. The sister lives outside the 3/4 mile ADA service area but received rides from the LIFT for the last 8 years. LIFT operators say there is a "grandfather" grant that should allow the customer to ride.

TRI-MET RESPONSE - The "grandfather" grant refers to customers of the LIFT that were receiving ongoing (subscription) service as of 1/26/92. This customer received regular, but not subscription, service as of that date. Nevertheless, a majority of this customer's requests have been honored.

PUBLIC TESTIMONY 3 - John Mullin, Director of Clackamas County Social Services testified and provided written testimony. He indicated that the Plan adversely affects Clackamas County because so much of the population is outside the 3/4 mile line. He stressed that the Clackamas County land area is larger than Washington and Multnomah Counties combined. Clackamas County must also work with three transit districts, Wilsonville and Molalla in addition to Tri-Met. He felt it was important that Tri-Met work together with the County to ensure that transportation needs are met in all areas of the County.

TRI-MET RESPONSE - The 3/4 mile boundary was discussed previously. Tri-Met will continue to work with local governments to provide the best transportation services possible within limited budgets.

PUBLIC TESTIMONY 4 - It was suggested that Tri-Met expand the 3/4 mile ADA boundary.

TRI-MET RESPONSE - This was discussed above.

PUBLIC TESTIMONY 5 - A friend of a LIFT customer indicated that the customer, who is sensitive to cigarette smoke and contaminants in the air, cannot depend on the LIFT to provide rides. The customer's father had to fly here from Pasadena to take him to the doctor. There is a problem with the accessible taxi minivans because they cannot load a standard electric wheelchair with the foot rests in place.

TRI-MET RESPONSE - We are working to improve the reliability of the LIFT program so people can depend on it for important appointments. Park Woodworth is the Tri-Met representative on the Portland Taxicab Board of Review and he will follow up on the taxicab problem. We are somewhat surprised because the minivans meet ADA specifications. Additionally, the Portland taxis have accessible full sized vans which could be assigned when the minivans won't work.

PUBLIC TESTIMONY 6 - It was stressed that a large population of former transit riders no longer support Tri-Met and refuse to take LIFT rides because they don't want to order two days in advance only to be turned down or to be driven around for 2 hours before reaching their destination. It is high time for Tri-Met and LIFT to stop the litany of excuses.

TRI-MET RESPONSE - We hear the frustration and hope to resolve some of the problems soon. Next day rides will be available in April of 1995. The turndowns for ADA eligible rides should remain at a low level and we are working on a definition of "excessive trip length".

In addition to the public hearings, Tri-Met solicited oral and written testimony from the release of the draft document on November 1 through November 30, 1994.

ORAL OR TTY TESTIMONY BY PHONE

Seven comments were received by phone.

TESTIMONY 1 - The first commenter indicated that she had been requested to see a Tri-Met doctor as part of the registration process and then the LIFT didn't show up for the ride. She feels that she is being treated very poorly, and degraded and she is very angry.

TRI-MET RESPONSE - We are sorry for the confusion over the ride. Tri-Met asks people to see a Tri-Met doctor when determining eligibility is very difficult.

TESTIMONY 2 - Caller complimented Tri-Met for being so good and so thoughtful and helpful.

TRI-MET RESPONSE - Thank you.

TESTIMONY 3 - The caller believes that the boundary line should be enlarged by either running buses in rural areas or enlarging the line to one or one and one-half miles. Service is particularly needed in the Oregon City / Beavercreek area.

TRI-MET RESPONSE - The 3/4 mile issue was discussed previously.

TESTIMONY 4 - This person wants to know why her service was cut off since she pays her taxes like everyone else. How come the bus goes by her house to pick up other people?

TRI-MET RESPONSE - This customer lives outside the 3/4 mile boundary. Tri-Met still provides service to "grandfathered" customers outside the 3/4 mile and to others on a space available basis.

TESTIMONY 5 - This caller does not like requesting a nutrition ride for 12 noon and having the pickup scheduled for 8:00 or 9:00 am.

TRI-MET RESPONSE - The quality of service should be better after the new program is operating and the quality goals are more precisely defined.

TESTIMONY 6 - This LIFT customer feels that the calltakers do not allow for negotiations; they offer only a "take it or leave it" option; and no other resources are suggested. The LIFT is getting more difficult to use as it is taking two or more hours to get to and from her work site, a trip that would take 10-15 minutes by car. She holds Tri-Met responsible for improving service quality.

TRI-MET RESPONSE - There is some discussion nationally on what "negotiation" means with respect to ride requests. Our new service quality definitions should assist in clarifying this for the LIFT Program. The definition for "unreasonably long trips" should help in resolving the length of trip issue. We will be working on these definitions with the CAT over the next few months.

TESTIMONY 7 - The caller recommends that Tri-Met look at options for service outside the 3/4 mile boundary once Tri-Met has met ADA compliance because there are a lot of people who can really use the service. She suggests that people outside the 3/4 mile line could pay more and/or the rides be prioritized. It would be interesting to know how many people there would be outside the 3/4 mile limit. Perhaps Tri-Met could use volunteer programs. Another idea would be to have a LIFT block home program where LIFT passengers could stay until the LIFT picked them up. Also, the LIFT could limit the number of rides provided each month.

TRI-MET RESPONSE - Thank you for some good ideas. Tri-Met understands there is a need outside the 3/4 mile boundary and intends to review the service to this area. Ideas like priorities and higher fares may make it reasonable to provide some service. These issues will be brought to the CAT over the next few months.

WRITTEN PUBLIC COMMENT

Seven written documents were submitted commenting on the plan. These letters are contained in Attachment F and are summarized and commented on below.

LETTER 1 FROM LAURIE SITTON - The letter noted some errors in the November 7th draft and asked some pertinent questions. When will the scheduling program be fully functional? What are the definitions of "substantial" and "excessive" in the quality measures. The writer wants clarification of services provided outside of the 3/4 mile boundary.

TRI-MET RESPONSE - Thank you for pointing out errors in the draft. The scheduling program will be operational in 1994 but it takes a few months to get the bugs out and to tune the program properly. This is why Tri-Met is postponing full compliance until June of 1995. The scheduling program will be operating efficiently at that time. We will work to

define substantial and excessive over the next few months so we can be monitoring by June. Service levels outside the 3/4 mile boundary will also be clarified over the next few months.

LETTER 2 FROM DONNA CRAWFORD - Donna Crawford, representing the Disability Advocates Coalition of Clackamas County, urged reconsideration of the 3/4 mile limit for ADA service because the County is a large geographical area served by few fixed routes. They also believe that persons should be grandfathered in and not just the original standing order. There should be a more equitable distribution of transportation service between the three counties so it would more closely match the payroll taxes received. Finally, Tri-Met should limit ride time for paratransit customers and we should monitor that immediately and not wait for the more sophisticated software.

TRI-MET RESPONSE - The 3/4 mile limit was discussed previously. The intent of the original Plan (1/26/92) to continue "grandfathered" rides outside the 3/4 mile boundary was to not disrupt subscription trips to work, school and ongoing medical appointments. Other than those "grandfathered" standing order trips of 1/26/92, the service needs of all customers eligible for the LIFT and residing outside the ADA service area should be evaluated equally.

Tri-Met service planning is district wide and does not allocate service based on the region from which payroll taxes are received. Finally, we are constantly monitoring service quality but it will be more accountable when there are specific definitions for our goals and we have software that can assist in recordkeeping.

LETTER 3 FROM JOHN MULLIN - This was summarized under oral testimony. It also contained letters from the Clackamas County Senior Transportation Consortium, the Clackamas County Area Agency on Aging and the Disability Advocates Coalition as attachments.

TRI-MET RESPONSE - See response to oral testimony.

TWO LETTERS (4 and 5) FROM HAROLD BAUGH - The first letter discusses the problems with the accessible minivan taxis. The second letter referred to the "extremely poor level of service" that a particular customer has been subjected to. A particular problem is the long wait times and "seemingly cavalier attitude toward honoring even their very broad time commitments". This is particularly a problem at night and in bad weather. Mr. Baugh suggests that reducing the ready and wait time to 15 minutes on either side of the appointment time would reduce stress and exposure.

TRI-MET RESPONSE - We appreciate the minivan issue being brought to our attention.

The minivans are an experiment for the taxi industry in Portland. It is clear that regular accessible vans are needed for some customers.

Tri-Met recognizes that it is important to improve the quality as well as the quantity of service. We will be working to define and measure quality issues such as on time performance. The LIFT presently uses plus or minus 15 minutes from the scheduled pickup time as the acceptable standard. However, many times the customer does not know what the scheduled pickup time is. The new software will usually provide that information for the customer when the request is being made. This will provide an immediate increase in service quality.

LETTER 6 FROM BONNIE MATSLER - The letter makes similar comments about the problems with accessible minivan taxis.

TRI-MET RESPONSE - We appreciate this being brought to our attention. The minivans are an experiment for the taxi industry in Portland. It is clear that regular accessible vans are needed for some customers.

LETTER 7 FROM KAREN MEANEA - The letter is a followup to a phoned in comment and indicated that she had been requested to see a Tri-Met doctor as part of the registration process and then the LIFT didn't show up for the ride. She feels that she is being treated very poorly, and degraded and she is very angry.

TRI-MET RESPONSE - We are sorry for the confusion over the ride. Tri-Met asks people to see a Tri-Met doctor when determining eligibility is very difficult.

ACTION BY THE CITIZEN'S COMMITTEE ON ACCESSIBLE TRANSPORTATION (CAT)

At the regular Committee on Accessible Transportation (CAT) meeting on December 21, 1994, the CAT reviewed the 1995 Paratransit Plan Update. CAT's action is included as Attachment G.

1995 PARATRANSIT PLAN UPDATE

SECTION VI

UNRESOLVED ISSUES

The following letter documents that FTA found no unresolved issues in the 1994 Paratransit Plan Update.



U.S. Department
of Transportation
Federal Transit
Administration

REGION X
Alaska, Idaho, Oregon,
Washington

915 Second Avenue
Federal Building, Suite 3142
Seattle, WA 98174-1002
206-220-7954
206-220-7959 (fax)

MAY 10 1994

State - 3...
ADA
1.1.4
C: B Post
K. Manley

Mr. Tom Walsh
General Manager
Tri-Met
4012 S.E. 17th Ave.
Portland, OR 97202

Re: 1994 ADA Paratransit Plan
Update

Dear Mr. Walsh:

The Federal Transit Administration (FTA) has completed its review of the paratransit plan update submitted in accordance with the Department of Transportation's (DOT) regulation implementing the Americans with Disabilities Act of 1990 (ADA) (49 CFR Parts 27, 37, and 38). We have determined that your plan update is in compliance with the requirements of DOT's regulation.

We look forward to receiving your annual update on or before January 26, 1995.

Sincerely,

Terry L. Ebersole

TL Terry L. Ebersole
Regional Administrator

1995 PARATRANSIT PLAN UPDATE

SECTION VII

OTHER ISSUES

1. Tri-Met has provided the complementary paratransit service in the Molalla Transportation District since January 26, 1992 and will continue to provide that service for grandfathered rides through June 30, 1995. The Molalla Transportation District is in the process of determining its ADA responsibility to provide complementary paratransit service in the Molalla District. The Molalla Transportation District is also developing its own Paratransit Plan Update and is no longer jointly submitting a plan with Tri-Met. Consequently this submittal is solely a Tri-Met document.
2. Paratransit service to customers further than 3/4 mile from the Tri-Met fixed-routes will be evaluated over the next year. ~~Following this evaluation and discussion with the CAT, the service may be reduced or eliminated.~~ This will have no effect on ADA mandated service provided by Tri-Met.
3. Tri-Met releases Draft Paratransit Plan Updates, has public hearings and adopts the plan prior to the end of 1994. The numbers for 1994 are, therefore, estimates on the draft plan. When possible, those "estimates" will be updated to "actual" prior to the submission of the plan to FTA on or before January 26, 1995. Some numbers for 1993 in last year's plan have been changed because the numbers used last year were estimates. Tri-Met suggests that the tables should list the numbers for the year just ended as "estimates" since it is impossible to have a public process with "actual" numbers before the year is up.
4. The fare for the LIFT program was raised from \$.50 to \$.75 in September of 1994. The LIFT fare continues to meet the ADA requirements.
5. In 1994 Tri-Met started operation of a brokerage for Title 19 (Medicaid) rides in the Tri-County area. This substantially increased the total projections for paratransit service and ADA service since it is presently estimated that 33% of the Medicaid rides would qualify as ADA paratransit service.
6. A new registration form using self certification was put in place in 1994. The new registration is included in attachments.

**FURTHER DOCUMENTATION CONTAINING WRITTEN COMMENTS
ARE AVAILABLE UPON REQUEST**

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 95-2058 FOR THE PURPOSE OF ALLOCATING I-205 BUSWAY WITHDRAWAL FUNDS TO SOUTH/NORTH ENVIRONMENTAL IMPACT STATEMENT AND PRELIMINARY ENGINEERING AND AIRPORT GROUND ACCESS STUDY AND RESCINDING TRI-MET OBLIGATION TO REPAY PREVIOUS I-205 BUSLANE WITHDRAWAL GRANT

Date: December 27, 1994

Presented by: Andrew Cotugno

PROPOSED ACTION

This resolution provides for the allocation of the final \$12,605,958 of the I-205 Buslane Withdrawal funds to support the DEIS, FEIS and Preliminary Engineering of the South/North Transit Corridor project.

TPAC has reviewed this proposed allocation and recommends approval of Resolution No. 95-2058.

FACTUAL BACKGROUND AND ANALYSIS

The Surface Transportation Act of 1987 allowed the Portland region to withdraw \$16,366,283 which had been dedicated to the completion of a busway along I-205 between Airport Way and Foster Road. The Act also permitted transfer of the funds to a light rail transit project in the I-205 corridor. Metro Resolution No. 89-1094 asked the Governor to request the funding withdrawal and the flexibility to use the funds for light rail purposes and this request was granted by the federal Department of Transportation.

Metro Resolution No. 92-1584 approved seeking Congressional action to provide flexibility in the use of the withdrawn buslane funds and allow their use for alternative transit projects in the Portland region. The resolution includes language that retains the JPACT commitment to use the I-205 buslane withdrawal funds for LRT purposes in the I-205 corridor and requires JPACT approval to shift funds out of the I-205 corridor. The resolution further establishes that final allocation of these funds will be made based upon the I-205/Milwaukie Preliminary Alternatives Analysis together with an implementation funding strategy.

At the conclusion of the I-205/Milwaukie Preliminary Alternatives Analysis, Metro Council passed Resolution No. 93-1784 which adopted the Milwaukie Corridor as the priority corridor for light rail transit development serving Portland and Clackamas County, and directed staff to prepare intermediate term improvement strategies in the I-205 Corridor. Tri-Met and Metro staff together with C-TRAN, Clackamas County, City of Portland and Port of Portland have prepared an analysis of transit improvements in the I-205 Corridor. This study concluded that there are no

potentially cost-effective bus priority capital improvements needed in the Oregon portion of the I-205 Corridor prior to 2010.

At the same time, additional study was undertaken evaluating light rail transit alternatives serving the Portland International Airport (PDX). Based on this study and on the short and medium term plans for accommodating growth at PDX, the Port of Portland Commission endorsed beginning Alternatives Analysis on a PDX light rail line following completion of the South/North Environmental Impact Statement.

The original \$16,366,283 has been reduced as a result of a series of regional and federal actions:

- In 1992, Metro received a \$425,000 grant from FTA for the I-205 portion of the I-205/Milwaukie Preliminary Alternatives Analysis.
- In 1993, the region sought and received approval for \$1.6 million in I-205 Buslane Withdrawal funds as part of the funding package for the South/North Alternatives Analysis. A condition of the regional approval to use these funds for South/North was that the I-205 funds would be replaced by an alternate Tri-Met source if it was determined that the funds were needed for transit capital improvements in the I-205 corridor.
- In 1994, the adoption of the FY 1995 Transportation Improvement Program included a provision (consistent with Congressional action) to decrease the I-205 Buslane Withdrawal account by \$1,661,718 and to allocate those funds to a South/North Corridor project account.
- The I-205 Buslane Withdrawal account now stands at \$12,605,958 (minus \$73,607 of unappropriated federal funds).

This resolution would make \$12,379,565 of these withdrawal funds available to use for South/North Preliminary Engineering. Securing additional DEIS/FEIS and PE funding at this time is critical due to an amendment made to the South/North budget by Metro Council and a change in FTA policy which allows the region to commence PE concurrently with the beginning of the Draft Environmental Impact Statement (DEIS). The additional funds will allow the region to move rapidly forward towards construction of the South/North project if the DEIS Locally Preferred Alternative (LPA) concludes with the Build alternative. The DEIS and PE are planned to begin in the spring of 1995 and secured funds will help to expedite the study process. Preliminary Engineering and FEIS should be concluded by late 1997.

In addition, this resolution would dedicate up to \$300,000 to a detailed study of airport ground transportation. This study has two clear objectives: 1) to develop a strategy for implementation of public transit service improvements (both Tri-Met and

C-TRAN) leading up to the eventual implementation of light rail service to PDX; and 2) to prepare a comprehensive strategy on ground transportation that seeks to maximize the ability of non-auto modes to serve the needs of airport employees and airport users. TPAC has suggested that the Port of Portland provide the 15 percent local match for the airport ground access study.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 95-2058.

95-2058.RBS/lmk
12-27-94

I-205 CORRIDOR ACTION PLAN CONCLUSIONS AND RECOMMENDATIONS

I. I-205 Corridor Service Plan and List of Potential Capital Improvements

Service Plan

The attached schematic diagram and tables summarize a potential long range service plan developed for purposes of this analysis for the I-205 Corridor. Routes are configured to serve major trip generators and transfer points in the corridor in a circumferential travel movement. Service levels were based on TSM networks designed for the South/North Corridor Transit Study Pre-Alternatives Analysis, and were matched to projected 2010 travel demand in the corridor.

The highest service levels are between Gateway and Vancouver Mall, with the majority of that service being provided by C-Tran as connecting bus service to Gateway and serving the Airport. The Airport would be served by nine peak hour trips and six trips per hour off-peak between 2000 and 2010. Service levels between Gateway and Oregon City range between three and eight trips in the peak between 2000 and 2010.

Capital Plan

The following table lays out capital improvements assumed to facilitate bus service in the corridor, along with their capital cost.

Improvement	Priority	Cost	Peak Bus Volumes
Year 2000 Priorities			
18th Avenue Ramps	First	\$42,000	4
Parkrose ramp meter/Q bypass	First	\$42,000	22
Gateway double left turn to Glisan	First	\$2,000	25
Signal Coordination/99th and Glisan	First	\$50,000	25
Division Ramp Signals	First	\$50,000	5
Parkrose Signal Coordination	Second	\$200,000	22
Total		\$386,000	
Year 2010 Priorities			
Vancouver Mall TC Ramp	First	\$2,836,400	29
Division Ramp Stop	First	\$30,000	8
Powell Ramp Stop	First	\$30,000	8
Foster/Woodstock Ramp Stop	First	\$30,000	8
Clackamas TC Ramp Meter/Q Bypass	First	\$42,000	8
18th Av Q Bypass	Secondary	\$42,000	6
Holgate Freeway Stop	Secondary	\$150,000	8
Special Clack TC Roadway	Secondary	\$348,200	8
Total		\$3,508,600	

Improvement	Priority	Cost	Peak Bus Volumes
Post-2010 Improvements			
Lincoln Tunnel	First	\$672,100	8+
Highway 212 Ramp Stop	First	\$30,000	5+
HOV Lanes	Second	\$3,354,000	30+
Busway	Second	\$5,171,500	8+
Parkrose P&R New Road	Third	\$370,000	27+
Total		\$9,597,600	

II. Findings of Conclusions

A. I-205 Improvements

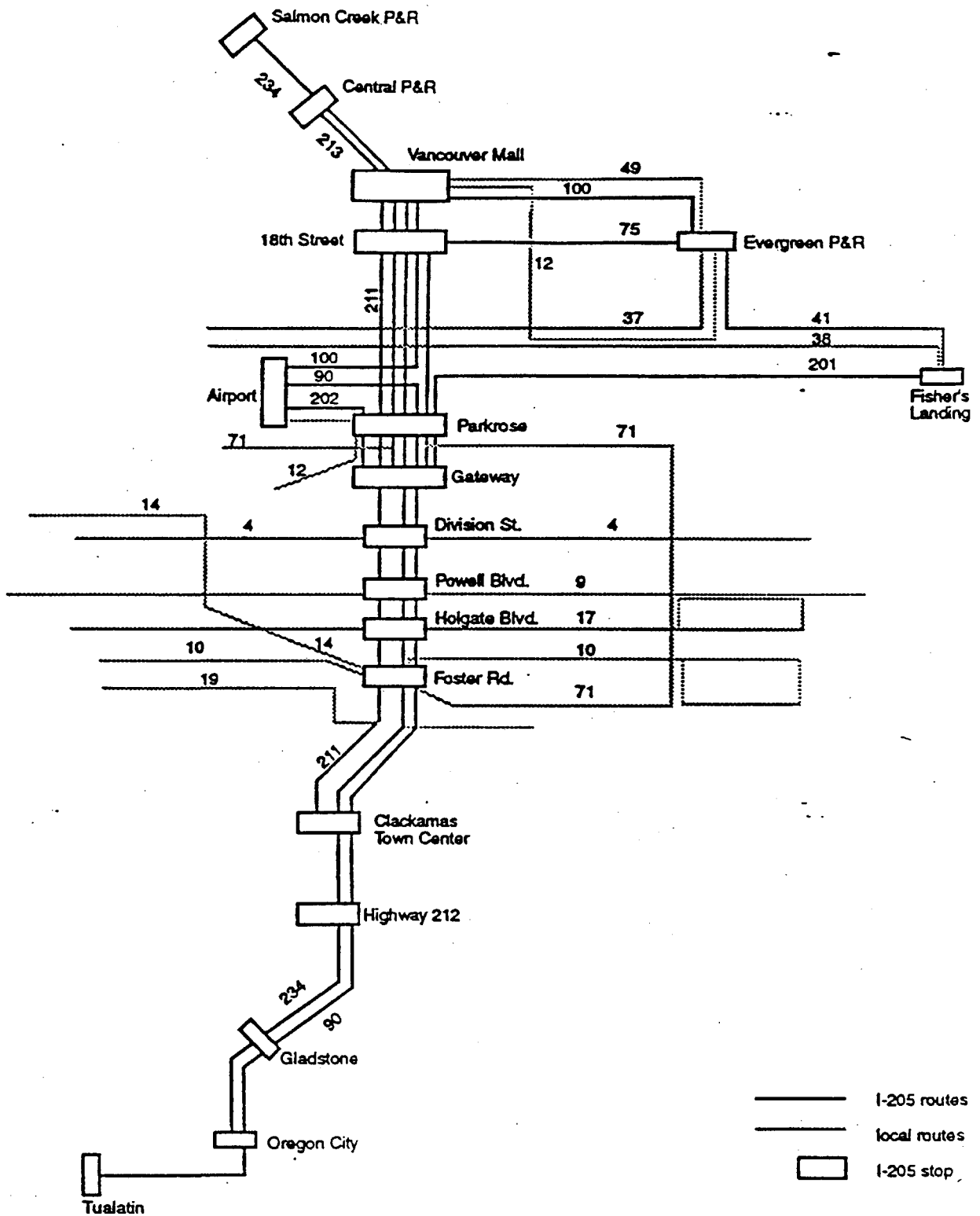
1. Tri-Met does not currently have bus service operating along the I-205 circumferential corridor, nor is any currently proposed. I-205 service was considered in last year's Annual Service Plan and was not implemented due to lack of interest from the public and low ridership potential.
2. Service levels projected to meet demand in the BRW report increase from 20 to 30 buses in the peak between Gateway and Vancouver Mall between 2000 and 2010. Peak bus volumes between Gateway and Oregon City would range from three to eight buses per hour between 2000 and 2010.
3. Of the service proposed for 2000 between Gateway and Vancouver Mall, 18 of 25 peak period trips are for C-Tran buses. In 2010, 25 of 30 buses are C-Tran Buses.
4. In the peak period, C-Tran would provide four peak buses to the Airport, and Tri-Met would provide five for a total of nine peak period buses to the Airport in both 2000 and 2010. In the off-peak, four Tri-Met and two C-Tran buses would provide service each hour to the Airport.
5. Potential capital improvements in the I-205 Corridor would facilitate increased speed and reliability of operations.
6. The AASHTO "bus uses of highways" standard (see attached table) for bus priority treatments recommends capital improvements to improve operations based on certain peak and daily bus volumes. Based on the BRW projections for Tri-Met and C-Tran service, any level of improvement would not likely be needed until at least the year 2000 between Gateway and Vancouver Mall and 2010 south of Gateway.

B. I-205 Context in South/North Project

1. South/North LRT is the region's number one transit funding priority after the Westside and Hillsboro project are fully funded.
2. Swift completion of the PE concurrently with the DEIS and FEIS is required to meet the aggressive schedule for FTA funding mandated by the ISTEA reauthorization in late 1996. Voter approval of \$475 million in G.O. Bonds for Oregon local share heightens this sense of urgency.
3. Because the South/North project is moving into PE sooner than originally anticipated, funds need to be identified for this effort that are readily accessible.
4. The I-205 E(4) interstate transfer funds can be transferred to South/North to fund PE and other pre-construction work for the project.
5. The Region risks losing the E(4) money if we don't move to spend it quickly.

III. Recommendations

1. The possibility of future service levels of up to 30 peak hour buses along a small part of the I-205 corridor does not warrant withholding any funding from the E(4) account at this time based on this level of analysis. At such time that I-205 capital improvements are required, Tri-Met and C-Tran will prioritize them along with all other requests for capital and service improvements and fund them if money is available and if they prove to be a cost effective investment for the two Districts.
2. The transfer of the E(4) funds to the South/North project should be made at this time. These funds are a critical revenue source for South/North LRT project pre-construction activities, and provide a readily available funding source, against which FTA could issue a grant or a Letter of No Prejudice.
3. Approximately \$200,000 to \$300,000 should be awarded to facilitate a service planning study of airport transit service requested by the Port of Portland. The study could be performed by a consultant, Tri-Met, C-Tran or the Port, or jointly among these agencies.



**Table 3.1
Peak/Off-Peak Headways and Volumes**

Route	Peak/Off-Peak Headways (In Minutes)				
	1993	1995	2000	2005	2010
75X Evergreen Express	10/60	10/60	10/60	10/60	10/60
76L Vancouver Mall Limited	30/ -	30/ -			
90o Oregon City - Airport			20/30	20/30	
90T Tualatin - Airport					20/30
201X Fisher's Landing - Gateway			10/ -	10/ -	10/ -
211X Vancouver Mall - Clackamas TC			30/60	30/60	20/30
213X Central County - Gateway			15/ -	15/ -	15/ -
234X Salmon Creek - Gateway				30/60	
234X Salmon Creek - Oregon City					30/60
202 Airport - Gateway Shuttle		30/30	30/30	30/30	30/30
100L Evergreen to Airport				15/30	15/50

Route	Peak/Off-Peak Volumes (Per Hour)				
	1993	1995	2000	2005	2010
75X Evergreen Express	6/1	6/1	6/1	6/1	6/1
76L Vancouver Mall Limited	2/ -	2/ -			
90o Oregon City - Airport			3/2	3/2	
90T Tualatin - Airport					3/2
201x Fisher's Landing - Gateway			6/ -	6/ -	6/ -
211X Vancouver Mall - Clackamas TC			2/1	2/1	3/2
213X Central County - Gateway			4/ -	4/ -	4/ -
234X Salmon Creek - Gateway				2/1	
234x Salmon Creek-Oregon City					2/1
202 Airport to Gateway		2/2	2/2	2/2	2/2
100L Evergreen to Airport				4/2	4/2

Year

I-205	1993	1995	2000	2005	2010
-------	------	------	------	------	------

Salmon Creek					
Central					2
Van Mall			4	4	6
Airport Way	2	2	20	24	29
Parkrose	2	4	22	22	27
Gateway	8	10	25	25	30
Division St.			5	5	8
Powell Blvd.			5	5	8
Holgate Blvd.			5	5	8
CTC			3	3	5
Hwy 212			3	3	5
Gladstone			3	3	5
Oregon City			3	3	5
Tualatin					3

TABLE 43
SUMMARY OF WARRANTS FOR ARTERIAL-RELATED BUS PRIORITY TREATMENTS

TYPE OF TREATMENT	PLAN- NING PERIOD (YR)	MINI- MUM DAILY BUS VOLUME	RANGE IN ONE-WAY PEAK-HOUR VOL.		STREET CHARACTERISTICS	RELATED FACTORS
			BUS	PASS.		
Bus streets	5-10	200	20-30	800-1,200		Commercial frontage. Part of CBD plan. Available alternative traffic routes.
CBD curb bus lanes, main street	1-5	200	20-30	800-1,200		Commercial frontage.
Curb bus lanes	1-5	300	30-40	1,200-1,600	At least 2 lanes available for other traffic in same direction.	
Median bus lanes	1-5	600	60-90	2,400-3,600	At least 2 lanes available for other traffic in same direction. Ability to separate vehicular turn conflicts from buses.	
Contra-flow bus lanes, short segments	1-5	200	20-30	800-1,200		Essential part of bus routing pattern necessary to serve generators or reduce bus miles.
Contra-flow bus lanes, extended	1-5	400	40-60	1,600-2,400	At least 2 lanes available for other traffic in opposite direction. Signal spacing greater than 500-ft intervals.	Ability to provide service.
Bus preemption of traffic signals	1-5	100	10-15	400-600	Where not constrained by pedestrian clearance or signal network requirements.	
Special bus signal and bus-actuated signal phases	1-5	50	5-10	200-400	Bus lanes at access points to busways or terminals; or where special bus turning movements must be accommodated.	
Special bus turn provisions	1-5	50	5-10	200-400	Wherever vehicular turn provisions are located along bus routes.	
Bus turnouts	1-5	100	10-15	400-600	Points of major passenger loadings on streets with more than 500 peak-hour autos using curb lanes.	
Bus shelters	1-5	—	—	—		100 or more boarding and/or transferring passengers per day and/or daily person waiting time is at least 1,000 min.

lane legislation will also have important bearing on implementation feasibility. Full official and public support is essential. For these reasons, the suggested warrants must be construed as broad-gauged guides in developing specific urban needs.

BUS STREETS AND AUTO-FREE ZONES

Bus streets represent a major commitment to downtown transit and development. They fully separate bus and car traffic, increase bus service reliability, enhance bus identity, and provide downtown distribution for regional express

routes. They enhance pedestrian access, and, when accompanied by amenities, can improve the downtown environment.

In the United States—and to some extent in Europe—bus streets and auto-free zones are motivated by environmental planning considerations rather than by bus flow requirements alone. The two best-known American examples are Nicollet Mall in downtown Minneapolis, and the 63rd and Halsted bus streets in Englewood (Chicago). Additional CBD bus streets have been proposed for Atlanta, Dallas, Hartford, St. Louis, and Vancouver. Short sections

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ALLOCATING I-205)	Resolution No. 95-2058
BUSWAY WITHDRAWAL FUNDS TO SOUTH/)	
NORTH ENVIRONMENTAL IMPACT STATEMENT))	Introduced by
AND PRELIMINARY ENGINEERING AND)	Rod Monroe, Chair
AIRPORT GROUND ACCESS STUDY AND)	JPACT
RESCINDING TRI-MET OBLIGATION TO)	
REPAY PREVIOUS I-205 BUSLANE WITH-)	
DRAWAL GRANT)	

WHEREAS, The Federal Highway Administration approved withdrawal of the I-205 buslanes, providing \$16,366,283 for light rail transit in the I-205 corridor; and

WHEREAS, In 1992, \$425,000 of the I-205 buslane funds were awarded in a grant from the Federal Transit Administration (FTA) for the I-205 portion of the I-205/Milwaukie Preliminary Alternatives Analysis; and

WHEREAS, Resolution No. 93-1784 adopted the Milwaukie Corridor as the priority corridor for light rail transit development serving Portland and Clackamas County and directed staff to prepare intermediate term improvement strategies in the I-205 Corridor; and

WHEREAS, Metro Council adopted Resolution No. 93-1845A which directed Metro staff to submit an application to FTA for up to \$1.6 million in I-205 Busway Interstate Transfer funds and amended the TIP to include those funds in the \$8.25 million South/North AA revenue budget; and

WHEREAS, Resolution No. 93-1845A also requested that Tri-Met commit an amount equal to the I-205 Buslane Withdrawal fund grant (up to \$1.6 million), and that such funds be used to replace the

I-205 buslane grant funds if those funds were needed for transit capital improvements within the I-205 corridor; and

WHEREAS, Metro Council adopted Resolution No. 94-1964 which adopted the FY 1995 Transportation Improvement Program (TIP) for the Portland metropolitan area, which includes a provision to decrease the I-205 Buslane Withdrawal Account by \$1.66 million and to allocate those funds to the South/North Corridor project; and

WHEREAS, Resolution No. 92-1584 established that final allocation of the I-205 buslane funds be made based upon the I-205/Milwaukie Preliminary Alternatives Analysis together with an implementation funding strategy; and

WHEREAS, Metro and Tri-Met in conjunction with C-TRAN have completed an I-205 Action Plan which evaluated bus priority capital needs in the I-205 Corridor; and

WHEREAS, The I-205 Action Plan concluded that there are no potentially cost-effective bus priority capital improvements needed in the Oregon portion of the I-205 corridor in the intermediate term (2010); and

WHEREAS, The Port of Portland has endorsed pursuing an airport light rail connection following completion of the South/North Transit Corridor Study; and

WHEREAS, The South/North project derives from a conforming Regional Transportation Plan and Transportation Improvement Program; now, therefore,

BE IT RESOLVED

That the Metro Council hereby declares:

1. Metro staff is directed to submit an application to the Federal Transit Administration for \$12,605,958 to provide funds for completing the Tier II DEIS and FEIS and for initiating Preliminary Engineering on the South/North Transit Corridor.

2. Metro staff is further directed to submit an application to FTA for up to \$300,000 for a comprehensive study of ground, non-auto, and non-freight access to Portland International Airport (PDX). The actual amount required is dependent on the work scope. If the amount is less than \$300,000, any residual amount would be made available to the South/North study.

3. Metro staff is further directed to cooperate with local governments, ODOT, Tri-Met, C-TRAN, Southwest Washington RTC and Port of Portland staff to prepare and execute a work plan for the study of ground access to PDX which should include, but shall not be limited to, existing Tri-Met bus service, new Tri-Met and C-TRAN bus service, taxi operations, hotel shuttle services, other private shuttle services, bicycle access, pedestrian connections, short-term parking, long-term parking, remote-site parking (private and public) and other issues related to airport ground access. The study participants shall coordinate this intermediate range study with long-range plans to operate high-capacity transit to PDX.

4. The obligation of Tri-Met to repay the \$1.6 million I-205 Buslane Withdrawal grant awarded to the South/North Transit Corridor Study is rescinded.

5. Metro staff is directed to amend the Transportation Improvement Program to reflect transfer of the I-205 Buslane

funds to the South/North DEIS/PE and airport ground access study.

ADOPTED by the Metro Council on this _____ day of _____,
1995.

Ruth McFarland, Presiding Officer

JC:lnk
95-2058.RES
12-27-94

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 95-2072 FOR THE PURPOSE OF ENDORING THE OREGON TRANSPORTATION FINANCE PACKAGE

Date: January 3, 1995

Presented by: Andrew Cotugno

PROPOSED ACTION

Endorsement of the Oregon Transportation Finance Package establishing a comprehensive, multi-modal funding strategy for consideration by the 1995 Oregon Legislature.

FACTUAL BACKGROUND AND ANALYSIS

The Oregon Transportation Finance Coalition is comprised of representatives from the Oregon Department of Transportation (ODOT), the Association of Oregon Counties (AOC), the League of Oregon Cities (LOC), the Oregon Public Ports Association and the Oregon Transit Association. They have developed a proposal for consideration by the 1995 Oregon Legislature to help fund critical statewide transportation needs which include the following elements:

1. A 2¢ gas tax increase to be implemented in January 1996 and 1997 (2 x 2) to be shared between ODOT, the counties and cities on a 50/30/20 split for state and local road and bridge needs.
2. A 2¢ gas tax increase to be implemented in January 1996 and 1997 (2 x 2) to fund an ODOT-administered bridge seismic retrofit program on the basis of criticality of lifelines regardless of jurisdiction.
3. Recognition of ODOT's updated study of truck cost responsibility calling for a decrease of the truck's share of the Highway Trust Fund from 38.7 percent to 37.5-38.0 percent. At this rate, the truck weight-mile tax would increase 5.0-8.5 percent with the above referenced gas tax increases.
4. An increase in the statewide vehicle registration fee of \$20/year dedicated to mass transit and local road needs. This would be allocated to Metropolitan Planning Organizations (MPOs) and counties and could be used for roads if all transit needs are met. This is only likely in the rural counties of Oregon.
5. Referral of a Constitutional Amendment to the voters to enable new vehicle fees (including the above referenced vehicle registration fee increase) excluding the gas tax and truck weight-mile tax to be used for transit.

6. Adoption of a lottery funding package for non-highway purposes statewide, including South/North LRT, high-speed rail, port improvements, aviation improvements, and freight rail improvements.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 95-2072.

ACC:lmk
1-3-95
95-2072.RES

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ENDORSING)
THE OREGON TRANSPORTATION)
FINANCE PACKAGE)

RESOLUTION NO. 95-2072

Introduced by
Rod Monroe, Chair
JPACT

WHEREAS, Metro adopted the Regional Transportation Plan by Ordinance No. 92-433 identifying a comprehensive system of transportation improvements; and

WHEREAS, Metro adopted Resolution No. 94-2009 establishing a 5 and 10-year transportation finance strategy; and

WHEREAS, Metro has participated with the Oregon Transportation Finance Coalition in the development of a state finance proposal; now, therefore,

BE IT RESOLVED,

That the Metro Council endorses the Oregon Transportation Finance Package as reflected in Exhibit A.

ADOPTED by the Metro Council this _____ day of _____,
1995.

Ruth McFarland, Presiding Officer

Proposed Oregon Transportation Finance Package

The Oregon Transportation Finance Committee is a group of Oregonians made up of representatives from the Association of Oregon Counties, the League of Oregon Cities, Oregon Department of Transportation, the Oregon Public Ports Association and the Oregon Transit Association.

The Committee has been working since the end of the last legislative session to put together a comprehensive transportation finance package for the 1995 session that has a broad base of public support. It would fund only the state's highest priority needs.

Input from consumers, providers and interest groups across the state has been incorporated into the funding package that follows.

Highlights

- * An increase in the state gas that will fund critical road and bridge maintenance, safety and capacity projects.
- * Fifty-percent of the new gas tax fees would go directly to cities and counties for local road and bridge projects.
- * A source of stable funding for public and special transportation.
- * An amendment to the Oregon Constitution to allow flexibility in the way fees on the use of the automobile can be used.
- * A lottery request to finance aeronautics, freight, rail, light rail and freight mobility projects linked to economic development.

Benefits

37% of the package for road maintenance, safety and improvements.
 25% of the package for earthquake retrofit of bridges.
 25% improvements for public and special transportation for elderly/disabled.
 13% for improved rail, freight and airport facilities.

Cost

- * 2-cent gas tax increase in each of two years for roads.
- * 2-cent gas tax increase in each of two years to strengthen Oregon bridges against earthquakes.
- * \$20 increase in passenger vehicle registration for public transportation.
- * The package would cost the average Oregon driver less than \$6 per month.

Package Elements

Roads and Bridges:

- * A 2 cent gas tax increase (January 1996, and 1997) raises \$94 million per year (fully implemented). The priority road and bridge needs that are unfunded in the next twenty years total \$19.2 billion.
- * Will fund high-priority road and bridge maintenance and construction projects.
- * Will fund high-priority "freight mobility projects" linked to expanded commerce.
- * Fifty-percent of the new dollars collected are passed through directly to cities and counties for local road and bridge maintenance and improvements.

Earthquake Retrofit for Bridges:

- * A 2 cent gas tax increase (January 1996, and 1997) for seismic retrofit raises \$70 million per year. Estimate for retrofitting Oregon bridges is \$1.2 billion.
- * Will finance strengthening Oregon bridges against earthquakes.
- * Will retrofit bridges connecting lifeline routes and routes critical to commerce.

Public and Special Transportation:

- * \$20 annual increase in passenger vehicle registration fee raises \$60 million annually.
- * Constitutional amendment to allow fees on the use of the automobile to be used for public transportation.
- * Funding distributed to counties and transit and transportation districts for public transportation and special transportation for elderly and disabled citizens. Dollars may also be used for roads if public transportation needs are met.

Airport Improvements:

- * \$7 million request could leverage up to \$60 million in federal funds.
- * Funding for expansion and improvement of rural and urban airports.
- * Projects selected for regional balance.

Freight Mobility Improvements:

- * \$30 million lottery request (leverages \$19 million in federal funds).
- * Funding for road, rail and port projects that improve commercial links.
- * Projects selected for regional balance.

High Speed Rail, Light Rail and Other Passenger Improvements

- * \$64 million lottery request for track, terminal and service improvements for rail and intercity buses; state match for South /North light rail planning and vehicle purchase;
- * Leverages \$168 million in federal funds.

November, 1994

FLEXIBILITY

Greater flexibility in the use of transportation revenues allows the most efficient use of limited tax dollars. If priorities change and funds have been pigeon-holed for specific uses, tax money can be wasted on low priority projects with dedicated funds, while high priority projects go begging.

This finance package, which proposes to limit a constitutional amendment to vehicle registration fees for transit, while dedicating various pots of revenue for specific bridge and highway uses, is going in the wrong direction.

Even the Federal Government recognized the inefficiency and waste produced when adhering to narrow funding categories by passing the ISTEA Act of 1991, which allows far greater funding flexibility.

FAIRNESS

If you are going to ask the legislature to increase the vehicle registration fee, please be fair about it.

The proposed vehicle registration fee increase of \$20.00 a year (133%) is regressive and is extremely unfair to lower income families. Many multiple worker families are forced to own more than one vehicle to get them to their jobs. Many own clunkers called "work cars" that would not be needed if adequate public transit were available, yet they will be forced to pay registration fees that are nearly as much as the value of their cars.

We suggest that any proposal for an increase in registration fees be based on ability to pay as measured by the value of the vehicle.

For example, an annual registration fee of 1% of a vehicle's value, with the current flat fee of \$15.00 retained for vehicles valued under \$1,500 and a flat fee scale retained for commercial vehicles, could probably yield as much revenue as the proposal in the Revenue Package.

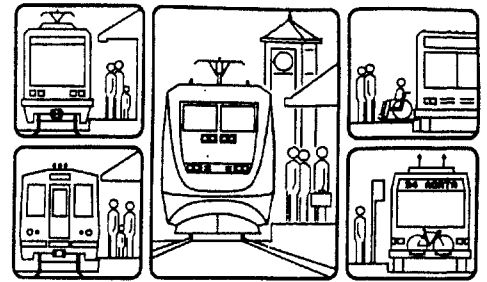
This would mean that people with cars valued over \$3,500 would pay more than the rate proposed in the Package while those with cheaper cars would pay less. This is only fair.

We ask that you give full deliberation to these thoughts before endorsing the current draft of Resolution No. 95-2072

Association of Oregon Rail and Transit Advocates

AORTA • P. O. Box 2772 • Portland, Oregon 97208-2772

Also known as OreARP • Oregon Association of Railway Passengers



January, 12, 1995

MEMORANDUM

TO: JOINT Policy Advisory Committee on Transportation

FROM: ^{FN} Fred Nussbaum, President and ^{JH} Jim Howell, Director

RE: The Oregon Transportation Finance Package being proposed by the Oregon Transportation Finance Committee.

AORTA is reluctant to support transportation legislation this year that would increase taxes, except to compensate for revenue loss due to inflation. We agree with Gov. Kitzhaber where he stated in his inaugural address "If we are to make any difference at all, we must: ...Provide good systems of transportation and telecommunications to support our economy. And we must do this with the money we now have."

More efficient use of existing tax revenues should be a significant objective for all transportation leaders in the state.

In keeping with this objective, it has been our position that the people of this state should have the opportunity to vote for a constitutional amendment that would allow all motor vehicle fees and taxes to be used "...for surface transportation projects in this state which reduce the traffic burden or pollution from motor vehicles on public roads."

And by the way, this is the position of the 13 previous Metro Councilors (see attached list of petition sponsors).

over

OFCET INITIATIVE PETITION SPONSORS

Oregonians For Cost Effective Transportation

March 28, 1993

The following *individuals* are sponsors of the OFCET Initiative Petition. Listing of the organization *does not* reflect endorsement by the organization.

1. **Michael Ackley**, Association of Oregon Rail and Transit Advocates
2. **Carolyn E. Altman**, Chair, Reclaiming Our City Streets
3. **Lloyd E. Anderson**, former Port of Portland Director & City Council member
4. **Pauline S. Anderson**, former Multnomah County Commissioner
5. **Martha Andrews**, Portland Planning Commission
6. **Keith A. Bartholomew**, Staff Attorney, 1000 Friends of Oregon
7. **Gary Blackmer**, Multnomah County Auditor
8. **Ernie Bonner**, former Planning Director, City of Portland
9. **Irene Brown**, Secty-Treas, United Seniors of Oregon
10. **Roger Buchanan**, METRO Councilor (District 10)
11. **Ron Buel**, former member, Tri-Met Board of Directors
12. **Mike Burton**, State Representative (District 17)
13. **Margaret Carter**, State Representative (District 18)
14. **Ron Cease**, State Senator (District 10)
15. **Rosabel A. Chess**, board member, NEA Retired Teachers of Oregon
16. **Barbara Clark**, City of Portland Auditor
17. **J. E. "Bud" Clark**, former City of Portland Mayor
18. **George Crandall**, Architect
19. **H. Charles Davis**, former PUC Commissioner
20. **Eleanor Davis**
21. **Jim Davis**, Legislative Director, Oregon St Council of Senior Citizens
22. **Elizabeth S. Drew**, President, Oregon Retired Educators Association?
23. **Richard Devlin**, METRO Councilor (District 4)
24. **Jim Ferner**, Bicycle Transportation Alliance
25. **John Frewing**, former member, Tri-Met Board of Directors
26. **Elizabeth Furse**, US Congress (First District)
27. **Jim Gardner**, METRO Councilor (District 3)
28. **Mike Gates**, METRO Councilor (District 5)
29. **Avel Gordley**, State Representative (District 19)
30. **William Gordon**, President, Portland Gray Panthers
31. **Charlie Hales**, Portland City Commissioner
32. **Sandi Hansen**, METRO Councilor (District 12)

71. **George D. Porter**, Board of Directors, United Seniors of Oregon
72. **Henry R. Richmond**, Executive Director, 1000 Friends of Oregon
73. **Frank Roberts**, State Senator (District 9)
74. **James G Rugelberg**, Landscape Architect
75. **Aloha Schade**, Attorney
76. **Steven R. Schell**, Attorney
77. **B. J. Seymour**, Downtown Community Association
78. **Gail Shibley**, State Representative (District 12)
79. **James E. Smith**, former President, Oregon State Council of Senior Citizens
80. **Robert W. Smith**, Legislative Chair, United Seniors of Oregon
81. **Tricia Smith**, State Senator (District 17)
82. **Dick Springer**, State Senator (District 6), Majority Leader
83. **Bob Stacey**, Planning Director, City of Portland
84. **Jeanne Staehli**, Treasurer, Oregonians For Cost Effective
85. **Al Staehli**, Architect
86. **Francis Storrs**, M.D.
87. **John Storrs**, Architect
88. **Brent Thompson**, President, Jackson County Citizens League
89. **George Van Bergen**, METRO Councilor (District 6)
90. **Ed Washington**, METRO Councilor (District 11)
91. **Judy Wyers**, Chair, METRO Council (District 8)
92. **Loren Wyss**, Chair, Tri-Met Board of Directors
93. **David Zagel**, board member, Association of Oregon Rail and Transit Advocates

Organizational Endorsements

Citizens for Better Transit
 METRO
 Assn of Oregon Rail and Transit Advocates
 (also known as Oreg Assn of Railway Passngrs)
 Oregon Chapter, Sierra Club

Oregon St Council of Senior Citizens
 Sensible Transportation Options for People
 Transit Riders Association
 United Seniors of Oregon

**METRO**

To: JPACT members and interested parties
From: *AC* Andrew C. Cotugno, Planning Director
Date: January 5, 1995
Subject: RTP Update Materials

Attached for your information are the materials relating to the RTP Update, the public involvement process and the upcoming Transportation Fair. These items will form the basis for an overview of the RTP update at the January 12 meeting, as well as a discussion of the \$27 million reserve fund and the urban arterial program:

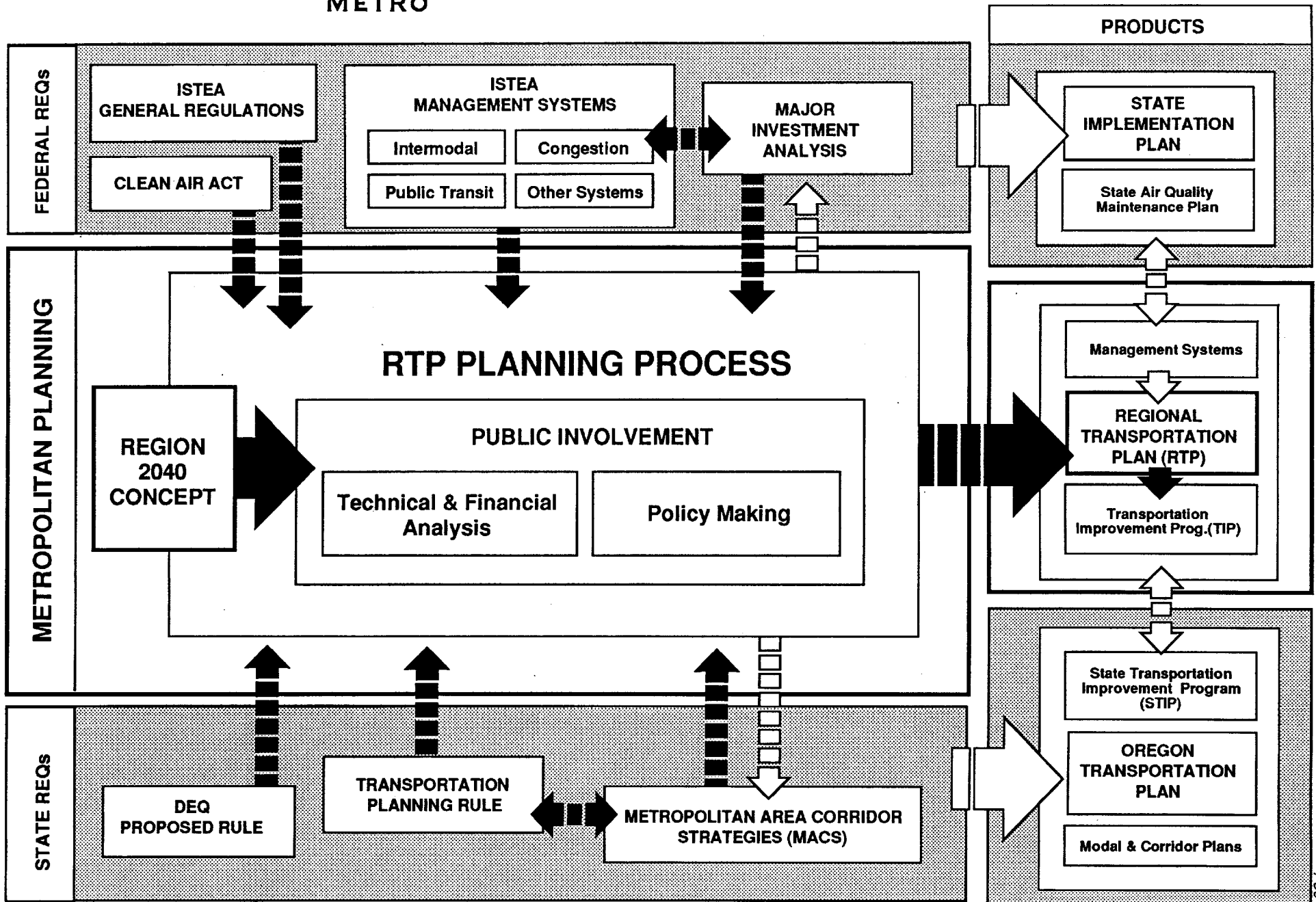
- Attachment A: Major Inputs to the RTP Update. This chart shows the various federal, state and Metro inputs into the RTP update, and how the RTP relates to other planning activities.
- Attachment B: RTP Update Structure. This chart describes the relationship of various technical and public bodies that will provide input to policymakers in the RTP update process.
- Attachment C: Overview of Public Involvement Process. This handout describes the general public involvement strategy for the RTP update, including a description of the role of the RTP Citizens Advisory Committee (CAC), an application for interested members of the public and a memorandum describing a proposed CAC selection process.
- Attachment D: RTP/Regional Framework Plan Integrated Timeline. This chart shows a simplified timeline for both the RTP and RFP processes, and a corresponding series of public involvement events and products that complement RTP and RFP activities.
- Attachment E: Transportation Fair Flier. This is a flier describing the Transportation Fair Event to be held January 28, 1995. It will be distributed to neighborhood and business associations, environmental and transportation interest groups, elected officials, previous participants in the RTP update process and other interested and affected parties.
- Attachment F: RTP Update Phase I Process. This shows Phase I of the RTP update, culminating with ISTEA compliance and preliminary work on the Transportation Planning Rule in late May 1995.
- Attachment G: RTP Financial Constraints. This handout describes how a financial constraint analysis will affect the RTP update. The financial constraint requirement is part of the federal ISTEA, and is one of the most significant changes in how this RTP update will differ from past efforts.



METRO

REGIONAL TRANSPORTATION PLAN

Major Inputs in the RTP Update

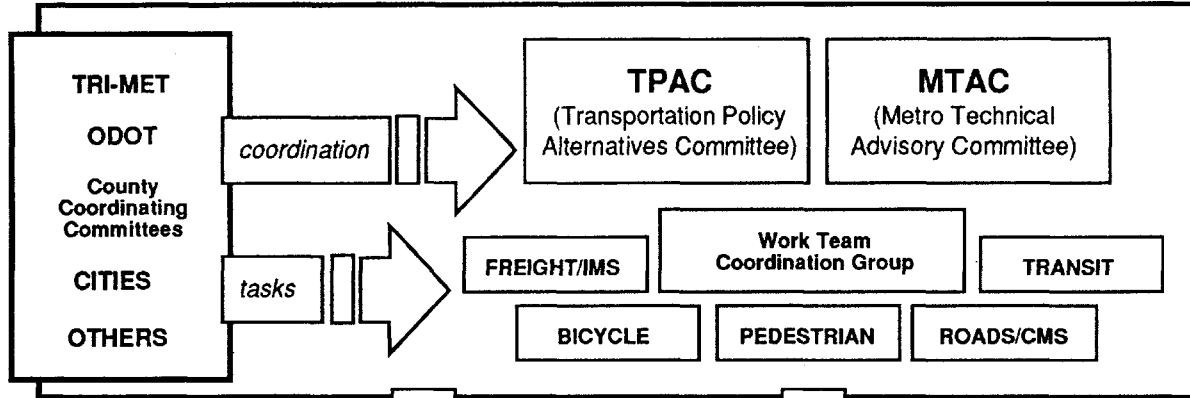




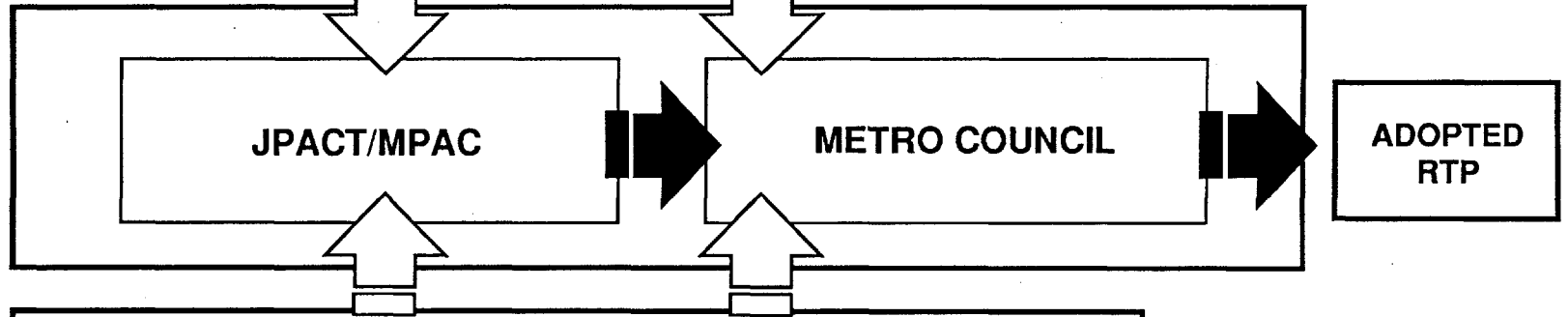
METRO

RTP Update Structure

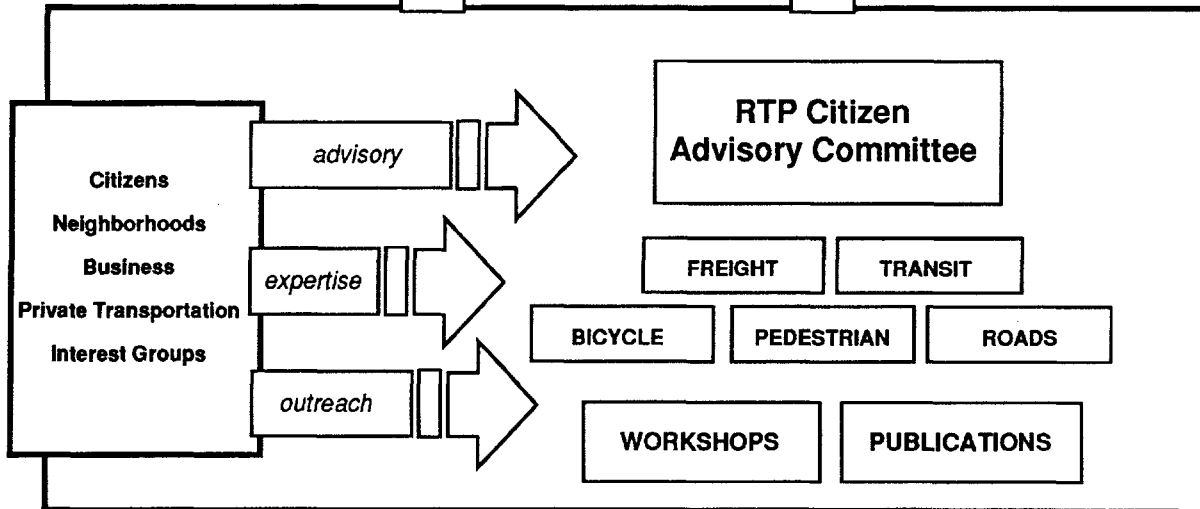
TECHNICAL



POLICY



PUBLIC



Regional Transportation Plan (RTP) Update Draft Public Involvement Plan Summary

Public Involvement Objectives

- I. To implement effective methods of information dissemination and retrieval with all communities and jurisdictions within the region.
- II. To broaden awareness of the RTP, identifying and communicating with new audiences, seeking out those traditionally underserved by the existing transportation system.
- II. To produce a final RTP document with text, graphics and maps that are accessible to the general public.
- IV. To provide complete information, timely public notice, full public access to key decisions, and to support broad-based, early and continuing involvement of the public in developing the RTP.

Public Involvement Strategy

A comprehensive public involvement process will be used to illicit greater local input and respond to the public involvement requirements of the federal Intermodal Surface Transportation Efficiency Act (ISTEA). A variety of techniques will be used to ascertain local opinions and concerns related to transportation issues. The information gathered will be widely disseminated and serve as the basis for a regional discussion of the transportation issues addressed by the RTP.

Citizens Council

The RTP Update Citizens Council will provide a broad based, long range, and regional citizens perspective on regional transportation planning issues during the process of updating the RTP. The RTP Council will be advisory to the Metro Joint Policy Advisory Committee on Transportation and will review policy recommendations made by the RTP technical work teams. Council delegates will become well versed in the issues related to the RTP by working with Metro staff to determine local concerns and opinions. The RTP Council will ensure full public access to and detailed continuing involvement in key decisions related to the development of the RTP.

Public Opinion

A combination of surveys, focus groups, and informational materials with mail back response cards will be used to determine regional public opinion on key transportation issues related to the RTP Update. The process will be carried out in cooperation with the RTP Citizens Commission and will assist them in ensuring that the RTP Update is consistent with values and issues that are important to the general public.

Outreach to communities potentially underserved by the transportation system

Public involvement staff will identify communities potentially underserved by the transportation system within the study area and conduct outreach to those groups. Public involvement activities will include but not be limited to: placing articles in relevant publications and newsletters, printing informational materials in languages other than English, and making informational presentations.

Public meetings

Meetings, workshops, hearings, and briefings will provide opportunities for disseminating information and receiving public comment throughout the process of updating the RTP. Target audiences for these meetings include but are not limited to: neighborhood and business groups, major employers, civic organizations, and elected officials.

Public Information Activities

Newsletters and Mailings

A mailing list of interested and affected parties will be developed and added to throughout the process of updating the RTP. Regular mailings and a RTP Update newsletter will keep those on the mailing list updated about the project's progress and opportunities for public involvement.

Monthly articles in local papers

Monthly transportation columns in local papers throughout the region will be used to educate the general public about the RTP and the issues involved in the RTP Update. The columns will also provide information about opportunities for public involvement.

Media and Public Relations

A media and public relations strategy will provide a means to ensure that the general public is informed about meetings, workshops, and opportunities for involvement in the process of updating the RTP. Outreach to the media will include but not be limited to: media briefings, news releases, and meeting notices.



METRO

Regional Transportation Plan Citizens Advisory Committee

Introduction

The Regional Transportation Plan (RTP) is an umbrella document that identifies a long range transportation improvement strategy coordinated with growth predictions. The RTP identifies transportation needs related to highways, arterial streets, transit, bikes, pedestrians, and freight and supports alternative transportation programs. The current RTP will be updated in 1995 to meet current state and federal requirements.

Public involvement is critical to shaping a RTP that addresses regional transportation issues and concerns. A RTP Citizens Advisory Committee (CAC) is being formed to provide a forum for detailed public review and comment during the development of the RTP update. The RTP CAC is an important part of a comprehensive public involvement strategy that includes a wide variety of techniques to inform, involve, and receive input from the public during the process of updating the RTP.

Citizens Advisory Committee Mission

The Regional Transportation Plan Citizens Advisory Committee will provide a broad based, long range, and regional citizens perspective on regional transportation planning issues during the process of updating the Regional Transportation Plan (RTP). The RTP CAC will ensure full public access to and continuing public involvement in key decisions related to the development of the RTP as required by the Federal Intermodal Surface Transportation Efficiency Act (ISTEA).

Citizens Advisory Committee Charge

1. The RTP CAC will be advisory to the Metro Council and the Metro Joint Policy Advisory Committee on Transportation (JPACT) and will review policy recommendations made by the RTP work teams.
2. RTP CAC members will serve on RTP work teams and sub-committees as needed.
3. The RTP CAC will meet once a month and more if needed. The RTP CAC will receive reports from the RTP work teams, the project manager, and other technical staff.
4. RTP CAC members will be available to meet with neighborhood groups and other public organizations within their geographical area.
5. RTP CAC members will evaluate and participate in the project's public involvement process.
6. The RTP CAC will provide opportunity for public testimony at its regular meetings.
7. It is anticipated that RTP CAC members will serve through the completion of the RTP Update up to two years.

RTP Citizens Advisory Committee Structure -- 21 members:

Community delegates:

- 1 resident delegate from the City of Portland
- 1 business delegate from the City of Portland
- 1 business community delegate from the Cities of Multnomah County
- 1 resident delegate from the Cities of Multnomah County
- 1 resident delegate from Multnomah County
- 1 resident delegate from the Cities of Clackamas County
- 1 business community delegate from the Cities of Clackamas County
- 1 resident delegate from Clackamas County
- 1 resident delegate from the Cities of Washington County
- 1 business community delegate from the Cities of Washington County
- 1 resident delegate from Washington County
- 1 delegate from Clark County/City of Vancouver

At-large delegates:

- 1 Metro Committee for Citizen Involvement member
- 2 alternative mode delegates
- 1 student/high school age delegate
- 1 freight delegate
- 1 senior citizen delegate
- 1 academic community delegate
- 1 environmental interest group delegate
- 1 transit union delegate

Nominations/Appointments:

RTP CAC community and at-large members will be nominated through a joint effort of local jurisdictions and Metro, and appointed and approved by JPACT and the Metro Council. A selection committee composed of staff from local jurisdictions and Metro will review applications and recommend a slate of nominees to JPACT and the Metro Council. The MCCI delegate will be nominated by MCCI, and appointed and approved by JPACT and the Metro Council.

Every effort will be made to appoint a balanced slate offering a broad range of perspectives, including those of groups traditionally underserved by the existing transportation systems, such as low income and minority households which may face challenges accessing employment and other amenities. Nominees should have an understanding of the varied viewpoints that exist within the area they represent and should have access to a broad network of people. Nominees will be solicited through newspaper advertisements, notices, newsletter articles, and outreach to Chambers of Commerce, neighborhood and business associations, and environmental and modal interest groups.

Meetings:

It is anticipated that the RTP CAC will meet monthly or at intervals as needed to adequately respond to the release of products and information.



METRO

Regional Transportation Plan

Citizens Advisory Committee Application Form

Name _____

Address _____

City/State/Zip _____

Phone _____

Fax _____

Employer _____

Work Address _____

Work Phone _____

Work Fax _____

Signature _____

1. Which delegate position are you applying for? (see list on page two of attached Citizens Advisory Committee description)

2. Why do you want to serve on the Regional Transportation Plan Update Citizens Advisory Committee?

3. List and describe prior and current experience in transportation related activities and issues. List the dates (month/year) served. (use additional paper if needed)

4. List and describe other civic, community and neighborhood activities that you have been involved in. Also list the advisory boards that you have served on as a volunteer. List the dates (month/year) served. (use additional paper if needed)

5. How do you hope the transportation system will change over the next twenty years?

6. a. Do you represent a particular interest group? If so, which one?

b. How will you maintain two-way communication between that group and the Citizens Advisory Committee throughout your involvement?

7. List two references who are familiar with your community and volunteer work.

Name _____
Address _____
Phone _____

Name _____
Address _____
Phone _____

8. Optional: Attach a resume.

Application Deadline: Monday, January 23, 5 p.m. (by mail or fax)

Thank you for your interest and time. We will notify you by mail of your status by February 22, 1995. The first meeting of the Citizens Advisory Committee is scheduled for March 1995. Please call Pamela Peck at (503) 797-1866 if you have questions.

Return to: Pamela Peck
Metro Planning Department
600 NE Grand Ave.
Portland, OR 97232-2736
Fax: 797-1794





METRO

DATE: January 4, 1995
TO: Mike Hoglund, Transportation Planning Manager
FROM: Gina Whitehill-Baziuk, Public Involvement Planning Supervisor
Pamela Peck, Associate Public Involvement Planner
RE: Proposed RTP CAC selection committee and selection process

The following is a proposed 7 member selection committee for the RTP Citizens Advisory Committee. RTP CAC applications are due on January 23. The selection committee will need to complete their review and selection process in February, to allow adequate time for final approval by JPACT and the Metro Council at their March 9 meetings.

Selection Committee:

Metro	Councilor Susan McLain Mike Hoglund
City of Portland	Steve Dotterer
Multnomah County	Kathy Busse
Washington County	Brent Curtis
Clackamas County	Rod Sandoz
TPAC Citizen member	Molly O'Reilly

Proposed Selection Criteria:

The following selection criteria should be used to develop a final slate of RTP CAC candidates that represent a broad spectrum of interests and opinions related to transportation issues. An effort should be made to include those traditionally underserved by the existing transportation systems, such as low-income and minority individuals. All qualified persons should be considered without regard to race, color, religion, sex, national origin, age, martial status, veteran status, political affiliation, disability, or sexual orientation.

1. Ability to develop and maintain two way communication with a broad network of people within their community. Examples of organizations that CAC members might provide links to include but are not limited to: neighborhood and business associations, senior citizen groups, minority and refugee organizations, specific modal interest groups, environmental interest groups, youth and student organizations, unions, and organizations that serve low income Oregonians.

2. Experience serving on committees or advisory boards and/or working with neighborhood, business, community, or other civic organizations.

3. Leadership skills.

4. Knowledge of transportation issues and/or experience with transportation related issues and activities.

5. Ability to provide the time needed to serve on the CAC and any subsequent subcommittees that are formed.

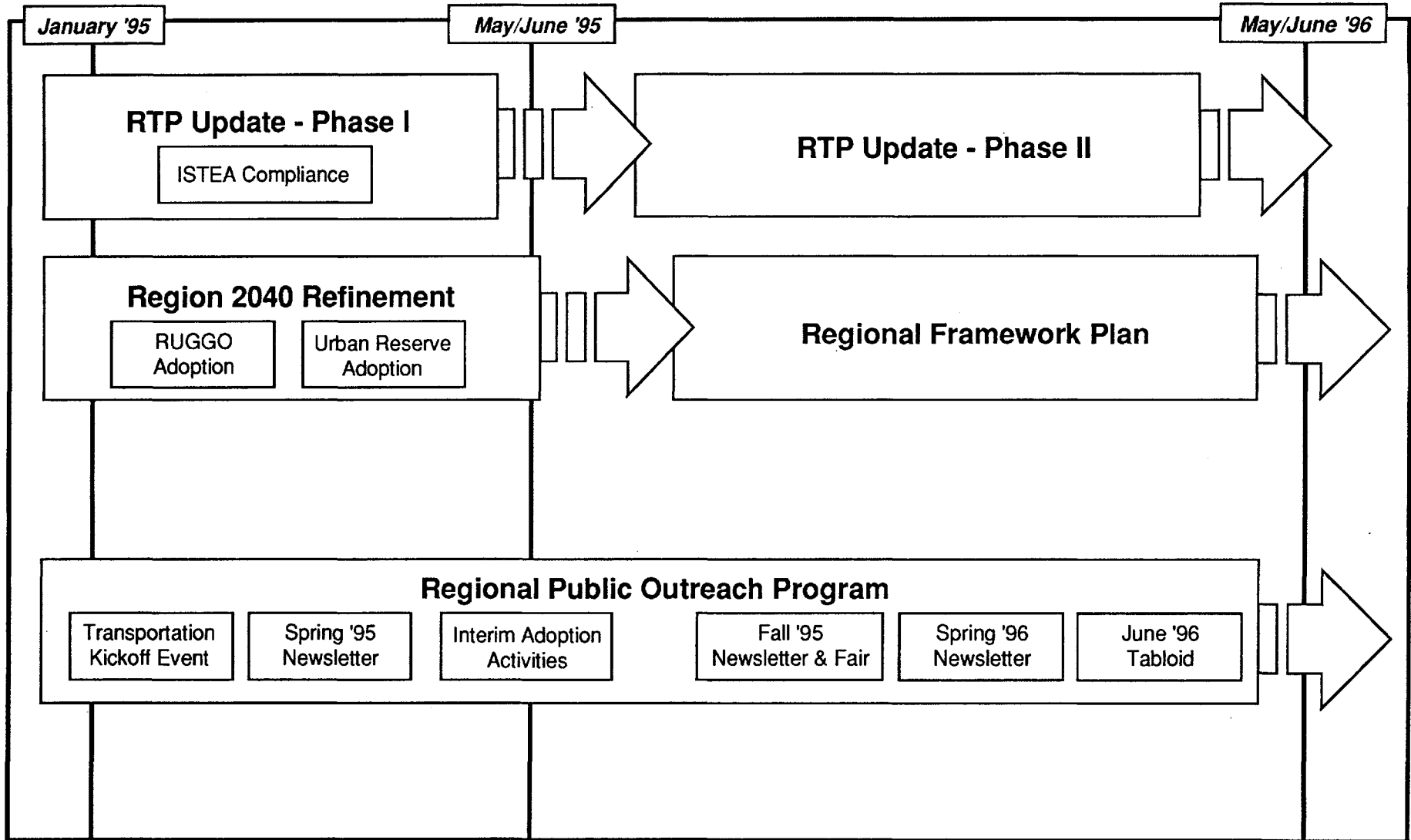
cc: Andy Cotugno
Tom Kloster



METRO

Regional Framework Plan
& RTP Update

Integrated Timeline



**Ever wonder how transportation projects get funded?
Are there transportation projects you have questions about?
Do you have ideas you would like to discuss with
local and regional planners?**

Then, don't miss...

"The Choices We Make"

A Regional Transportation Fair

**Saturday, January 28, 1995, 9 am – 1 pm
Metro Regional Center
600 NE Grand Ave., Portland**

- ◆ Share your ideas for transportation projects and improvements with city, county, and Metro planners
- ◆ Booths, speakers, and videos
- ◆ A pictorial history of 20th century transportation in Oregon
- ◆ Learn more about:
 - the Regional Transportation Plan
 - the Metropolitan Transportation Improvement Program
 - the Urban Arterial Fund
- ◆ Children's activities for ages 6 and up
- ◆ Day care may be available depending on level of interest, please call 797-1866 by January 20 to request day care .



METRO

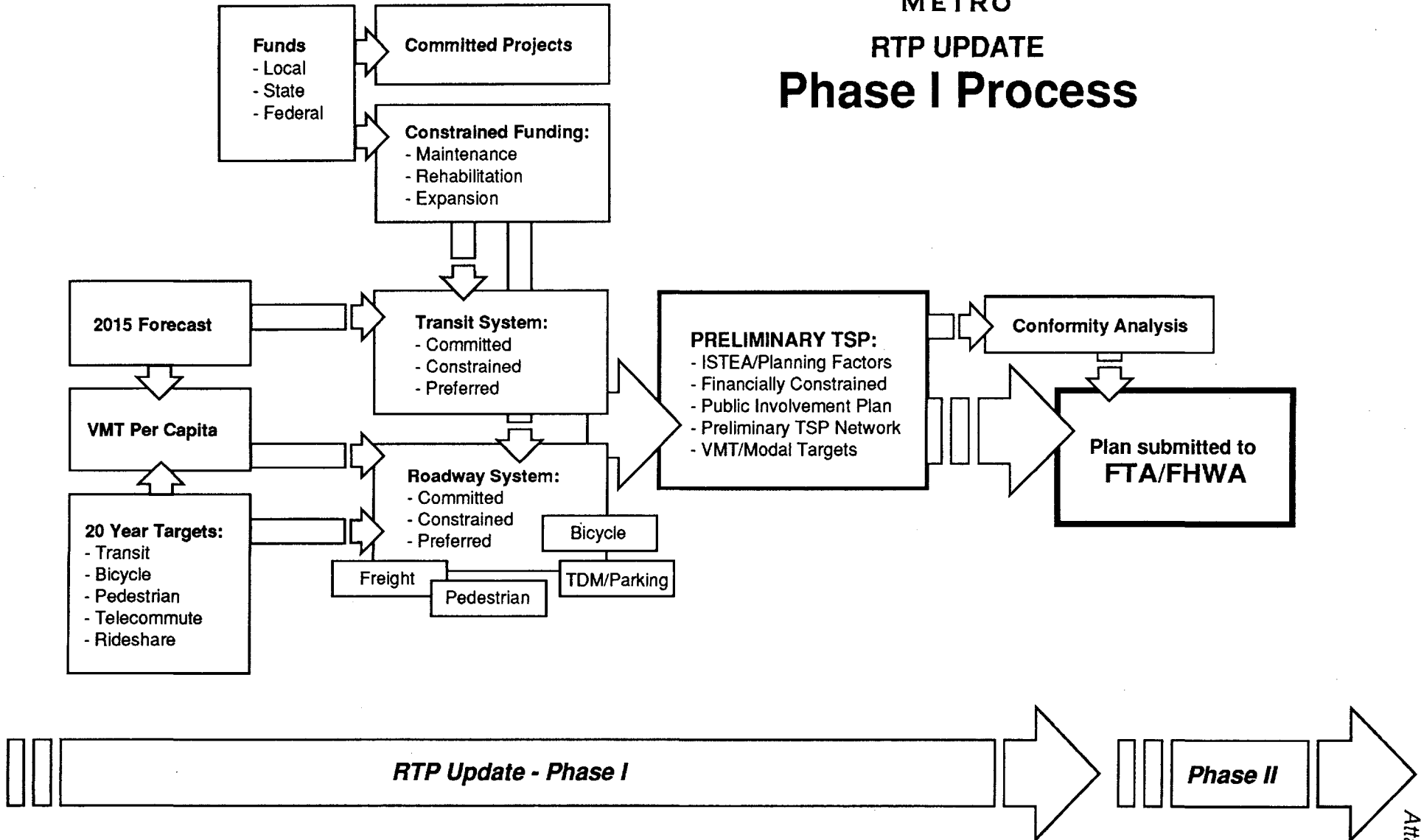
Sponsored by Metro

For more information, call 797-1866



METRO

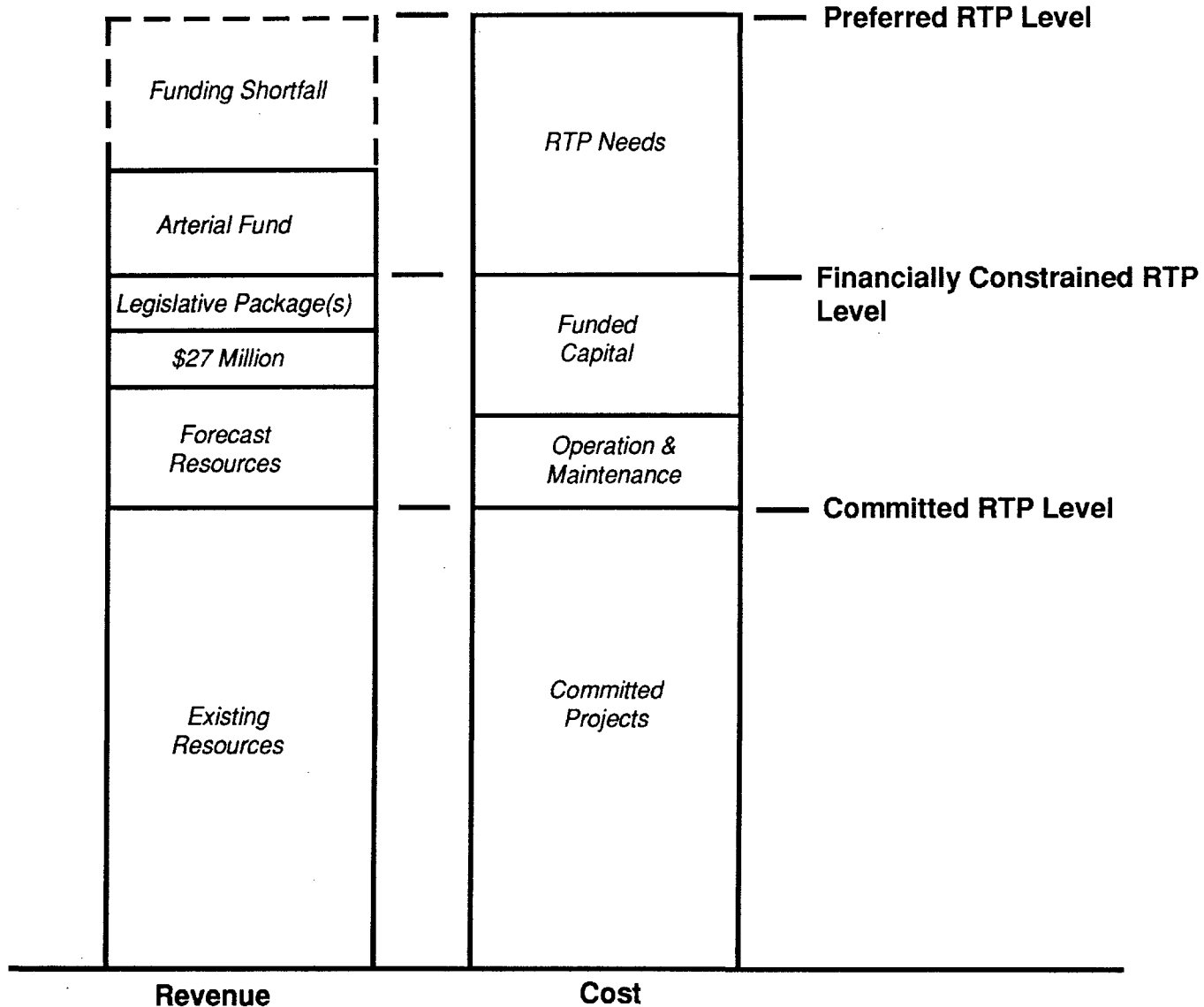
RTP UPDATE Phase I Process





METRO

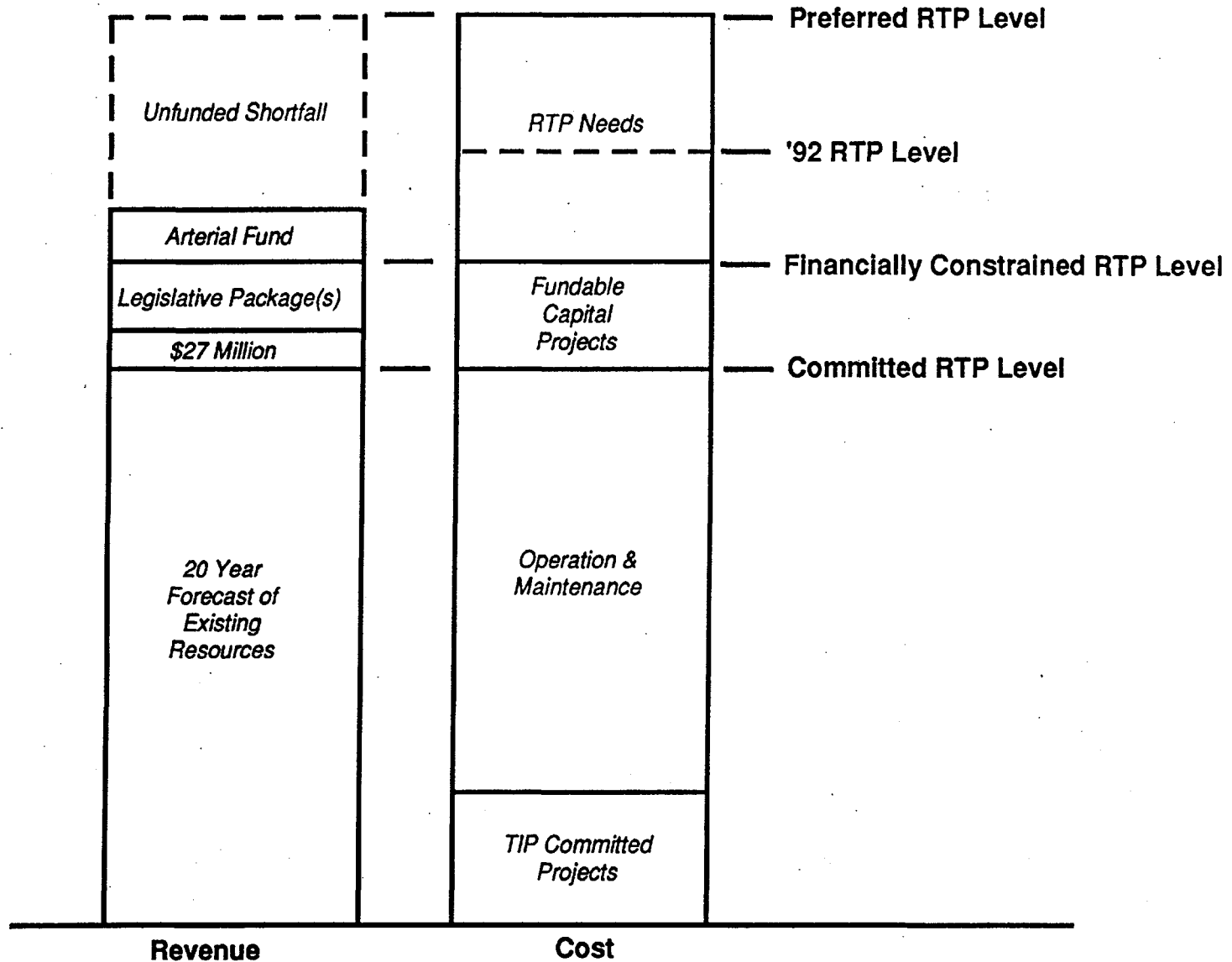
RTP Financial Constraints





METRO

RTP Financial Constraints



Andy

**STATE OF OREGON MATCHING FUNDS
FOR THE
SOUTH/NORTH LRT PROJECT**

PROSPECTUS

**PREPARED BY
STEVEN M. SIEGEL & ASSOCIATES
STOEL RIVES
PUBLIC FINANCIAL MANAGEMENT**

**PREPARED FOR
TRI-MET
OREGON DEPARTMENT OF TRANSPORTATION**

DRAFT

DECEMBER 12, 1994

STATE OF OREGON MATCHING FUNDS FOR THE SOUTH/NORTH LRT PROJECT:

Executive Summary

- A commitment of matching funds from Tri-Met, C-TRAN and the States of Oregon and Washington is needed during 1995/96 to secure an earmarking of Section 3 funds for the project in the upcoming federal transportation authorization bill.
- The State of Oregon's share of matching funds for the South/North LRT project is proposed to be one-sixth of total construction costs which is estimated to be \$475 million.
- Two alternatives have been identified for financing the State's contribution:

[a] An up-front cash payment and a bond approved by the legislature in 1995 to be funded by a 30-year commitment of lottery funds which would begin in FY 1997. The bond would also be backed by a "moral obligation" of the State to appropriate other State funds to repay the debt if lottery revenues are insufficient to meet debt service requirements. The "moral obligation" commitment is needed to allow for a long-term (20 - 30 year term) lottery bond. Without such a commitment, the maximum term of a bond backed only by lottery funds might be 15 years.

For example, if the legislature committed a total of \$40 million per year of lottery funds to LRT match (this total would be used for both the existing Westside LRT commitment and the proposed South/North LRT), then about \$30 million per year would be available to the South/North LRT project until FY 2009 and \$40 million per year would be available for the South/North LRT project thereafter. This stream of funds would support a \$95 million up-front cash payment and a \$380 million lottery bond for the South/North LRT project.

[b] Same as option [a] except that the legislative commitment of lottery funds would be supplemented by an OTC commitment of an agreed-upon amount of STP (or NHS) funds to be used either as a cash contribution during the construction period of the project and/or for debt service over the term (or a portion of the term) of the bond. The OTC commitment of STP funds would reduce the annual draw on lottery funds.

For example, if the OTC committed \$15 million per year of STP funds to the South/North LRT Project over its eight year construction period, the amount of funds needed from the lottery bond (in the example shown in [a], above) could be reduced to \$260 million. This would lower the South/North LRT Project's annual demand for lottery funds by about \$10 million per year over the term of the bond.

- Tri-Met would enter into an agreement with ODOT which commits the state's matching funds during 1995/96 in order to demonstrate a fully-committed 50% share of non-Section 3 funds prior to the mark-up of the next federal authorization bill.
- In addition to the state matching funds, the State may be asked to provide credit enhancements (the amount and source to be determined) to support interim borrowing requirements caused by the cash-flow limitations of federal funds.
- The following oversight functions would be established for State:
 - [a] A Bi-State Compact may be proposed to the legislature to oversee the South/North LRT project. If a Bi-State Compact is proposed, it will provide for a member of the OTC to sit on the governing board; and
 - [b] The criteria currently required by state statute for the ODOT Director's release of State matching funds for the Westside LRT project will be required for the release of the State's contribution to the South/North LRT project;
 - [c] A Steering Group and Project Management Group will be established, similar in scope and function to those in operation on the Westside Project, which will provide ODOT on-going involvement in key project management decisions.
- A task force would be formed to determine if there are other funding sources that can be used for South/North LRT Project which reduce the funding requirements of the State and regional property-owners.

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I. OVERVIEW OF FINANCING PLAN

1.1 Background

In reviewing the proposed financing plan, it is important to consider the unique facets of securing federal funding for LRT projects. The fact that Section 3 New Start funds, the source of federal funding for LRT, are discretionary funds alters the character of the financing plan, the timing of securing funding commitments and the strategy for implementing the financing plan.

In particular, as evidenced by ISTEA, to receive Section 3 funding for an LRT project, it is necessary to have the Section 3 funds earmarked in the transportation authorization bill. If a project is not earmarked in the upcoming authorization bill, it will almost certainly have to wait another five or six years (until the next authorization bill) for another opportunity for federal funding.

Beyond sheer political muscle, it will be necessary to demonstrate the local financial commitment to get a project earmarked in the upcoming authorization bill. The existence of local funding commitment was a major consideration in the earmarking within ISTEA, but some projects without local commitments got earmarked. Since that time, most of the earmarked projects which did not have a local funding commitment have faltered. Congress has vented its frustration about tying up federal funds on projects which do not proceed and, as a result, has intensified its requirement that local funding be committed as a pre-condition for future earmarkings.

The current ISTEA terminates on September 30, 1997. However, ODOT and Tri-Met have learned from their federal representatives that the Administration intends on marking-up an authorization bill during calendar 1995 and reporting the bill to Congress in early 1996 for adoption during September 1996. Thus, it is necessary to establish state and local funding commitments in 1995 and seek an earmarking for federal funds in 1996 or delay project funding until the year 2001 or 2002. It is important to note that at this time we need a "commitment" of funds, not "the money in-hand".

There are several worrisome but unavoidable uncertainties which result from these circumstances including:

- [a] State and local funding commitments must be made before the project is fully defined and highly reliable cost estimates, based on detailed engineering, exist;
- [b] State and local funding commitments must be made based on assumptions about what might be included in the mark-up of the federal transportation authorization bill and how congressional deliberations might proceed;
- [c] Beyond the authorization bill, the financing plan must also be based on assumptions about future levels of federal transportation appropriations which in turn have a significant impact on the size and nature of the financing plan.

These uncertainties will lead to questions about the financing plan which do not always have definitive answers. Accordingly, the financing plan must be evaluated on its ability to accommodate a variety of circumstances and not on its ability to render static answers to unanswerable questions.

As part of this background, it is also important to introduce the concept of the "Full Funding Grant Agreement (FFGA)" which Tri-Met must enter into with the FTA to receive the federal funds. It is important to note that FTA will only execute FFGAs which fully fund an operable segment of a project. That is, the combination of federal, state and locally committed funds must be sufficient to build an entirely operational line.

If, for example, federal funds are not earmarked in the authorization bill, then FTA will not execute an FFGA which requires the use of federal funds to construct an operational line. If, however, the authorization bill includes an earmarking which is insufficient to fund a full-length project but is sufficient, when added to the committed state and local funding, to build a shorter (but fully operational) line, FTA will execute an FFGA for the shorter line (Minimum Operable Segment (MOS)). The notion of an MOS is important to the financing plan which is proposed later in this report.

1.2 Capital Costs

The total capital cost for the South/North LRT project between Clackamas Town Center and 99th Street in Clark County is estimated to be \$2.85 billion in year-of-expenditure dollars. Year-of-expenditure dollars were calculated from a 1994-dollar capital cost estimate using a construction scheduling computer model developed for the Westside LRT project. The preliminary schedule assumes a full funding contract with the Federal Transit Administration would be executed in early 1998, a least-time construction schedule would be followed and construction would be completed in 2007.

It must be noted that the capital cost estimates are based on a pre-Preliminary Engineering level-of-detail. Furthermore, there are a variety of design options in many segments which could effect the construction cost. These uncertainties are addressed in the year-of-expenditure estimate by the inclusion of a 35% contingency on engineering estimates. In sum, by accepting the \$2.85 billion construction cost estimate as a basis for making funding requests, the project has, in essence, assumed a maximum budget for capital construction. From this point on, project decisions on design elements and schedule will be made so as to ensure they fit within the maximum budget.

In Section 1.1, the concept of Minimum Operable Segments (MOS) was introduced. It should be noted that the MOS for the South/North LRT project would be an LRT line between downtown Vancouver and downtown Milwaukie. While such a line would not fully address the objectives of the project, it would be a workable line with sizeable benefits. The estimated YOE cost for the Milwaukie CBD-to-Vancouver CBD MOS is \$2.10 billion. The relevancy of the MOS and its associated cost will be made apparent below.

1.3 Availability of Federal Funds

1.3.1 Federal Authorization Options

The financing plan for the South/North LRT project is premised on a Section 3 share of 50%, or \$1.425 billion. The reader should note that this is the "Section 3 share" not the "Federal share" which would include any formula flexible funds (STP or NHS) that may be employed in the funding plan. It should be noted that the Portland region already has a need for about a \$100 million earmarking in the upcoming authorization bill for the Westside (system-related costs)/ Hillsboro project. Thus, the total Section 3 authorization request would be about \$1.525 billion.

It is important to consider the three types of authorization that may be available in the next authorization bill: "*outright authorization*", "*contingent commitment*" and a "*program of interrelated projects*". Regardless of which type of authorization is ultimately achieved, it will be necessary to demonstrate that there is a sufficient commitment of local and state funds to match the construction of the entire project.

"Outright authorization" implies that the funds allocated the project are legally available to the project over the life of the authorization bill although their actual receipt depends on future decisions by the appropriation committees. While an "outright authorization" is a necessary condition to be able to borrow to meet project cash-flow requirements, it is not sufficient to meet the project's borrowing needs. This is due to the fact that debt markets deeply discount the "outright authorization" when funds are borrowed against it.

A "contingent commitment", on the other hand, represents a commitment of funds subject to a future authorization bill. Thus, while funds are legally obligated to a project, funds are not to be appropriated towards such commitments in the current authorization period. This is a new authority permitted by ISTEA which has not yet been applied in practice, but will be soon be applied to the Hillsboro Extension. In the borrowing program for the Westside LRT, the debt markets gave borrowing credit for the anticipated Hillsboro "contingent commitment" through a formula similar to that used for borrowing against an "outright authorization", but only after an FFGA is signed which includes the "contingent commitment". Until such an FFGA is signed, no borrowing credit is given for the "contingent commitment".

The "program of interrelated projects" differs from the first two options in that it does not afford a legal funding commitment to a portion of the project, instead it establishes a policy regarding a future extension(s). The Westside/Hillsboro LRT project is an example of a "program of interrelated projects" in ISTEA. ISTEA gave an "outright commitment" of funds to the Westside LRT to SW 185th Street. In addition, ISTEA expressed an intent or, at least, an acknowledgement that the Hillsboro Extension would be included in a future amendment to FFGA for the Westside LRT project. While this level of commitment is clearly inferior to the first two, it provides a political basis to bridge authorization bills when a legal commitment was not achievable.

1.3.2 Assessment of Federal Authorization Options

Outright Authorization: Based on previous experience and assuming historic levels of national Section 3 authorization, the total Westside/Hillsboro and South/North request of \$1.525 billion is beyond that which can reasonably be expected as an "outright authorization". Thus, a financing plan premised on a fully outright authorized project is not judged to be viable and will not be further considered in this report.

Partial Outright Authorization/Partial Contingent Commitment: As stated earlier, it is possible to get an FFGA for a shorter but operational line (an MOS) with the opportunity to effectuate a contingent clause when additional funding is made available to the project. The best way to implement such a strategy is to secure an "outright authorization" for the MOS and a "contingent commitment" for the extension.

In the case of the South/North LRT project, this would require a \$1.15 billion "outright authorization" of Section 3 funds (this includes \$1.05 billion for the South/North MOS and \$100 million to close-out the Westside/Hillsboro project) and a \$375 million "contingent commitment" for the extension of the MOS to 99th Street in Clark County and to the Town Center area in Clackamas County would be earmarked in the upcoming authorization bill.

The \$1.15 billion Section 3 authorization is probably too large of an "outright authorization" request, so a back-up variation has been identified. Since the MOS is estimated to cost \$2.1 billion and the proposed local and state match for the full project is \$1.425 billion, only \$675 million needs to be "outright authorized" in order to demonstrate sufficient funding commitments to construct the MOS. The overmatch (the amount of state and local funds in excess of 50% of the MOS cost) can be used to construct the MOS and then match the "contingent commitment" when these funds are effectuated. Thus, under the variation, a \$775 million "outright authorization" of Section 3 funds (\$675 million for the South/North LRT MOS and \$100 million for Westside/Hillsboro LRT) and a \$750 million "contingent commitment" (for extensions to the South/North LRT MOS) would be earmarked in the upcoming authorization bill.

Partial Outright Authorization/Partial Program of Interrelated Projects: The required dollars would be similar to the above option and variation except that a "contingent commitment" would not be included in the earmarking. Instead some statement of intent, whether as a "program of interrelated projects" as in ISTEA or some similar bill or report language, would be included. While not as powerful as a "contingent commitment", this option is more easily achievable and could provide the basis for a later "contingent commitment" enacted by the Administration.

1.4 Allocation of Non-Section 3 Shares Between the States of Oregon and Washington

Metro, C-Tran and Tri-Met have been working to determine an equitable formula for allocating the local share of the capital costs (\$1.425 Billion). Two methods for computing the relative shares of the capital cost were identified: *Ridership* and *Population*.

The "Ridership" methodology assumes that the capital cost of the project should be allocated on the basis of the relative number of South/North LRT trips that have a production and/or attraction in Oregon versus Washington. This is shown below:

	Daily Trips	Per Cent
Number of South/North LRT Trips with a Washington Production and/or Attraction	23,435	31.2%
Number of South/North LRT Trips with an Oregon Production and/or Attraction	51,720	68.8%

The "Population" methodology assumes that the relative populations within the corridor served by LRT correlates well with ridership and benefit and is simpler to understand than "productions and attractions". There are two possible years to use as the basis for determining C-TRAN's share of the South/North :

- 1994: Because it is the current year and the year agreement is reached.
- 1998: Because it is the year that the FFGA is projected to be executed and construction becomes real (and starts).

Based on these years, C-TRAN's share of South/North would be as follows:

Base Year to Pro-Rate Share	S/N Corridor Population	Population in Clark Co.	% in Clark County	% in Oregon
1994	552,422	184,525	33.4%	66.6%
1998	578,509	198,829	34.4%	65.6%

Upon consideration of all of these possibilities, it was recommended that the C-Tran/Washington share of the non-Section 3 capital requirements should be one-third or \$475 million. As a result, the Tri-Met/Oregon share should be two-thirds or \$950 million.

1.5 Allocation of Tri-Met/Oregon Share Between the State of Oregon and Tri-Met

In total, it is proposed that Tri-Met and the State of Oregon contribute two-thirds of the non-Section 3 funds needed to construct the project. This is estimated to amount to \$950 million. It is further proposed that this total be split evenly between Tri-Met and the State. As a result, the State is requested to contribute one-sixth of the project cost, or \$475 million based on current estimates. The 50/50 split between Tri-Met and the State is the same relationship that was agreed-upon for funding the Westside/Hillsboro LRT project. The rationale for the State's participation includes:

- [a] *Oregon Income Tax Derived from Construction of the Project:* About \$160 million.
- [b] *Oregon Income Tax Derived from Operation of the Project:* About \$50 million by 2015.

- [c] *Reduced Unemployment and Other Welfare Requirements on the State:* Creates on average about 3000 jobs per year over a 20-year time horizon.
- [d] *Compliance with State Requirements Regarding Urban Sprawl and VMT:* Creates the ability to encourage a compact Portland region with transit-supportive land uses within the urban area and, as a result, achieve a 20% reduction in per capita VMT as required by the State's Transportation Planning Rule.
- [e] *State Implementation Plan Benefits:* A major component of the SIP is a major transit expansion. Maintenance of air quality standards allows for reduced federal regulations on future development, saving business over \$2 million per year.
- [f] *Achievement of Region 2040 Plan Objectives and a Reduced Cost of Urban Sprawl:* The Region 2040 Plan establishes a long-term policy on urban containment and transit-supportive land uses within the urban area. These policies result in massive savings in infrastructure costs, including arterials and collectors. This Plan and its related fiscal benefits would not be feasible without a light rail system.

II. RECOMMENDED FINANCING PLAN

2.1. Implementation Framework

The financing plan is premised on executing a Full Funding Grant Agreement which allows for the staged implementation of the South/North LRT project between the Clackamas Town Center and 99th Street in Clark County. Stage 1, which would start soon after the federal authorization bill passes, would construct an MOS between the Milwaukie CBD and the Vancouver CBD. Stage 2 would construct the extensions from the MOS to the desired termini. Stage 2 would hopefully overlap the latter part of Stage 1 but, depending on events, might be sequential to Stage 1.

To allow for the fastest practical construction schedule, the financing plan would "advance spend" local and state funds (under a Letter of No Prejudice which would ensure such funds would later count as local match) and short-term borrow to fill federal cash-flow gaps.

2.2 Federal Funding Participation

2.2.1 Federal Authorization Strategy

Over the next two authorization bills, Tri-Met will seek a 50% federal share for the South/North LRT project. Based on current estimates, this will amount to \$1.425 billion. To secure the commitment for such funds, Tri-Met would implement a federal authorization strategy consisting, in priority order, of the following request and back-ups:

First Request: Earmark both a \$1.15 billion "outright authorization" of Section 3 funds (\$1.05 billion for the South/North MOS and \$100 million for the Westside/Hillsboro project) and

a \$375 million "contingent commitment for the extension of the MOS to 99th Street in Clark County and to the Town Center area in Clackamas County in the upcoming authorization bill. It should be understood that this request for authorization is extremely large and not likely to be achievable. However, it provides Tri-Met with the ability to compromise, as part of the congressional deliberations, to *Back-Up 1* which is likely the best achievable option.

If First Request Fails, Back-Up 1: Earmark both a \$775 million "outright authorization" of Section 3 funds (\$675 million for the South/North LRT MOS and \$100 million for Westside/Hillsboro LRT) and a \$750 million "contingent commitment" (for extensions to the South/North LRT MOS) in the upcoming authorization bill. It is anticipated that the "contingent commitment" would automatically become an "outright authorization" upon enactment of the authorization bill following the one to be adopted in 1996 (or 1997).

If Back-Up 1 Fails, Back-Up 2: Earmark an "outright authorization" of \$775 million of Section 3 funds for the MOS and a "program of interrelated projects-type" commitment for the extensions. Tri-Met would then have to seek an "outright authorization" of \$750 million of Section 3 funds (or more if the construction schedule has to be elongated) in the federal authorization bill following the one to be adopted in 1996 (or 1997).

2.2.2 Federal Appropriations Considerations

While the federal authorization level defines the ultimate level of federal financial involvement, the actual amount of funds available to the project at any point at time is a function of the appropriations process. Because (i) the amount of funds earmarked to different projects may exceed the total amount of funds authorized and (ii) congress has regularly chosen not to appropriate the full amount of funds authorized, it is virtually certain that the funds appropriated to the project will not (i) meet the cash flow needs of the project and, (ii) over the period covered by the authorization bill, will not total the amount authorized for the period. Thus:

- [a] There will be a need for interim financing, and
- [b] The receipt of Federal funding for the project will likely bridge three authorization bills.

The base analysis shown later in this report assumes that federal funds would be appropriated to the project at a uniform rate of \$100 million per year. A sensitivity analysis, also shown later, shows the impact of lower federal appropriations.

2.3 C-Tran/State of Washington Funding Participation

As explained in Section 1.4, it is proposed that, in total, C-Tran and the State of Washington contribute one-sixth of the total capital cost for the project. This is estimated to be \$475 million. C-Tran will likely propose to the State of Washington that they evenly split this funding requirement.

C-Tran's \$237.5 million funding contribution would come from bonds backed by a 0.3% sales tax and a 0.3% motor vehicle excise tax imposed within Clark County. C-Tran is about to schedule an election for February or March 1995 to seek voter approval of these taxes. This analysis assumes that the bonds would be issued in their entirety at the beginning of the construction period.

Current thinking regarding the State of Washington's \$237.5 million contribution is that it would be provided in installments over the construction period (the base analysis assumes these installments would be equal). There are two possible sources of funding for the Washington State share. WSDOT is likely to propose a 5% oil importation tax the proceeds of which would be allocated to the development of HCT projects. If such a tax were not enacted, the likely source of funding would come from the motor vehicle excise tax already imposed by the State.

2.4 Tri-Met Funding Participation

It is proposed that Tri-Met would contribute one-sixth of the total project capital cost. Tri-Met's share would be paid from the \$475 million bond measure recently approved by 65% of the region's voters. This analysis assumes that these bonds would be issued in their entirety at the beginning of the construction period.

2.5 State of Oregon Funding Participation

It is proposed that the State of Oregon would contribute one-sixth of the total project cost or, based on current estimates, \$475 million. Two alternatives have been identified for financing the State's contribution:

Option A: An up-front cash payment and a bond approved by the legislature in 1995 to be funded by a 30-year commitment of lottery funds which would begin in FY 1997. The bond would also be backed by a "moral obligation" of the State to appropriate other State funds to repay the debt if lottery revenues are insufficient to meet debt service requirements. The "moral obligation" commitment is needed to allow for a long-term (20 - 30 year term) lottery bond. Without such a commitment, the maximum term of a bond backed only by lottery funds might be 15 years.

For example, if the legislature committed a total of \$40 million per year of lottery funds to LRT match (this total would be used for both the existing Westside LRT commitment and the proposed South/North LRT), then about \$30 million per year would be available to the South/North LRT project until FY 2009 and \$40 million per year would be available for the South/North LRT project thereafter. This stream of funds would support a \$95 million up-front cash payment and a \$380 million lottery bond for the South/North LRT project.

Option B: Same as option [a] except that the legislative commitment of lottery funds

would be supplemented by an OTC commitment of an agreed-upon amount of STP (or NHS) funds to be used either as a cash contribution during the construction period of the project and/or for debt service over the term (or a portion of the term) of the bond. The OTC commitment of STP funds would reduce the annual draw on lottery funds.

For example, if the OTC committed \$15 million per year of STP funds to the South/North LRT Project over its eight year construction period, the amount of funds needed from the lottery bond (in the example shown in [a], above) could be reduced to \$260 million. This would lower the South/North LRT Project's annual demand for lottery funds by about \$10 million per year over the term of the bond.

Thus the analyses shown in this report assume that State funds would be derived from one or two sources: Lottery funds and flexible transportation funds (STP/NHS). These sources are discussed below.

2.5.1 Lottery

The financing alternatives identified for the State's contribution require lottery appropriations of about \$20 - \$40 million per year (depending on the alternative and the year) over a 30 year period. Option A assumes that only lottery funds will be used to fund the State's contribution to the project. While Option B assumes that STP (or NHS) funds would be used to reduce the lottery requirement (either through a cash contribution and/or partial repayment of debt), lottery proceeds would still be used to fund an up-front cash payment and repay a bond.

Bond underwriters view lottery bonds as risky securities, thus they have been reluctant to issue bonds solely backed by lottery proceeds which are longer than 15 years. It should be noted that bond underwriters view the pledge of STP (or NHS) funds towards the repayment of debt as even more risky, to the point where STP funds likely can not, in themselves, support debt.

Accordingly, the proposed financing alternatives couple (or "wrap") the lottery commitment with a "moral obligation" commitment of the State to appropriate other funds to repay debt if lottery proceeds prove to be insufficient. Such bonds would be similar to so-called "double barrel" bonds in that the basic credit obligation upon which the bondholders would rely would be the State's "moral obligation" to cover shortfalls, but annual debt service would be paid out of lottery funds (or, in Option B, possibly with lottery and STP funds). With a "moral obligation" commitment, the duration of a lottery bond can be extended from a likely 15-year maximum to 20, 25 or 30 years and, as a result, keep annual lottery requirements at more acceptable levels.

It should be noted that this approach assumes that the lottery funds allocated to the South/North LRT project would be given the same priority as those allocated to the Westside LRT project. That is, the South/North LRT would have "first call" on annual

lottery proceeds (e.g., the allocation of lottery funds to the South/North LRT project would come before almost all other project allocations), eliminating the need to use some of the funds allocated to the South/North LRT project as "coverage" and, thereby, decreasing their leverage.

It also should be noted that if STP (or NHS) funds are to be used to repay the bonds (which is one of the possibilities under Option B), the amount of lottery funds pledged to repay the debt should still, in itself, be sufficient to repay the debt. While this level of lottery funds would be pledged, the actual funds used to repay the debt could come from STP or any other source or combination of sources of State funds. The reason for making such a pledge of lottery funds is to maximize the marketability (and thereby reduce the interest costs) of the bonds.

2.5.2 Flexible [STP] Funds

It is proposed in Option B that a portion of the State's share be paid through OTC-controlled flexible federal funds (STP and/or NHS). In preliminary technical meetings with ODOT staff, ODOT has suggested that, to maintain regional equity within the State, the allocation of OTC-controlled STP funds to the South/North LRT project would have to come from the "normal" allocation of State funds to Region 1.

While there is not a definitive formula, ODOT projects that, without any increases in State or Federal transportation dollars, the urban portion of Region 1 would receive an average of \$50 million per year from the State. Given the fact that the State's priority is for maintenance and rehabilitation and that, according to ODOT, such costs average \$20 million per year in Region 1, approximately \$30 million per year is available within the urban portion of Region 1 for "modernization" projects (again, this assumes no new funds over the life of the South/North project).

In addition, as a result of the recent STIP amendment which downsized the State road program, ODOT already has commitments in Region 1 for delayed road projects which total approximately \$45 million. If we assume that these projects would be funded in the first two years of the next STIP (e.g., 1999 and 2000), the result is that ODOT could theoretically commit up to \$15 million of STP funds to the South/North LRT project in the year 2000 and up to \$30 million per year thereafter and have the funds come from those amounts which the OTC would normally make available to Region 1 for modernization projects.

Option B assumes a \$15 million per year commitment of STP funds over the eight-year construction period of the project. As a result, the STP funds would fund \$120 million of the State's contribution on a cash basis. The availability of such funds will be subject to federal authorizations and appropriations but not subject to OTC-proposed "balancing" formulae regarding how to meet obligational authority or other similar limitations.

As an alternative, Option B could assume that the OTC would make a longer term commitment of STP funds to be coupled with lottery funds to repay the bond. Again, this is made possible (assuming the OTC can make such a long-term commitment and that

federal law continues to allow STP funds to be used to repay debt) by the "moral obligation" commitment to repay the bonds. As stated above, this approach would also require "pledging" a sufficient amount of lottery funds to cover debt service, even though a portion of the debt service would be paid with STP funds.

2.5.3 Method and Timing of the State Commitment

In order to maximize the likelihood of receiving an earmarking for the project in the upcoming federal authorization bill, a commitment of the State's entire share will have to be in place by the end of 1995 or very early in 1996. To accomplish this, several things will have to occur:

- [a] The legislature will need to adopt a bill during the 1995 session which establishes an on-going allocation of lottery proceeds for the South/North project and authorization to bond such funds. There does not have to be an appropriation of lottery funds to the project during the FY 1996/97 biennium; and
- [b] The OTC will need to take an appropriate action to commit to the on-going allocation of STP funds to the project. Since these funds would not be part of the current STIP, in fact they would bridge several STIPs, the precise nature of the OTC action and the public and administrative process for taking the action need to be determined; and
- [c] The OTC and Tri-Met will need to enter into an intergovernmental agreement which commits the bond proceeds and on-going STP allocation to the project, subject to a federal funding commitment and the due diligence criteria already established by statute for the ODOT Director.

2.6 Interim Borrowing Needs

As explained in Section 2.2.2, regardless of the type and level of federal authorization, the amount of federal appropriations will not keep pace with cash-flow needs of the project. As a result, interim borrowing will be required. Since the interim financing requirement is expected to be larger than Tri-Met's credit capacity, State credit support will likely be necessary. It should be noted that the interest on interim borrowing is a "project cost" and, thus, 50% is repaid with Section 3 appropriations.

Interim borrowing needs will be met, in part, by "advancing" local, state and federal formula funds. In this context, "advancing" means overmatching Section 3 in the early years of the project followed by an equivalent amount of undermatching in the latter years. In addition, the interim borrowing program will have to be supplemented with lines of credit or other short-term debt instruments (such as commercial paper).

The debt service on credit lines and other debt instruments would be repaid by future Section 3 appropriations. However, a credit enhancement, which is a guaranteed source of funds to repay the short-term debt if the federal funds are not appropriated, will be required

by banks, underwriters and the debt market. Neither the project resources nor the general fund resources of Tri-Met and C-TRAN are likely to be adequate by themselves to support the interim borrowing requirements of the project. Thus, credit enhancements will be requested from the States of Oregon and Washington in the form of guarantees backed by either (a) identified dedicated revenue streams or (b) "moral obligation" or other similar commitments which meet the requirements and restrictions of state law and are satisfactory to the debt markets. In addition, it might be prudent to provide Tri-Met with a stand-by taxing authority to be used, if and as necessary, for such purposes.

III. IMPACTS OF FINANCE PLAN OPTIONS ON STATE INTERESTS

3.1 Analysis of Option A Financing Plan

3.1.1 Base Analysis

Table 1 illustrates the Option A financing plan which assumes the state and local shares described in Section II and:

- [a] Construction of the MOS between Milwaukie CBD and Vancouver CBD starts in 1998 and ends in 2005 and the construction of Extensions to the Town Center and 99th Street in Clark County overlaps the construction of the MOS in the years 2004 and 2005. The Extensions are completed in the year 2007.
- [b] Section 3 funds would be appropriated to the project at a 50% rate up to a maximum of \$100 million per year until the year 2008 when the federal appropriation begins to rise to a maximum of \$115 million per year.
- [c] State and local funds are advanced to the project to allow it to maintain its schedule. After these funds are fully expended, interim borrowing is employed to meet cash-flow needs.
- [d] The State's contribution is derived fully from lottery funds. Currently, the State is allocating \$10 million per year of lottery funds to repay the debt on the State's share of the Westside LRT Project. This Option assumes that, beginning in FY 1997, the State would allocate an additional \$30 million per year to the South/North LRT Project. In FY 2009, when the Westside LRT bonds are fully repaid, the allocation to the South/North Project would be increased by the \$10 million per year that formally was allocated to the Westside LRT project. The then \$40 million per year allocation would continue until the South/North LRT bonds were fully repaid in FY 2026.
- [e] Lottery funds allocated to the project would be used in two ways. Funds allocated in FY 1997 through FY 1999 (along with any interest earnings) would be provided to the project on a cash flow basis. The remaining lottery funds would be used to repay debt. The year-by-year use of lottery funds is shown in Table 2.

Table 1a: South/North LRT Construction Costs: Option A
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	Total
Milwaukie-Vancouver	\$ 20	\$ 88	\$260	\$515	\$496	\$315	\$155	\$ 23								\$1,871
CTC/99th Extensions							\$ 77	\$288	\$322	\$159						\$ 846
Interim Financing					\$ 1	\$ 1	\$ 2	\$ 8	\$ 19	\$ 27	\$ 25	\$ 21	\$ 16	\$ 10	\$ 2	\$ 133
Total Cost	\$ 20	\$ 88	\$260	\$515	\$497	\$316	\$234	\$319	\$341	\$187	\$ 25	\$ 21	\$ 16	\$ 10	\$ 2	\$2,850

Table 1b : South/North LRT Financing Plan: Option A
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	ISTEA II ^{\$100m - WS} _{675 - S/N}						ISTEA III ^{-775m - S/N}						ISTEA IV			Total
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	
Section 3 <i>Approx.</i> C-TRAN	\$ 10	\$ 45	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$110	\$115	\$115	\$115	\$115	\$1,425
Washington	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 23	\$ 23	\$ 23						\$ 237
Tri-Met	\$475															\$ 475
Oregon		\$ 95	\$380													\$ 475
Total Revenues	\$747	\$164	\$504	\$124	\$124	\$124	\$124	\$123	\$123	\$123	\$110	\$115	\$115	\$115	\$115	\$2,850

Source: Tri-Met, 1994

bonied
97 \$30m.
98 30 \$3m. interest
99 30

Oregon Department of Transportation
 Light Rail Extension Construction Fund Allocation Analysis
 Cash Flow Summary

Table 2

Fiscal Year Ending	Gross Debt Service		Available Construction Fund Allocations	Construction Fund Deposits	Construction Fund Earnings	Construction Fund Ending Balance	G.O. Bond Proceeds	G.O. Bond	G.O. Bond	G.O. Bond Debt Service
	On Existing Lottery Bonds	Revised Construction Fund Allocations						Proceeds + Const Fund Ending Balance	Project Fund Deposit	
6/30/94	9,999,865	10,000,000	135	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6/30/95	9,997,164	10,000,000	2,836	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6/30/96	9,996,164	10,000,000	3,836	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6/30/97	9,999,164	40,000,000	30,000,836	30,000,836	2,136,810	32,137,646	0.00	0.00	0.00	0.00
6/30/98	9,995,664	40,000,000	30,004,336	30,004,336	4,426,063	66,568,045	0.00	0.00	0.00	0.00
6/30/99	9,995,195	40,000,000	30,004,805	30,004,805	0.00	96,572,850	381,700,000	478,272,850	475,004,250	0.00
6/30/00	9,998,195	40,000,000	30,001,805							29,998,631
6/30/01	9,998,995	40,000,000	30,001,005							29,995,288
6/30/02	9,995,855	40,000,000	30,004,145							29,997,163
6/30/03	9,995,655	40,000,000	30,004,345							29,994,925
6/30/04	9,999,305	40,000,000	30,000,695							29,998,033
6/30/05	9,997,205	40,000,000	30,002,795							29,995,233
6/30/06	9,999,005	40,000,000	30,000,995							29,995,953
6/30/07	9,999,720	40,000,000	30,000,280							29,998,890
6/30/08	9,996,250	40,000,000	30,003,750							29,997,708
6/30/09	3,400,000	40,000,000	36,600,000							36,596,370
6/30/10		40,000,000	40,000,000							39,998,100
6/30/11		40,000,000	40,000,000							39,995,460
6/30/12		40,000,000	40,000,000							39,996,555
6/30/13		40,000,000	40,000,000							39,994,715
6/30/14		40,000,000	40,000,000							39,995,215
6/30/15		40,000,000	40,000,000							39,998,040
6/30/16		40,000,000	40,000,000							39,995,890
6/30/17		40,000,000	40,000,000							39,997,240
6/30/18		40,000,000	40,000,000							39,998,355
6/30/19		40,000,000	40,000,000							39,995,845
6/30/20		40,000,000	40,000,000							39,996,315
6/30/21		40,000,000	40,000,000							39,996,535
6/30/22		40,000,000	40,000,000							39,998,285
6/30/23		40,000,000	40,000,000							39,995,540
6/30/24		40,000,000	40,000,000							39,996,908
6/30/25		40,000,000	40,000,000							11,969,525
6/30/26										
	153,363,400	1,190,000,000	1,036,636,600	90,009,977	6,562,872	96,572,850	381,700,000		475,004,250	918,486,764

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- [f] This scenario also assumes that the lottery commitment would be "wrapped" with a "moral obligation" commitment by the State.

The following fiscal impacts and issues are identified for this scenario:

- [a] In total, about \$95 million would be available to the project in FY 1999 as an up-front cash contribution. In addition, the 30-year maturity allowed by the "moral obligation" commitment and the \$30 - \$40 million per year annual lottery allocation to repay debt allows for a \$380 million contribution in FY 2000.
- [b] Section 3 funds must be appropriated to the project over 15 years and three authorization cycles. Moreover, appropriations must occur for five years after the project is complete in order to repay interim borrowing caused by the inability of federal appropriations to keep pace with the project's cash-flow needs.
- [c] Maximum interim borrowing occurs in the year 2007 at which time approximately \$600 million of short-term debt is incurred. Overall, about \$130 million in interest costs accrue to the project.
- [d] Because only lottery funds are used for the State's contribution in Option A, it does not impact the road modernization program in Region 1.

3.1.2 Impact of Lower Federal Appropriations on Option A (Assuming a Sequential Construction Schedule)

Table 3 illustrates the impacts of a lower level of federal appropriations than that assumed in Section 3.1.1, above. The number of permutations of lower appropriation scenarios is endless. This example shows the impact of a \$10 million per year lower appropriation over a six-year period between the years 2000 and 2005, inclusive. The construction assumption in this scenario is the "sequential" option. That is, the MOS (between Milwaukie CBD and Vancouver CBD) is fully constructed before construction starts on the Extensions (to the Town Center and 99th Street).

This scenario is possible under any of the *Federal Authorization Strategies* discussed in Section 2.2.1, but is particularly likely if *Back-Up Strategy 2* is employed ("contingent commitment" is not available to the project, so a "program of interrelated projects-type of earmark is secured for the Extensions). Under such a scenario, the risk may be judged to be too great to proceed with an overlapping construction schedule.

The following fiscal impacts and issues are identified for this scenario:

- [a] The extension of the construction schedule results in about a \$50 million increase in the overall construction cost. The increase is caused by the fact that the increased inflation costs on the extended construction elements outstrips the savings resulting from reduced interim borrowing needs.

Table 3a: South/North LRT Construction Costs: Option A w/ Sequential/Lower Appropriations
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12/ 13	Total
Milwaukie-Vancouver	\$ 20	\$ 88	\$260	\$515	\$496	\$315	\$155	\$ 13								\$1,861
CTC/99th Extensions									\$ 87	\$324	\$363	\$180				\$ 954
Interim Financing					\$ 1	\$ 1	\$ 3	\$ 2	\$ 1	\$ 2	\$ 13	\$ 22	\$ 19	\$ 14	\$ 7	\$ 86
Total Cost	\$ 20	\$ 88	\$260	\$515	\$497	\$316	\$158	\$ 15	\$ 88	\$326	\$376	\$202	\$ 19	\$ 14	\$ 7	\$2,901

Table 3b: South/North LRT Financing Plan: Option A w/ Sequential/Lower Appropriations
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	ISTEA II						ISTEA III						ISTEA IV			Total
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12/ 13	
Section 3	\$ 10	\$ 45	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$100	\$100	\$110	\$115	\$115	\$115	\$200	\$1,450
C-TRAN	\$242															\$ 242
Washington	\$ 22	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20				\$ 242
Tri-Met	\$484															\$ 484
Oregon		\$ 95	\$388													\$ 483
Total Revenues	\$758	\$160	\$498	\$110	\$110	\$110	\$110	\$110	\$120	\$120	\$130	\$135	\$115	\$115	\$200	\$2,901

Source: Tri-Met, 1994

- [b] As a result of the increased costs, the State's contribution to the project budget is increased by about \$9 million (as is Tri-Met's).
- [c] Maximum interim borrowing occurs in the year 2009 at which time approximately \$485 million of short-term debt is incurred, this is about \$115 million less than for Option A (if the overlapping construction schedule were assumed rather than the sequential schedule, the maximum borrowing requirement could be as high as \$700 million). Overall, about \$90 million in interest costs accrue to the project.
- [d] One result of the lower appropriation level is that about \$85 million more of federal funds would come in the third authorization cycle. Since this cycle is further out and occurs years after the project is complete, the risk of getting these funds may be greater.
- [e] Note that the results reported above represent a modest reduction in appropriation levels. Obviously as lower rates are assumed, the impacts get higher.

3.2 Analysis of the Option B Financing Plan

Option B is the same as Option A except that it includes a multi-year commitment of STP funds to the Project by the OTC. The objective of this Option is to reduce the amount of lottery funds that would be needed by the project yet still maintain a reasonable road modernization program in Region 1.

The nature of the fiscal impacts of Option B depend on the amount and duration of the STP commitment made to the project. As explained earlier, it is possible that STP funds would not be available to the Project until FY 2000. While many permutations are possible, two options are considered in this analysis: (i) a cash commitment during the construction period and (ii) a long term commitment to repay bonds.

The cash commitment example assumes that the OTC would commit \$15 million per year of STP funds to the project between FY 2000 and FY 2007, inclusive. The following fiscal impacts and issues are identified for this scenario (Table 4):

- [a] The amount of the bond to be supported by lottery funds could be reduced from \$380 million to \$260 million. As a result, the draw upon lottery funds would be reduced by about \$10 million per year compared to Option A except between FY 1997 and FY 1999, inclusive, when both Options would have the same requirements (because STP funds are not available during these years).
- [b] Obviously, Option B would require \$15 million per year of STP funds between FY 2000 and FY 2007, whereas Option A would not. Without an increase in State transportation revenues or an increase in federal funds granted to the State, the South/North LRT project will use about one-half of the State "modernization" funds that would be expected in the urban portion of Region 1 between the year 2001 and 2007. Additional road modernization could be funded by either a combination of (i)

Table 4a: South/North LRT Construction Costs: Option B (cash contribution)
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	Total
Milwaukie-Vancouver	\$ 20	\$ 88	\$260	\$515	\$496	\$315	\$155	\$ 15								\$1,863
CTC/99th Extensions							\$ 77	\$288	\$322	\$159						\$ 846
Interim Financing					\$ 1	\$ 1	\$ 2	\$ 16	\$ 19	\$ 27	\$ 25	\$ 21	\$ 16	\$ 10	\$ 2	\$ 141
Total Cost	\$ 20	\$ 88	\$260	\$515	\$497	\$316	\$234	\$319	\$341	\$187	\$ 25	\$ 21	\$ 16	\$ 10	\$ 2	\$2,850

Table 4b : South/North LRT Financing Plan: Option B (cash contribution)
Millions of Dollars (Year-of-Expenditure Dollars)

Federal FY:	ISTEA II						ISTEA III						ISTEA IV			Total
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	
Section 3	\$ 10	\$ 45	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$110	\$115	\$115	\$115	\$115	\$1,425
C-TRAN	\$238															\$ 238
Washington	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 23	\$ 23	\$ 23						\$ 237
Tri-Met	\$475															\$ 475
Oregon		\$ 95	\$275	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15						\$ 475
Total Revenues	\$747	\$164	\$399	\$139	\$139	\$139	\$139	\$138	\$138	\$138	\$110	\$115	\$115	\$115	\$115	\$2,850

Source: Tri-Met, 1994

regional STP funds, (ii) a regional arterial fund and/or (iii) future increases in State transportation revenues.

- [c] Existing commitments to improving the Camelot Interchange, Kruseway II and Highway 26 could be met in 1999 and/or 2000.

Another possibility is to commit, say, \$10 million per year of STP funds for the term of the bond to repay debt. The ability to use the STP funds in this manner is derived from the proposed "moral obligation" commitment that would be established in the legislation and the fact that lottery funds would be pledged to cover the full amount of debt service (even though the STP funds would be used to actually pay a portion of the debt). The feasibility of this option depends on determining a way for the OTC to make a long-term commitment of STP funds for debt service.

The following fiscal impacts and issues are identified for this scenario:

- [a] As in Option A, \$380 million in bonds would be issued and repaid over a 30-year term.
- [b] As in Option A and the first example of Option B, \$30 million per year of lottery funds would be committed to the project in FY 1997 through FY 1999, inclusive. Thereafter, this example would require \$10 million per year less of lottery funds than Option A. Interestingly, it would require about the same amount of lottery funds as the first example of Option B. Thus, the two examples of Option B have about the same impact on the lottery.
- [c] Between FY 2000 and FY 2007, inclusive, this approach would allow \$5 million per year of more road modernization in Region 1 compared to the first example of how Option B can be implemented. However, between FY 2008 and FY 2026, inclusive, this example potentially reduces the Region 1 road modernization program by \$10 million per year compared to the first example.

IV. GOVERNANCE AND MANAGEMENT OF THE PROJECT

4.1 Bi-State Compact

Tri-Met and C-TRAN are in the process of preparing a *Bi-State Compact* for possible submission to the Washington and Oregon legislatures in 1995. The purpose of such a Compact is to establish a cooperative governance and management organization for constructing and operating the South/North LRT system. To accomplish this, three critical steps must be taken:

- [a] Tri-Met and C-TRAN must first reach agreement on the form, structure, scope and powers of the "Authority" to be created and prepare legislation defining these elements;

- [b] Both the Oregon and Washington legislative assemblies would then have to pass the legislation (which must be, for all intents and purposes, identical);
- [c] The legislation approved by both legislatures would then be proposed to the U.S. Congress for enactment.

Once passed by Congress, the Authority would have the powers specified in the legislation.

Based on the current draft of the concept:

- [a] The Authority would oversee the construction and operations of the South/North LRT system;
- [b] It would be governed by a Board of six members consisting of two Tri-Met Board members, two C-TRAN board members, one member of the OTC and one member of the Washington Transportation Commission;
- [c] The Authority would not directly hire staff but would contract with Tri-Met, C-Tran and private contractors for services;
- [d] The Authority would receive and hold funding contributions and would disburse such funds through contracts; and
- [e] The legislation would define a uniform set of legislation in both States which apply to the construction and operation of the project.

The last point is critical. The legislation of both States regarding the funding and construction of the project is vastly different. There is concern that the administration of such a project would be difficult and would lead to higher than expected costs. The implementation of a Bi-State Compact provides a vehicle for reconciling these problems.

Related to the matter of allowing for OTC oversight of their funding of the project, the Bi-State Compact affords the OTC a role in the governance of the project. This will allow for a substantially more direct and active involvement than that which currently exists for the Westside LRT project.

4.2 Current Statutory Pre-Requisites for State Match

The legislation authorizing the state contribution for the Westside LRT project provided the ODOT Director the authority to release funds to the project if and when he/she was satisfied that:

- [a] The local approvals for the project were in place;
- [b] There was sufficient assurances that the other funds needed for the project were in place;

- [c] The project, or the specific phase of the project in question, was certified by JPACT; and
- [d] The capital costs for the elements to be funded by the State were sufficiently known.

Identical criteria will be included in the legislation proposed for the South/North LRT project.

4.3 Steering Group and Project Management Group Role

The Steering Group and Project Management Group to be established for the South/North LRT project will be similar in nature to that currently operating for the Westside LRT project. In particular, ODOT will be invited to actively participate in regularly scheduled meetings for the purpose of making design, budget, scheduling and other project-level decisions.

V. PUBLIC-PRIVATE FINANCING ALTERNATIVES

5.1 Alternative Funding Task Force

A public-private task force would be formed jointly by Tri-Met and ODOT to explore other funding sources than can be used for the South/North LRT Project funding requirements, reducing the requirements on the State and regional taxpayers.

The task force would consist of at least seven members drawn from the Tri-Met Board, the C-TRAN Board, the OTC and private industry. It would be chaired by either a member of the Tri-Met Board or the OTC. It would establish a work program by January 15, 1995, with the help of Tri-Met and ODOT staff, that would analyze all feasible aspects of private sector involvement in funding the Project. The Task Force would complete any recommendations judged to require immediate action by March 15, 1995, in order that such recommendations are in time for consideration by the 1995 sessions of the Oregon and Washington legislatures.

5.2 Allocation of Alternative Funding Resources

The allocation of alternative funding resources should be used whenever possible to offset the burden of the taxpayer's contribution to the Project. This could take the form of:

- [a] A reduction in the amount of the Tri-Met General Obligation Bonds issued, to be paid by regional property taxpayers.
- [b] A reduction in the amount of C-TRAN Revenue Bonds issued, to be paid by Clark County taxpayers.
- [c] A substitution for lottery, General Fund or other funds committed to the Project by

the States of Oregon and Washington.

[d] A substitution for STP funds committed to the Project.

The proportionate distribution of such funds would be decided by the Project Steering Committee, but could be based on the proportion of local match being generated by the potential recipients of these funds and the location (Oregon versus Washington) of the private sector activity which is generating the alternative funding.

I-205 CORRIDOR ACTION PLAN CONCLUSIONS AND RECOMMENDATIONS

I. I-205 Corridor Service Plan and List of Potential Capital Improvements

Service Plan

The attached schematic diagram and tables summarize the proposed service plan for the I-205 Corridor as developed by BRW. Routes are configured to serve major trip generators and transfer points in the corridor in a circumferential travel movement. Service levels were based on TSM networks designed for the South/North Corridor Transit Study Pre-Alternatives Analysis, and were matched to projected 2010 travel demand in the corridor.

The highest service levels are between Gateway and Vancouver Mall, with the majority of that service being provided by C-Tran as connecting bus service to Gateway and serving the Airport. The Airport would be served by nine peak hour trips and six trips per hour off-peak between 2000 and 2010. Service levels between Gateway and Oregon City range between three and eight trips in the peak between 2000 and 2010.

Capital Plan

The following table lays out capital improvements assumed to facilitate bus service in the corridor, along with their capital cost.

Improvement	Priority	Cost	Peak Bus Volumes
Year 2000 Priorities			
18th Avenue Ramps	First	\$42,000	4
Parkrose ramp meter/Q bypass	First	\$42,000	22
Gateway double left turn to Glisan	First	\$2,000	25
Signal Coordination/99th and Glisan	First	\$50,000	25
Division Ramp Signals	First	\$50,000	5
Parkrose Signal Coordination	Second	\$200,000	22
Total		\$386,000	
Year 2010 Priorities			
Vancouver Mall TC Ramp	First	\$2,836,400	29
Division Ramp Stop	First	\$30,000	8
Powell Ramp Stop	First	\$30,000	8
Foster/Woodstock Ramp Stop	First	\$30,000	8
Clackamas TC Ramp Meter/Q Bypass	First	\$42,000	8
18th Av Q Bypass	Secondary	\$42,000	6
Holgate Freeway Stop	Secondary	\$150,000	8
Special Clack TC Roadway	Secondary	\$348,200	8
Total		\$3,508,600	

Improvement	Priority	Cost	Peak Bus Volumes
Post-2010 Improvements			
Lincoln Tunnel	First	\$672,100	8+
Highway 212 Ramp Stop	First	\$30,000	5+
HOV Lanes	Second	\$3,354,000	30+
Busway	Second	\$5,171,500	8+
Parkrose P&R New Road	Third	\$370,000	27+
Total		\$9,597,600	

II. Findings of Conclusions

A. I-205 Improvements

1. Tri-Met does not currently have bus service operating along the I-205 circumferential corridor, nor is any proposed in the next five years. I-205 service was considered in last year's Annual Service Plan and was not implemented because ridership potential and public support were not as great as for other service proposals which had better potential to be more cost effective.
2. Service levels projected to meet demand in the BRW report increase from 20 to 30 buses in the peak between Gateway and Vancouver Mall between 2000 and 2010. Peak bus volumes between Gateway and Oregon City would range from three to eight buses per hour between 2000 and 2010.
3. Of the service proposed for 2000 between Gateway and Vancouver Mall, 18 of 25 peak period trips are for C-Tran buses. In 2010, 25 of 30 buses are C-Tran Buses.
4. In the peak period, C-Tran would provide four peak buses to the Airport, and Tri-Met would provide five for a total of nine peak period buses to the Airport in both 2000 and 2010. In the off-peak, four Tri-Met and two C-Tran buses would provide service each hour to the Airport.
5. Proposed capital improvements in the I-205 Corridor are designed to facilitate increased speed and reliability of operations.
6. The AASHTO "bus uses of highways" standard (see attached table) for bus priority treatments recommends capital improvements to improve operations based on certain peak and daily bus volumes. Based on the BRW projections for Tri-Met and C-Tran service, any level of improvement would not likely be needed until at least the year 2000 between Gateway and Vancouver Mall and 2010 south of Gateway.

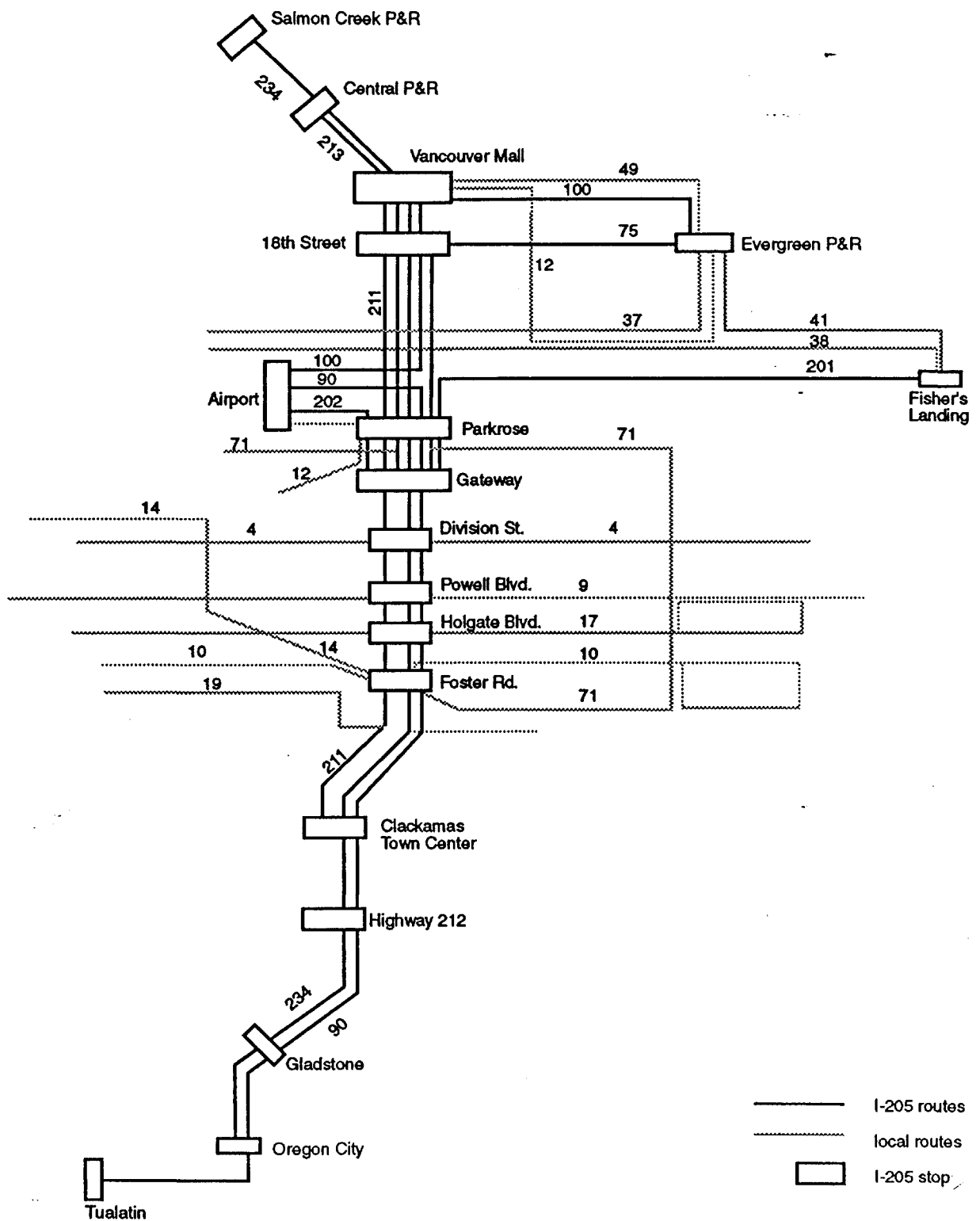
7. The Port of Portland has requested a service planning analysis of transit service to the airport, to be performed either in-house at the Port or Tri-Met or by an independent consultant, if this is an eligible use of the e(4) funding.

B. I-205 Context in South/North Project

1. South/North LRT is the region's number one transit funding priority after the Westside and Hillsboro project are fully funded.
2. Swift completion of the PE concurrently with the DEIS and FEIS is required to meet the aggressive schedule for FTA funding mandated by the ISTEA reauthorization in late 1996. Voter approval of \$475 million in G.O. Bonds for Oregon local share heightens this sense of urgency.
3. The I-205 E(4) interstate transfer funds can be transferred to South/North to fund PE and other pre-construction work for the project.

III. Recommendations

1. The possibility of future service levels of up to 30 peak hour buses along a small part of the I-205 corridor does not warrant withholding any funding from the E(4) account at this time based on this level of analysis. At such time that I-205 capital improvements are required, Tri-Met and C-Tran will prioritize them along with all other requests for capital and service improvements and fund them if money is available and if they prove to be a cost effective investment for the two Districts.
2. The transfer of the E(4) funds to the South/North project should be made at this time. These funds are a critical revenue source for South/North LRT project pre-construction activities, and provide a readily available funding source, against which FTA could issue a Letter of No Prejudice.
3. A reserve of up to \$300,000 should be held back from the e(4) transfer to facilitate a transit service planning study of airport ground access. This study would be led by the Port of Portland with oversight by Tri-Met, Metro and C-Tran.



**Table 3.1
Peak/Off-Peak Headways and Volumes**

Route		Peak/Off-Peak Headways (In Minutes)				
		1993	1995	2000	2005	2010
75X	Evergreen Express	10/60	10/60	10/60	10/60	10/60
76L	Vancouver Mall Limited	30/ -	30/ -			
90O	Oregon City - Airport			20/30	20/30	
90T	Tualatin - Airport					20/30
201X	Fisher's Landing - Gateway			10/ -	10/ -	10/ -
211X	Vancouver Mall - Clackamas TC			30/60	30/60	20/30
213X	Central County - Gateway			15/ -	15/ -	15/ -
234X	Salmon Creek - Gateway				30/60	
234X	Salmon Creek - Oregon City					30/60
202	Airport - Gateway Shuttle		30/30	30/30	30/30	30/30
100L	Evergreen to Airport				15/30	15/50

Route		Peak/Off-Peak Volumes (Per Hour)				
		1993	1995	2000	2005	2010
75X	Evergreen Express	6/1	6/1	6/1	6/1	6/1
76L	Vancouver Mall Limited	2/ -	2/ -			
90O	Oregon City - Airport			3/2	3/2	
90T	Tualatin - Airport					3/2
201X	Fisher's Landing - Gateway			6/ -	6/ -	6/ -
211X	Vancouver Mall - Clackamas TC			2/1	2/1	3/2
213X	Central County - Gateway			4/ -	4/ -	4/ -
234X	Salmon Creek - Gateway				2/1	
234x	Salmon Creek-Oregon City					2/1
202	Airport to Gateway		2/2	2/2	2/2	2/2
100L	Evergreen to Airport				4/2	4/2

Year

I-205	1993	1995	2000	2005	2010
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Salmon Creek					
Central					2
Van Mall			4	4	6
Airport Way	2	2	20	24	29
Parkrose	2	4	22	22	27
Gateway	8	10	25	25	30
Division St.			5	5	8
Powell Blvd.			5	5	8
Holgate Blvd.			5	5	8
CTC			3	3	5
Hwy 212			3	3	5
Gladstone			3	3	5
Oregon City			3	3	5
Tualatin					3

TABLE 43
SUMMARY OF WARRANTS FOR ARTERIAL-RELATED BUS PRIORITY TREATMENTS

TYPE OF TREATMENT	PLAN- NING PERIOD (YR)	MINI- MUM DAILY BUS VOLUME	RANGE IN ONE-WAY PEAK-HOUR VOL.		STREET CHARACTERISTICS	RELATED FACTORS
			BUS	PASS.		
Bus streets	5-10	200	20-30	800-1,200		Commercial frontage. Part of CBD plan. Available alternative traffic routes.
CBD curb bus lanes, main street	1-5	200	20-30	800-1,200		Commercial frontage.
Curb bus lanes	1-5	300	30-40	1,200-1,600	At least 2 lanes available for other traffic in same direction.	
Median bus lanes	1-5	600	60-90	2,400-3,600	At least 2 lanes available for other traffic in same direction. Ability to separate vehicular turn conflicts from buses.	
Contra-flow bus lanes, short segments	1-5	200	20-30	800-1,200		Essential part of bus routing pattern necessary to serve generators or reduce bus miles.
Contra-flow bus lanes, extended	1-5	400	40-60	1,600-2,400	At least 2 lanes available for other traffic in opposite direction. Signal spacing greater than 500-ft intervals.	Ability to provide service.
Bus preemption of traf- fic signals	1-5	100	10-15	400-600	Where not constrained by pedestrian clearance or signal network requirements.	
Special bus signal and bus-actuated signal phases	1-5	50	5-10	200-400	Bus lanes at access points to busways or terminals; or where special bus turning movements must be accommodated.	
Special bus turn provi- sions	1-5	50	5-10	200-400	Wherever vehicular turn provisions are located along bus routes.	
Bus turnouts	1-5	100	10-15	400-600	Points of major passenger loadings on streets with more than 500 peak-hour autos using curb lanes.	
Bus shelters	1-5	—	—	—		100 or more boarding and/or transferring passengers per day and/or daily person waiting time is at least 1,000 min.

lane legislation will also have important bearing on implementation feasibility. Full official and public support is essential. For these reasons, the suggested warrants must be construed as broad-gauged guides in developing specific urban needs.

BUS STREETS AND AUTO-FREE ZONES

Bus streets represent a major commitment to downtown transit and development. They fully separate bus and car traffic, increase bus service reliability, enhance bus identity, and provide downtown distribution for regional express

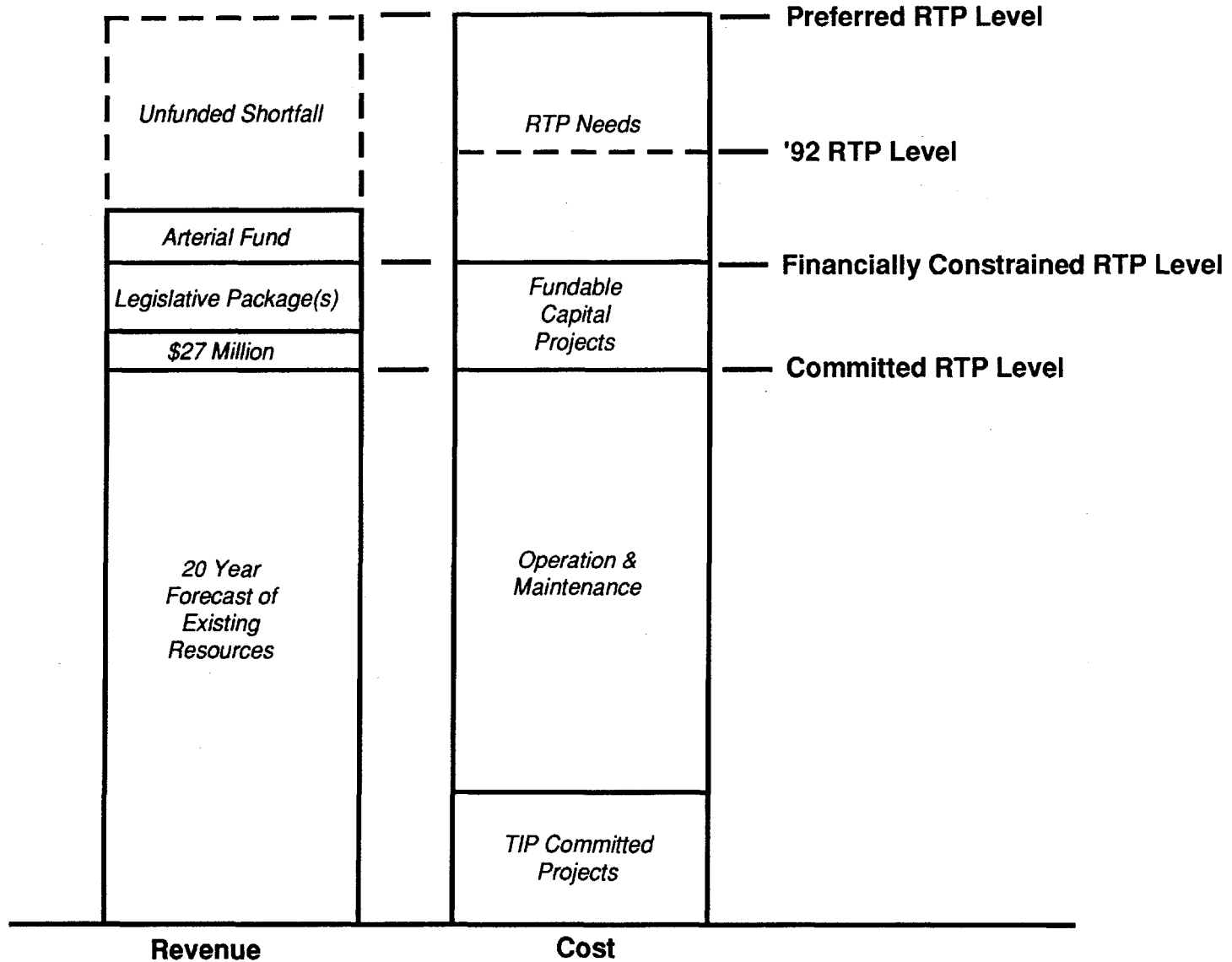
routes. They enhance pedestrian access, and, when accompanied by amenities, can improve the downtown environment.

In the United States—and to some extent in Europe—bus streets and auto-free zones are motivated by environmental planning considerations rather than by bus flow requirements alone. The two best-known American examples are Nicollet Mall in downtown Minneapolis, and the 63rd and Halsted bus streets in Englewood (Chicago). Additional CBD bus streets have been proposed for Atlanta, Dallas, Hartford, St. Louis, and Vancouver. Short sections



METRO

RTP Financial Constraints



COMMITTEE MEETING TITLE SPACT

DATE 1/12/95 7:15 a.m.

NAME

AFFILIATION

NAME	AFFILIATION
✓ Susan McJain	Metro Council
✓ DAVE STURDEVANT	CLARK County
✓ TANYA COLLIER	MULTNOMAH COUNTYS
✓ David Lehman	Port of Portland
✓ GREG GREEN	DEQ
✓ P. E. Fallack	VANCOUVER
✓ Roy ROGERS	WASHINGTON County
✓ Jerry Smith	WSDOT
✓ LACE WARNER	ODOT
✓ Claudette LaVert	Cities of Mult. Counties
✓ Don MORISSETTS	METRO COUNCIL
✓ Don Joe Joe	Clackamas County
✓ Andy Cotnam	metro
✓ Rod Morrow	Metro Council
✓ Tom Walsh	Tri-Met
✓ Craig	Cities of Clackamas Co
✓ Paul Berman	Portland
✓ Minky Bluzaid	Portland
✓ JIM HOWELL	AORTA
✓ Ray Polani	CBT
✓ TOM KLOSTER	METRO
✓ John Aul	CLACKAMAS COUNTY
✓ Mike Hoglund	Metro
✓ Linda Peters	Washington County
✓ STEVE DOTTERER	CITY OF PORTLAND STAFF
✓ ROB DRAKE	CITIES OF WASH. CO.

COMMITTEE MEETING TITLE VPACT

DATE 1-12-95

NAME

AFFILIATION

NAME	AFFILIATION
✓ John Callender	Metro
✓ ARIN AMBERLEY	VANCOUVER
✓ ROSS ROBERTS	TRI-MET
✓ Kate Deane	City of Portland
✓ CB ARRINGTON	TRI-MET
✓ Dick Feeney	Tri-Met
✓ Patricia McCarry ✓	Metro
CASIE SHOLT	METRO
✓ Rod Bergman	Clark County
✓ BERNIE BOTTOMLEY	Tri-Met
HEATHER NELSON	METRO
Wanda Waylett	METRO
✓ Elsa Coleman	PDOT
✓ Gordon Oliver	Oregonian
✓ JOHN CHARLES	OR. ENVIRONMENTAL COUNCIL
✓ Dean Lookingbill	RTE
✓ Mary Heagy	WSDOT
✓ Bob Bottomley	MCCI
✓ Kelley Busse	
✓ Fred Nusbauer	AORTA
✓ DAVE WILLIAMS	ODOT
✓ Jane Heisler (for Tom Coffey)	CITY of Lake Oswego
✓ Susie Lohsene	Port
✓ ROD SANDOZ	CLACKAMAS County
✓ Molly O'Reilly	Citizen TPAC member
✓ Kathie Lehtola	Washington Coast

John Kankaya
Washington County