

=====  
Date: 5/12/93  
To: Interested Parties  
From: Dick Feeney  
Re: Tri-Met Funding Update/Bill Status  
=====

**SUMMARY-FUNDING MEASURES**

The remaining parts of the OTP package were marked up through subcommittee this week with do-pass recommendations. They now go before the full committee on Revenue and School Finance, chaired by Delna Jones. Delna has worked closely with the package and appears to agree with the subcommittee recommendations.

The OTP package pertaining to transit which stands before full committee is composed of the following parts:

**Gas Tax:**

- a. 3 cents for 2 years (3X2)

**Registration fee increase:**

- a. \$15/yr., 1/1/94, for highways.
- b. \$20/yr., 1/1/95, for transit.
  - 1. Distribution of \$20 for transit:
    - 5% Intercity transit
    - 5% Statewide equity (1/36 to each county)
    - 90% County and MPO's
- c. A Tri-Met local option, subject to voter approval, to levy a fee or tax on the "ownership, operation, and use" of a motor vehicle.

**Constitutional Amendment:**

- a. Allows fees/taxes on the "ownership, operation, and use" of a motor vehicle to be used for transit.

Tri-Met has also written the ballot title to the Constitution through legislation. This allows us to shape the language appearing in the ballot title, resulting in easier and more favorable understanding at the ballot box. HB 3659 reflects these desires and has yet to be scheduled for a hearing.

The ATU legislation; binding arbitration and elected board, avoided mark up from the Labor subcommittee this week due to Rep. Springer's absence.

Parts of the OTP package are presumably dead, namely: Emission fee (Tri-County and statewide), payroll tax extension, transportation access fee, studded tire fee, tire/battery tax, and bicycle registration fee.

## Tri-Met Pertinent Bills

The Constitutional amendment, vehicle registration fee and gas tax have changed considerably from their original form.

The package secures the support of downstate and metro legislators by funding both the Highway Improvement Program and transit. Pending a favorable recommendation from full committee, it appears to stand a good chance of passage in the house.

### HJR 7-Constitutional Amendment

In response to the death of the emission fee and the desire to use registration fees for transit, HJR 7 has been amended to allow fees on the "operation, use, and ownership of motor vehicles" to be used for transit. This is in marked contrast to the original bill which singled out emission fees.

### HB 2416-Vehicle registration fee increase.

HB 2416 passed through subcommittee at a \$35 increase, divided \$15 for transportation and \$20 for transit. A Tri-Met local option, subject to voter approval, on the "ownership, operation, and use" of a motor vehicle, was also added.

The implementation dates for the \$15 and \$20 fees are 1/1/94 and 1/1/95. The \$15 fee will fund the Highway Improvement Program and the \$20 will be split 5% for intercity transit, 5% for county equity (1/36 to each) and 90% for County and MPO's.

### HB 2415-Gas Tax

The gas tax passed through subcommittee at 3 cents for 2 years (3X2) as opposed to 4X4. The proposed increase to the vehicle registration fee would offset the decrease in gas tax.

### SB 429 (430)-<sup>R</sup>Prohibits transit strikes - binding arbitration

Binding arbitration was recently amended to include final offer arbitration. By deleting all parts of SB 430 and replacing them with the parts of SB 429 (termed "gutting and stuffing"), binding arbitration gained a new relating clause. If passed in the Senate, the new relating clause may place the bill in a committee more lenient to labor legislation in the House.

## Other OTP Action

### HB 2417-Jet fuel tax increase of .5 cents, effective 1/1/94.

- would generate approximately \$3.5 M in six years.
- sent to full committee with a do-pass recommendation of 3 to 2. Amended implementation date to 6/1/95.

### HB 2418-Aircraft license tax increase of 2 cents.

- would generate \$550,000 dollars over the next six years.
- sent to full committee with a do-pass recommendation by unanimous vote.

- HB 2423-Changes sunset on ethanol gas tax from 1/1/97 to 1/1/94.**  
-would generate approximately \$85 M over six years.  
-sent to full committee with a do-pass recommendation by unanimous vote. Amended to change implementation date to 10/1/94 and provide property tax exemptions to future ethanol producers wishing to relocate in Oregon.
- HB 2424-Expands ODOT's bonding authority.**  
-sent to full committee with do-pass recommendation. Amended to require projects constructed with bond revenue to have cost-benefit ratio of greater than 1.
- HB 2428-State "in-lieu-of" payments.**  
-generates approximately \$3.5 M over six years.  
-sent to full committee with a 4-1 do-pass recommendation. Amended to read "assessments to cities or counties which operate fixed-route public transportation service."
- HB 2429-Lottery Money for Marine/Rail.**  
-allocates \$25 M between '93 and '95.  
-sent to Appropriations from former Ways and Means with a do-pass recommendation.

**Bills presumably "dead" unless outside support is generated.**

- HB 2419 - Portland area emission fee
- HB 3173 - Statewide emission fee
- HB 2420 - Employer payroll tax.
- HB 2422 - Studded tire fee
- HB 2425 - Lottery funds for long range transit capitol.
- HB 2426 - Rail fund and bonding authority for high speed rail.
- HB 2427 - tire and battery tax.
- HB 2430 - bicycle registration fee.
- SJR 2 - Constitutional amendment/gas tax for transit



**METRO**

Date: May 19, 1993

To: TPAC

From: *MH* Mike Hogleund, Transportation Planning Supervisor

Re: CO Contingency Plan

Attached is a letter from DEQ describing the proposed CO Contingency Plan measures for discussion at the May 28, 1993 TPAC meeting.

MH:lmk

Attachment

MAY 19 1993

DEPARTMENT OF  
ENVIRONMENTAL  
QUALITY

May 14, 1993

Mr. Andrew C. Cotugno  
Metro  
600 NE Grand Avenue  
Portland, OR 97232-1797

Re: CO Contingency Plan

Dear Mr. Cotugno:

The U.S. Environmental Protection Agency (EPA) issued a 1990 Clean Air Act guidance document in July 1992 indicating that states with carbon monoxide (CO) nonattainment areas, classified as moderate (CO level less than or equal to 12.7 ppm), which would include the Portland area, are required to submit contingency plans as formal amendments to the State Implementation Plan (SIP), by November 15, 1993. The purpose of the contingency plan is to implement additional control measure(s) to offset one year of growth if an area fails to meet the Clean Air Act deadline for CO standards attainment (December 31, 1995). The contingency plan control measure(s) must be implementable without any additional rulemaking on the part of the state, or where applicable, without any additional necessary local ordinances. These measures would be in effect while an overall plan revision is prepared to meet the additional requirements of a Serious nonattainment classification (Attachment 1).

If triggered by a standards violation, a SIP revision meeting the Clean Air Act requirements for Serious nonattainment areas would likely be prepared over a 12-month period in 1996-1997. Since Metro is the designated lead planning organization for transportation related control measures, we would anticipate that a triggered plan revision would involve a significant effort upon your part. However, based on the trend in the Portland area's CO monitoring data (Attachment 2) and the expected continuing substantial decline in tail pipe CO emissions, we consider it unlikely that the contingency plan and a new round of nonattainment planning would be triggered in the Portland area.

In the unlikely event of a standards violation, the required Serious area plan revision would be aimed at meeting CO standards by December 31, 2000. For the contingency plan due November 15, 1993, EPA suggests that areas consider boosting the effectiveness of any



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DEQ-1



Mr. Andrew C. Cotugno  
May 14, 1993  
Page 2

existing transportation control measures, or consider any of the prescriptive measures for Serious nonattainment areas. EPA has also indicated that increasing the required oxygen content of wintertime motor fuel above the existing level of 2.7% would be acceptable.

A preliminary analysis by the Department indicates that boosting the required oxygen content of wintertime motor fuel to 3.1% from the existing 2.7% level in conjunction with normal fleet turnover would be more than sufficient to satisfy EPA's contingency plan guidance. It should also be a relatively easy program to adopt as the required SIP revision. However, other measures that are being considered for the Portland ozone maintenance plan would also work in some combination to meet EPA contingency requirements. Such other measures include expanding the vehicle inspection boundary, locking in the 1974 model year into the vehicle inspection program, and an employer trip reduction program. (The employer trip reduction program is a prescriptive measure from the Clean Air Act for Serious nonattainment areas and as such, would need to be developed in the event of failure to meet the CO standards attainment deadline.) The three other potential transportation control measures, however, would take considerable time to reach consensus--likely more time than we have to meet this year's submittal deadline.

In order to meet the November 15, 1993, deadline for contingency plan submittal, we will have a relatively short period of time to put together a SIP revision package to go through the Environmental Quality Commission rulemaking process. A reasonably complete package of contingency measures is needed by June 14, 1993, in order to conduct formal public hearings in August 1993, with final consideration by the Environmental Quality Commission in October 1993.

The Department requests that you advise us by June 1, 1993, as to what contingency plan elements Metro would favor. Howard Harris (229-6086) will be the lead Air Quality Division staff person for the contingency planning effort.

Sincerely,



Steve Greenwood  
Administrator  
Air Quality Division

SPG:HWH:a  
LTR\AH71486  
Enclosures  
cc: TPAC  
JPACT

**Additional Control Measures for  
Serious Carbon Monoxide Areas**

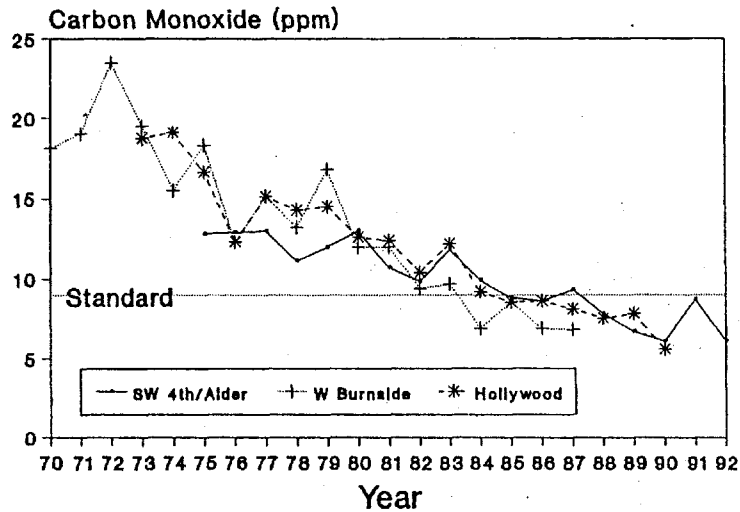
The additional control measures applicable to existing CO nonattainment areas in Oregon that fail to meet the standards attainment deadline of December 31, 1995, are listed below.

- 1) Vehicle Miles Traveled (VMT) Forecasting
- 2) Contingency Provisions triggered by VMT levels that exceed the forecast
- 3) Enhanced Vehicle Inspection and Maintenance (I/M 240)
- 4) Attainment Demonstration
- 5) VMT--a) TCM reductions providing annual 3% reductions from baseline emissions; b) employer (100 or more employees) trip reduction program

Note: The requirements under this section of the Act can be waived or substituted in whole or part with adequate justification

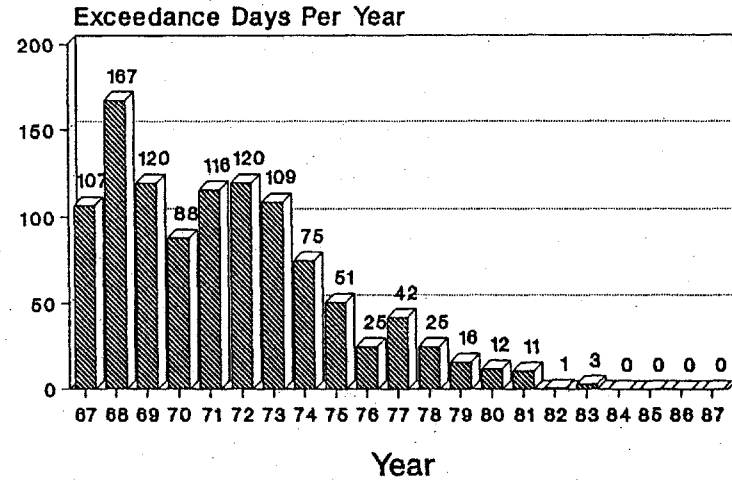
- 6) CO Milestone demonstration with respect to annual emission reductions (A new milestone date would be negotiated with EPA)

### Portland Carbon Monoxide Trends

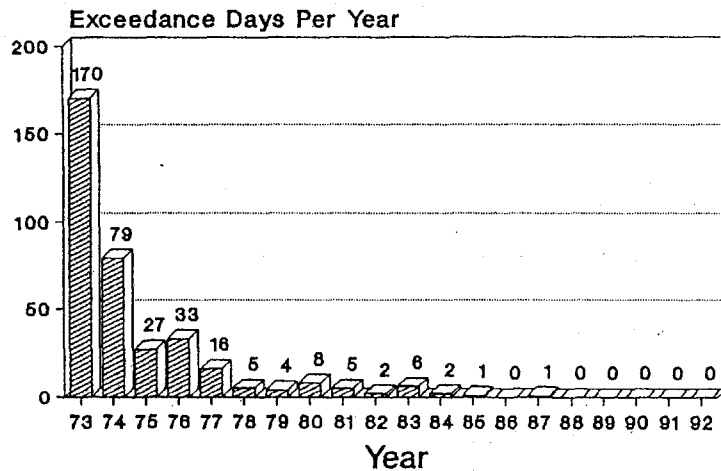


2nd Highest Day Per Year (8-hr avg)

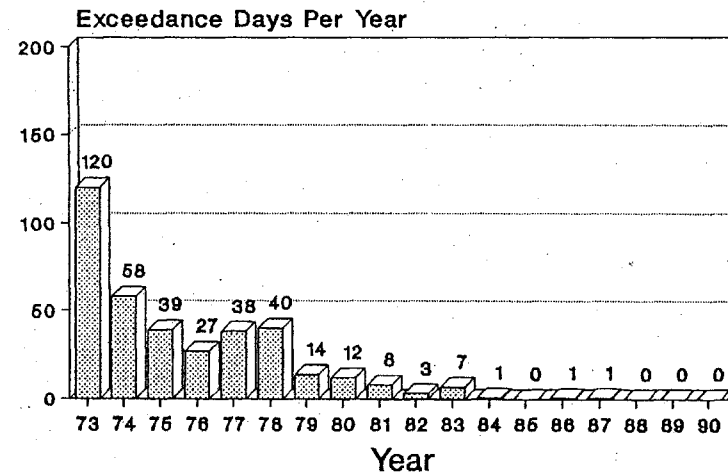
### Portland Carbon Monoxide Violations At CAMS Site, 718 W. Burnside



### Portland Carbon Monoxide Violations At S.W. Fourth & Alder Site



### Portland Carbon Monoxide Violations At Hollywood Site, N.E. 41st & Sandy






**METRO**

**Date:** June 2, 1993

**To:** Councilor George Van Bergen, JPACT Chair, and JPACT Members

**From:** John Fregonese, Manager, Growth Management  
Planning Department 

**Regarding:** **Region 2040 Background and Update**

**Background**

Region 2040 is a Metro managed project to coordinate land use and transportation planning in the region for a 50-year planning period to the year 2040. Land use aspects of the project include addressing the challenges of land use development in the region while managing the urban growth boundary and meeting the urban reserves rule. Transportation planning aspects include meeting the transportation rule and air quality standards while providing mobility for the region. Region 2040 will guide the new Regional Transportation Plan as well as providing detail to the Regional Urban Growth Goals and Objectives. Above all, Region 2040 seeks to link transportation and land use policies and practices as closely as practical.

Region 2040 was initiated in January 1992. In November 1992, the voters of the region adopted the Metro Charter. As a result, Region 2040 has been reshaped to be consistent with and respond to the requirements of the Charter. Specifically, the project has been revised to address the elements of the Regional Framework Plan mandated by the Charter and aspects of the project will help provide a factual basis for the Future Vision. In other words, the reshaped products of Region 2040 will provide the elements to the charter mandated Regional Framework Plan.

The project is funded by Metro through excise taxes and STP funds as well as by Tri-Met, ODOT, and the cities and counties of the region through local government dues.

**Phase I**

Region 2040 has been divided into phases. Phase I, roughly calendar year 1992, placed a heavy emphasis on understanding more about the public's hopes and concerns regarding the future. A 405-person telephone survey of residents of the region was completed as were stakeholder interviews, a growth conference, open houses and local government workshops.

In the first part of the year, participants were asked about their preferences concerning transportation (a large percent favored substantially more emphasis on light rail) and land use issues (about as many people favored a suburban type of office and commercial development as downtown-type development). Most participants voiced concerns about various aspects of continued livability of the region.

In the second part of the year, draft growth concepts were completed. Three basic growth concepts were devised: 1) Concept "A," which accommodated expected future growth by making few changes to existing comprehensive plans and expanding outward in a concentric way; 2) Concept "B," which accommodated growth through more compact development patterns within the existing urban growth boundary; and 3) Concept "C," which accommodates growth through a combination of some compact growth and the balance through "satellite" centers. Using open houses, local government workshops, a call-in cable television program and review by Metro advisory committees including JPACT as well as public hearings before the Metro Council, the question was asked "Is this a reasonable range?" Although there were many specific concerns about the details of transportation facility alignments or land use densities in specific areas, generally there was agreement that the growth concepts presented were a reasonable range with the following major exceptions: 1) many people felt that too much growth was projected or expected and that a slow growth alternative should be crafted; 2) Concept "C" showed satellites too close to the rest of the region; and 3) an effort should be made to distinguish between past policies and practices (a "Base Case") and likely future policy directions (Concept "A," which would include some expansion of the urban growth boundary in a circumferential pattern, but "artfully," that is, making use of transit and redevelopment opportunities where possible, while recognizing the continuing appeal of auto travel). The Metro Council adopted Resolution No. 92-1712C in December 1992, authorizing staff to begin detailing the growth concepts and to begin the computer modeling. In addition, staff was directed to conduct a growth analysis about what policies might increase or decrease the rate of growth and the likely consequences of following such policies. (For more information about Phase I, see ECO Northwest Reports.)

## Phase II

Phase II of Region 2040, begun in January 1993, is designed to accomplish the following: 1) provide detailed regional land use/transportation alternatives based on an explicit set of assumptions; 2) produce estimates of the likely costs and consequences for each growth alternative; 3) design a public involvement process that will provide the public and policymakers with timely and adequate opportunities to shape a favored alternative; and 4) facilitate a decision about which growth alternative (or more likely, what combination) is the favored alternative.

Throughout the first quarter of the year a computer model was refined and completed. The model takes population and employment forecasts for the four-county area, allocates the growth to various parts of the region based on accessibility and economic indicators, adds transportation capacity and then predicts the performance of transportation system. This model has been used to complete a Metro staff Base Case. After review of the model methodology and the output, local government transportation planners (TPAC members primarily) and land use planners (RTAC members primarily) made extensive suggestions about assumptions and methods. A second Base Case was completed consistent with these suggestions. Currently, technical assumptions about Concepts A, B and C are being reviewed by the planners of the region. By the end of the summer, Concepts A, B and C should be completed. (For more information about the computer

Memorandum  
June 2, 1993  
Page 3

model or the Base Case see Metro staff reports "User's Summary" and "Base Case I," "Base Case II" - these will be made available at your meeting.)

As noted earlier, Metro staff have been charged with assessing the consequences of changes rates of growth. A request for proposals for this work has been completed. However, as many of the questions about growth rates are also related to questions about the costs and consequences of growth alternatives, these work efforts are being combined. Metro staff will be responsible for describing growth alternative performance for some factors (e.g., air quality and vehicular energy consumption), while consultant aid will be sought for others (e.g., housing costs). A combined request for proposal is nearly complete and will be ready for release in the near future.

All of these work products, detailed regional growth alternatives, predicted costs and consequences, would not be useful unless a means for public involvement is prepared. A public involvement plan has been prepared which identifies specific groups and public involvement strategies tailored to group characteristics and needs. The involvement effort will provide newsletter type updates, growth conferences, video conferences, local government workshops, open houses and a video program. Every effort will be made to make the information available to the public and for the responses to be provided to policy makers in a timely manner.

The final portion of Phase II will be to facilitate a decision by the Metro Council. We have designed the work effort to provide the Metro Council with sufficient information to make this decision by May 1994. This decision will be based on direct public comment as well as the recommendations from Metro advisory committees, especially JPACT, with its charge for reviewing transportation issues. Prior to the decision making process, we will focus our efforts on reaching a broad public audience. After December, the decision making process goes into full swing. Sixty to seventy percent of our program budget will fund public involvement projects scheduled from January to May 1993.

#### **JPACT Role**

Currently, there are assumptions being reviewed by the planners of the region concerning the growth Concepts A, B and C. Once this work is completed on technical level, MPAC will be reviewing them for policy issues. Now is the time for participation in shaping the more detailed growth concepts by reviewing the basic assumption. JPACT could choose to review this work effort. Should it not choose to do so, JPACT review would be sought as the decision about the favored alternative is shaped. We are willing to facilitate either participation choice that JPACT might wish. Please let us know how you wish to proceed.



ANDY COTUGNO  
PLANNING DIRECTOR  
METRO

**METRO**

**Date:** June 9, 1993  
**To:** User's Group  
**From:** John Fregonese, Manager, Growth Management  
Planning Department  
**Regarding:** A Flexible Modeling Schedule



We believe that it would be advisable to adopt a flexible meeting schedule for reviewing model results. As many of you know, Base Case II required a major revamping of the database to address your concerns. This has expanded the database from a few thousand records to over 40,000. While the results are much better, the time required to prepare and analyze a model run have increased as well.

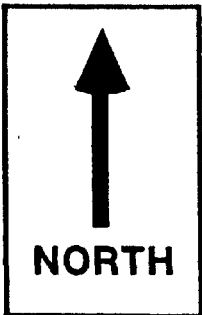
The Base Case II results are being rerun this week after discovering a technical flaw in the model run. This flaw affects densities inside the UGB/UGA. We have also decided to run a variation of Base Case II, consistent with the Metro resolution, which substitutes arterial improvements for freeway improvements (Westside Bypass, Sunset Corridor, Mt. Hood Parkway). Some good news is that the second and third runs are proceeding much more rapidly than the first run. We will need a meeting to discuss the results of these two runs.

Secondly, the staff is preparing a detailed description of the policies and assumptions for "A," "B" and "C" as well as preparing maps that show what we think the results of these policies will be. In the interest of using this group's time to the best advantage, we feel it is more useful to present a staff version of "A," "B" and "C" and get your reactions, rather than take many meetings to arrive at these decisions as a group. Therefore, we will call a second meeting when we are ready to go over the inputs to the concepts before we test them with our models. After the model runs, we will convene another meeting to discuss the results and make any changes necessary.

As a result, we are asking for your continued participation, but we will have fewer meetings that cover more topics. Since we are aware of your busy schedules, we wish to make the best use of your time when you do come and work with us on regional problems. We believe that these changes will make the sessions more topical, interesting and robust.

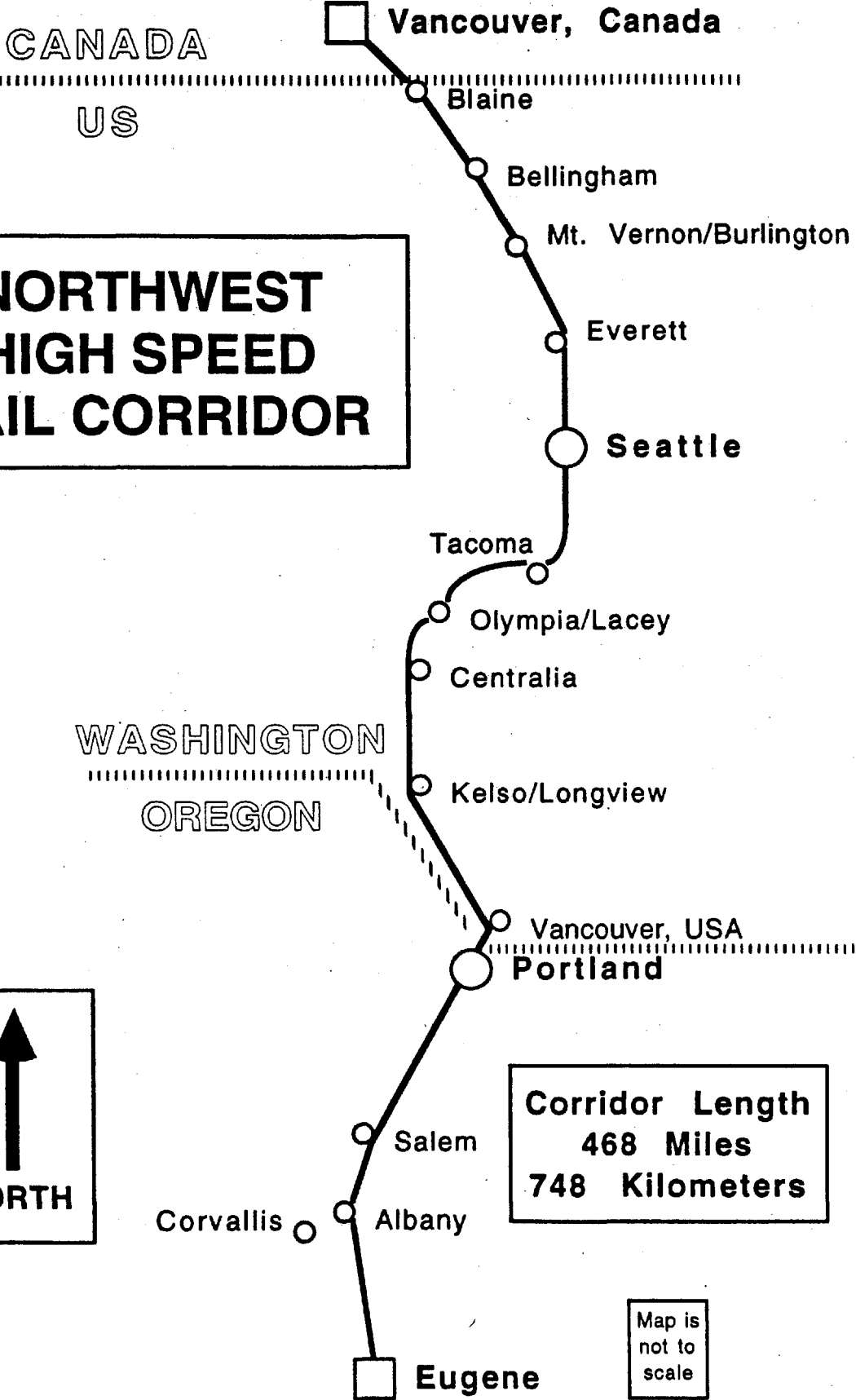
At the present time, we expect that Base Case II will be ready for your review in two weeks and the inputs to "A," "B" and "C" one to two weeks later. Thank you for your continued interest in Region 2040 and Metro planning.

# NORTHWEST HIGH SPEED RAIL CORRIDOR



Corridor Length  
468 Miles  
748 Kilometers

Map is  
not to  
scale



# **OREGON'S HIGH SPEED RAIL CORRIDOR**

**OREGON-WASHINGTON STATE LINE TO EUGENE**

**Length: 133 Miles**

**Stations: Albany, Eugene,  
Portland and Salem**

**Top Speed: 125 MPH**  
Tilt Train Technology using Improved Existing Track

**Running Time Portland - Eugene:  
1 hour, 40 minutes**

**Main Concerns: Livability & Safety**

**Estimated Cost: \$450 Million**

**Proposed Design & Construction  
Time: 6-8 Years**

# HIGH SPEED RAIL

## TYPES OF SERVICE

- **Light Rail (MAX):** **60 MPH**  
City and Suburban Service - Frequent Stops
- **Commuter Rail:** **79 MPH**  
Local service in and out of Large Cities - Frequent Stops
- **Conventional Intercity Rail (Amtrak):** **79 MPH**  
Regional and Long Distance Service - One Stop per City
- **Tilt Train** (X2000/Renfe Talgo): **125-150 MPH**  
Uses Existing Track Safely with Minimal Improvements.  
Portland to Eugene in 100 Minutes (1 hour 40 minutes)
- **TGV, Shinkansen, ICE, AVA ("Bullet Trains"):** **160-300 MPH**  
New Railroad Construction at \$20 to \$30 Million per Mile
- **Mag Lev:** **300 MPH**  
New Technology - Requires A Totally New Infrastructure



METRO

**DRAFT**

June 10, 1993

Mr. William Blosser, Chair  
Land Conservation and Development Commission  
1175 Court Street, NE  
Salem, OR 97310

Dear Mr. Blosser:

On behalf of the governments of the Metro area and Metro's Joint Policy Advisory Committee on Transportation (JPACT), I wish to state support for the element of the Governor's budget dealing with integration of land use and transportation planning. As you are aware, regional and local governments are actively developing updated comprehensive plans to meet the requirements of LCDC's Administrative Rule for Goal 12 - Transportation. This effort is critical to ensure a multi-modal transportation system is implemented which is well integrated with new development.

Additionally, there is a critical need to integrate local land use planning with ODOT's corridor and transportation system planning. Grants to assist in this effort will be very helpful. We are also encouraged by the proposed cooperative local/state program to test and demonstrate new methods of urban growth management. It will enable us to further benefit from approaches which make land use and transportation mutually supportive.

The proposed budget includes \$6.2 million for ODOT and \$1.1 million for DLCD to be administered on a joint venture basis. We are particularly encouraged by aspects of the proposal to ensure coordination in the four Metropolitan Planning Organization areas (Portland, Salem-Keizer, Eugene-Springfield, and Medford) and the provision of grants to local governments to assist in meeting this new state mandate. We look forward to adopting local plan revisions which can be a guide to changes in private development patterns and local public investments in infrastructure and serve as a blueprint for targeting of state programs and investments.

Thank you for your consideration.

Sincerely,

George Van Bergen, Chair  
Joint Policy Advisory  
Committee on Transportation

CC: Richard Benner  
Don Forbes





METRO

**DRAFT**

June 10, 1993

Mr. Michael Hollern, Chair  
Oregon Transportation Commission  
135 Transportation Building  
Salem, OR 97310

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Thank you for your consideration.

Sincerely,

George Van Bergen, Chair  
Joint Policy Advisory  
Committee on Transportation

CC: Richard Benner  
Don Forbes

## ODOT/DLCD URBAN MOBILITY/URBAN GROWTH MANAGEMENT PROGRAM

## Presentation to Joint Policy Advisory Committee on Transportation

June 10, 1993

## I. WHAT PROPOSAL IS

A. A Package of Grant Funds for Local Governments and Technical Assistance

B. Three Categories of Grants

## 1. TPR implementation

a. purpose: to aid local implementation of TPR

b. eligible uses:

i. updating transportation system plans

ii. ordinance amendments

c. *in addition to* ODOT-programmed funds for MPOs and corridor planning -- intended for cities and counties

d. \$2.3 million in Governor's proposed budget

## 2. Land use planning in conjunction with ODOT transportation planning

a. purpose: to enable transportation strategies that require land use plan changes

b. eligible uses:

i. analysis of possible land use plan amendments in conjunction with ODOT transportation planning

ii. adoption of land use plan amendments, if part of strategy selected in ODOT-related transportation system and corridor planning

c. \$1.4 million in Governor's proposed budget

## 3. Testing and demonstrating urban growth management tools

a. purpose: strengthen capacity to actually achieve land use plans

- b. eligible uses: recommendations of urban growth management task force
- c. continues and expands DLCD's \$400 K urban growth management grant program this biennium
- d. examples include:
  - i. transportation-efficient land use models, like Sunnyside Rd. project
  - ii. infill and redevelopment strategies
  - iii. specific development plans, like SE Division and Tigard Triangle projects
- e. \$1.1 million in Governor's proposed budget

## II. ADMINISTRATION

- A. By ODOT, In Consultation with DLCD, Operating Through Region Offices
- B. In MPO Areas, Part of Unified Work Program
- C. Two Levels of Criteria
  - 1. Statewide level
    - a. on subjects like eligible uses and local match requirements
    - b. will be formulated with input from FHWA, LOC, AOC, and MPOs
  - 2. Local Level
    - a. will address other, local issues
    - b. in metro area, TPAC and JPACT will formulate with ODOT and DLCD
- D. Differences in Third Grant Category
  - 1. As mentioned, test and demonstration
  - 2. Not limited to where ODOT transportation planning occurring
  - 3. Greater state-level role

## III. PROPOSAL STATUS IN LEGISLATURE

- A. Governor's Adjusted Recommended Budget

1. ODOT: 4.5 FTE, \$6.2 million
2. DLCDC: 5.5 FTE, \$1.1 million
3. Sources: ISTECA (STP), lottery, general funds

B. Action by Legislature to Date

1. ODOT: 4.5 FTE, \$6.3 million approved by Senate Appropriations Committee; House concurrence expected
2. DLCDC: 3 FTE, \$400,000 approved by Senate; House action deferred pending resolution of secondary lands issue, but well received in Appropriations Subcommittee
3. Sources: ISTECA and lottery

IV. REQUEST

Recommendation to JPACT to Endorse

JCK/jck  
<ugm>outline.jpact

## ODOT/DLCD Urban Mobility/Urban Growth Management Program (With Grant Amounts)

### The Outlook

If present trends continue, Oregon's growing population will bring rising transportation costs, declining mobility, eroding livability, and reduced economic competitiveness.

We can avoid this prospect only if more people in urban areas make at least some of their local trips by transit, bicycle, or walking, instead of by car. That won't happen unless present development patterns change to make transit, biking, and walking more convenient.

That means changing land use plans. It also means strengthening how land use plans are translated into the way communities get built. Actual recent development supports transit, biking, and walking even less than what our land use plans call for.

Any of Oregon's large and fast growing urban areas demonstrate the high costs present land development patterns impose. The excessive congestion on Route 97 through Bend is one example. A new bypass of Route 97, itself built as a bypass, will cost over \$72 million.

Land development patterns *now being established* will determine future transportation needs, feasible alternatives to meet them, and their cost. Judging from the gridlock that seized Seattle in no more than ten years, Oregon must act quickly.

### The Opportunity

With the Intermodal Surface Transportation Efficiency Act (ISTEA), the federal government recognized that alternatives to highway construction often can better meet transportation needs, even from the standpoint of the automobile user. And it freed up money.

### The Challenge

The Oregon Transportation Commission and its department, ODOT, hold jurisdiction over state transportation facility planning and construction, but the Land Conservation and Development Commission and its department, DLCD, hold jurisdiction over land use.

### The Proposal

Blur the jurisdictional boundaries. Mount a joint ODOT/DLCD program to integrate:

- planning for state transportation facilities,
- local government revision of comprehensive plans to permit less auto-intensive approaches to meeting state transportation facility needs, and
- the introduction of new tools to enable local governments actually to achieve the changed development patterns revised plans call for.

### The Dollars

The total budget is \$7.2 million. \$5 million are grants to local government. \$5.5 million come from ISTEA funds (76 percent), \$1.4 million from lottery dollars (19 percent), and \$398,000 from general funds (5 percent).

### The People

Of the ten-member team, 4.5 FTE would be ODOT staff and 5.5 DLCD staff. Of the ODOT FTE, 3.5 would be stationed "close to the customer" at region offices. Of the DLCD positions, three would replace limited duration positions which expire June 30, 1993.

## The Strategy

A four-part strategy to reduce present spread-out, overly auto-dependent development patterns and the traffic congestion and erosion in livability they cause:

1. Funds to local governments to update their *transportation* plans and ordinances to enable more people to make *some* of their trips on foot, by bicycle, in a carpool, or on transit, rather than by car, as required by the Transportation Planning Rule.

Grants \$2.3 million

2. Where ODOT is involved in examining alternatives for meeting transportation needs, funds to local governments to examine how changing their *land use plans* could permit alternatives that reduce needed street and highway expenditures by increasing the travel needs which can be met by walking, biking, carpooling, or transit. Where such an approach is selected, the strategy will fund necessary land use plan amendments.

Grants \$1.4 million

3. Funds to local governments to test and demonstrate new tools for urban growth management. These tools will help implement the community visions revised local plans are expected to contain. Actual development now fails to implement even what *present* land use plans call for.

Grants \$1.1 million

4. Promotion of pedestrian and transit-friendly development using a public information program, an awards program modeled after the "Super Good Cents" energy conservation program, actions to reduce biases against such development among lenders and in local zoning and subdivision ordinances, and assistance to developers.

*Willamette Valley  
Transportation Strategy  
and  
High Speed Rail  
Implementation Project*

- CONCEPTS
- PROCESS
- CALENDAR
- BUDGET

April 28, 1993

# **WILLAMETTE VALLEY TRANSPORTATION STRATEGY**

## **GOALS**

- To develop a High Speed Passenger Rail system along the Northwest Corridor from Eugene, OR to Vancouver, B. C. by the year 2000. (OTC Initiative)
- To establish a multimodal Willamette Valley Transportation System Coordination effort in cooperation with MPO's and local governments. (OTP Commitment)

## **ACTION PLAN**

Pursuit of these two goals simultaneously will require the integration of state and local planning, project development and implementation efforts in close coordination. This prospectus outlines an organizational structure, schedule and budget to accomplish both goals.

A compressed development process is proposed which allows initial construction to begin while project development work is underway on later phases. ODOT would need to establish, facilitate and staff four parallel efforts, all proceeding on expedited schedules:

- Willamette Valley Strategy Coordination
- Initial Passenger Services Improvements
- High Speed Rail Planning and Project Development
- Initial High Speed Rail Construction

## **STRATEGY OVERVIEW**

### **1. Willamette Valley Transportation Strategy Coordination**

- a. Defines the WVTS coordination area and planning needs
- b. Establishes a cooperative strategy setting framework.
- c. Develops the planning context for system improvements such as High Speed Rail, intercity bus, road improvements, etc., consistent with the OTP, MPO and corridor planning.

### **2. Initial Passenger Services Improvements**

- a. Establishes Mt. Rainier service to Eugene.
- b. Develops intermodal terminals.
- c. Establishes interim connector and feeder bus services.



### **3. High Speed Rail Planning and Project Development**

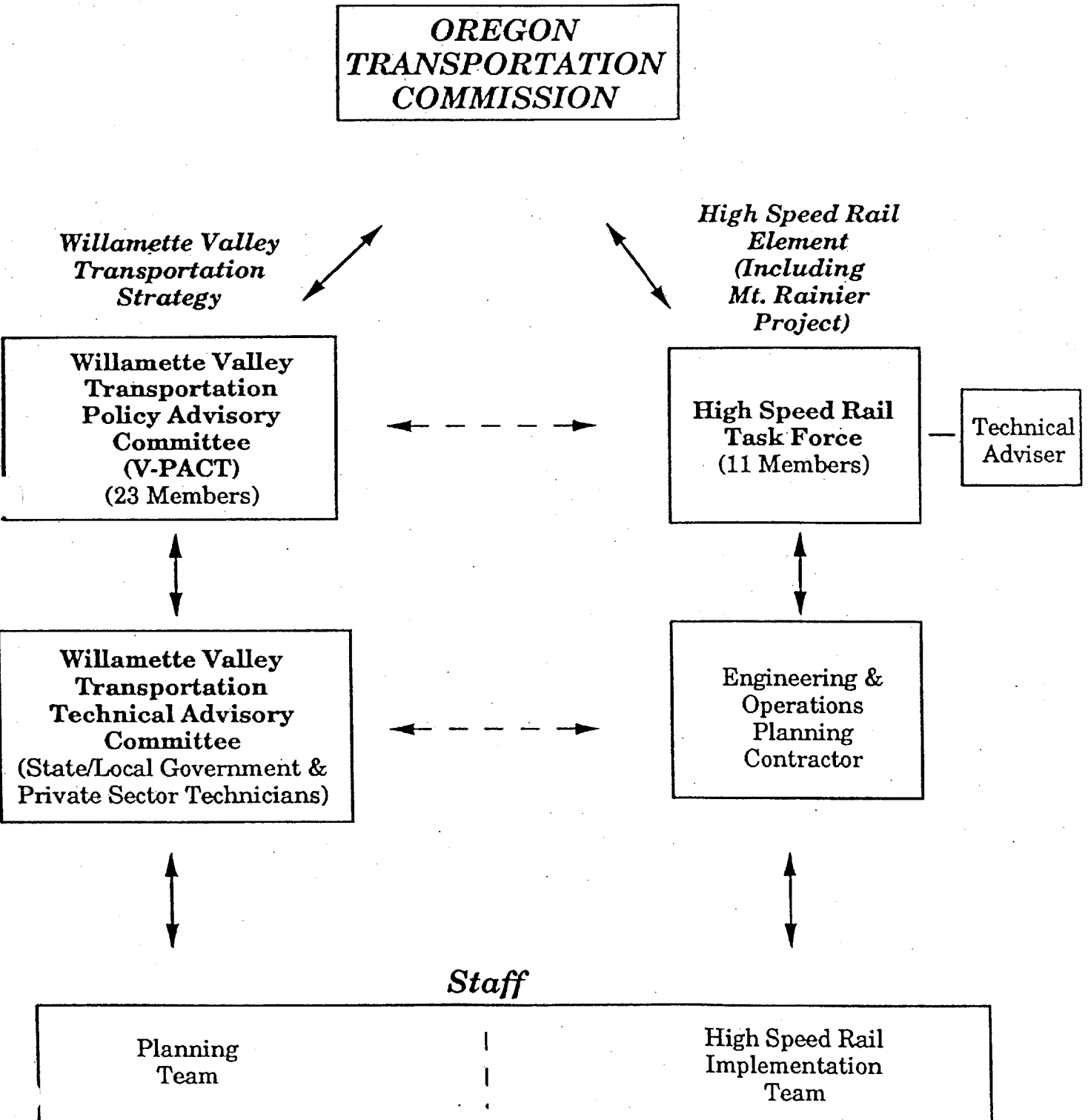
- a. Undertakes the necessary project development work over the next two years to move the project to a decision point for full implementation of 125 mph High Speed Rail service.**
- b. This work includes coordination, planning, demand analysis, service design, engineering, cost estimating, scheduling, financial feasibility, environmental analysis and public involvement.**

### **4. Initial High Speed Rail Construction**

- a. Begins implementing an initial package of capital improvements that have an immediate pay off in terms of travel time savings or facilitate intermodal connections to improved rail services.**
- b. Utilizes state funds to leverage federal, local and private funds that are available for High Speed Rail to construct elements of the system that do not require further development work.**
- c. Increases average train speed from 48 mph to 60 mph saving 28 minutes in running time.**

# WILLAMETTE VALLEY TRANSPORTATION STRATEGY

## PLANNING AND IMPLEMENTATION STRUCTURE



# WILLAMETTE VALLEY TRANSPORTATION STRATEGY

## Willamette Valley Policy Committee On Transportation (V-PACT)

### Role

- To develop a coordinated, long range, transportation strategy for the Willamette Valley consistent with the vision, goals and policies, and system elements of the Oregon Transportation Plan including the development of a high speed rail system within the Valley;
- To raise and resolve transportation issues affecting public and private jurisdictions within the Willamette Valley;
- To coordinate technical studies in the development of the transportation strategy;
- To oversee a public information and involvement process;
- To advocate adoption of the transportation strategy by the Oregon Transportation Commission, and implementation of the strategy by affected public and private jurisdictions.

### Membership (23 members-Elected Officials/Decision-makers)

Chair:	Oregon Transportation Commission (or designee)
MPOs:	J-Pact, Mid-Willamette COG, Cascades West COG, Lane COG
Counties:	3 Counties (AOC selected)
Cities:	3 Cities (LOC selected)
Transit:	(Districts) Tri-Met, Salem, Lane
Passenger:	Intercity Transit, Air
Freight:	Port, Rail, Truck
Business:	2 general business representatives
Citizen:	2 lay citizens

### Products

- A coordinated Willamette Valley Transportation Strategy with a high speed rail element
- A transportation finance program and legislative package to implement the Strategy
- A recommendation for an continuing transportation coordinating structure

### Relationships

- Assisted by the Willamette Valley Transportation Technical Advisory Committee
- Work directly with the High Speed Rail Task Force through shared membership, periodic reports and joint meetings, and shared staff
- Work through ODOT region managers and existing local transportation planning organizations in order to involve the general public in the planning process

# WILLAMETTE VALLEY TRANSPORTATION STRATEGY

## High Speed Rail Task Force

### Role

- Serve as a "blue ribbon" task force;
- Guide the development and conduct of the high speed rail market analysis;
- Advise the Willamette Valley Policy Committee on Transportation (V-PACT) on high speed rail issues;
- Guide the implementation of a high speed passenger rail system in the I-5 corridor of the Willamette Valley between Eugene and Portland with connection to Seattle and Vancouver B.C.;
- Resolve policy issues arising from project development.

### Membership (11 members)

Chair: Transportation Commission member (or designee)  
State: Governor designee, PUC designee  
Cities: 2 Cities (LOC selected)  
Counties: 2 Counties (AOC selected)  
Specialists: Economist, Financier  
Rail: Southern Pacific, AMTRAK  
Interstate: Wash DOT (non-voting)

### Products

- A market analysis of a high speed rail system as an element of a Willamette Valley transportation system;
- A financing program for project implementation;
- Phased construction and operation of a high speed rail system in the I-5 Corridor by a date to be determined (2000 ?).

### Relationships

- Assisted by the Willamette Valley Transportation Technical Advisory Committee, and High Speed Rail Technical Advisor
- Work directly with the Willamette Valley Policy Committee on Transportation through shared membership, periodic reports and joint meetings, and shared staff
- Oversee the implementation of the High Speed Rail Project with the assistance of the High Speed Rail Implementation Team.

# WILLAMETTE VALLEY TRANSPORTATION STRATEGY

## Willamette Valley Transportation Technical Advisory Committee (V-TAC)

### Role

- Identify issues and alternative approaches to transportation system development and coordination within the Willamette Valley.
- Recommend transportation alternatives to the Policy Committee.
- Review and recommend action on technical studies presented by various jurisdictions and consultants.

### Membership

Chair:	ODOT Program Manager
City:	Transportation Planners
County:	Transportation Planners
MPO/COG:	Transportation Planners
Transit:	District Planners
State Agencies:	DLCD, PUC, DOE, EDD, DEQ
ODOT:	Policy and Strategic Planning, Transit, Corridor Planning, Right of Way, Aeronautics, Region Planners
Rail:	Southern Pacific, Burlington Northern

### Products

- Advice and comments

### Relationships

- Provide technical assistance and coordination services to the Willamette Valley Policy Advisory Committee.
- Work with the High Speed Rail Task Force by reviewing the work of staff and consultants.

## Public Participation in the WVTS

### Assumptions:

Existing committees in the (4) MPOs and for corridor strategies will be used as much as possible for input.

The project will be coordinated with other ODOT planning processes as much as possible.

<u>Month</u>	<u>Activity</u>
May	Develop brochure and/or video jointly with corridor planning to explain planning projects
June	Meeting of V-TAC to outline possible issues and strategy directions and work program
July	Meeting of V-PACT to discuss outlined issues, to add others, and to adopt a work program
August	Produce newsletter to introduce advisory committees and WVTS issues (Newsletter may be an insert to corridor planning newsletter)
September	Meet with MPO JPACT and TPAC to introduce planning process and issues
October- December	Draft policies and strategies through V-PACT and V-TAC
January	After V-PACT drafts policies for Willamette Valley Transportation Strategy, produce newsletter (or newsletter insert) which summarizes the policies and strategies and announces the public meetings
February- March	Hold two-three public meetings in each of the (4) MPOs to get comment on the policies and strategies. These might be held in conjunction with Public Transportation Plan meetings.
April	V-PACT and V-TAC decide on modifications to the policies and strategies based on the public comment  Produce newsletter (or newsletter insert) to summarize public comment and announce public hearing
May	Hold a public hearing on Valley strategy

**HIGH SPEED RAIL PROJECT**  
**Preliminary Budget - 24 months**

**EXPENSES**

Planning Elements

Implementation and Special Studies (Consultant)		
• Origin/Destination Analysis		
• Intermodal Options and Mode Splits		
• Land Use and Environmental Issues		
• Refined Ridership/Revenue Projections		\$205,000
Contribution toward V-PACT studies		\$35,000
Engineering and Operations Planning & Analysis (Consultant)		\$262,600
Staffing for Project (In-house or consultant)		
• Program Manager	\$110,000	
• Project Engineer	90,000	
• Public Involvement Specialist	80,000	
• Secretary	44,000	
• Fringes @ 35%	113,400	
		\$437,400
Supplies and Materials for Public Involvement Activities and other Project functions		<u>\$60,000</u>
	Total	\$1,000,000

Construction and Implementation

Capital Projects		
• Grade Crossing Signal Improvements		\$9,805,000
• Train Control Systems		2,608,000
• Track Renovations		34,600,000
• Station Remodeling and Access		2,710,000
• Supporting Bus Service, Engineering and Contingencies		<u>6,535,000</u>
		\$56,258,000
Operating Support		
• Extension of Mt. Rainier Train		<u>\$1,000,000</u>
	Project Total	\$58,258,000

**RESOURCES**

Planning

1993-95 Governor's Budget	\$1,000,000
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Construction and Implementation

1993-95 Governor's Budget		
High Speed Rail	\$9,200,000	
Mt. Rainier Extension	\$1,000,000	
		\$10,200,000

Potential Federal Funds	45,000,000
Local and Private Sector Contributions	<u>2,058,000</u>
<b>Total Resources</b>	<b>\$58,258,000</b>

**WILLAMETTE VALLEY TRANSPORTATION STRATEGY  
SCHEDULE (Draft 4/28/93)**

		1993								
		April	May	June	July	August	Sept.	October	Nov.	Dec.
<b>Willamette Valley Strategy</b>	<b>Planning Element</b>	Develop packet to explain planning project	*Mgmt team approve committee structure *OTC approve structure *Form committee *Hold 1st meeting *Assign ODOT staff	Design Willamette Valley Planning Strategy with committee		Release RFP's for feasibility studies: *Market analysis *Intermodal Options/ Mode Split *Financing *Land use analysis	Consultant selected	Begin Valley Strategy		
	<b>Construction Element</b>									
<b>Mt. Rainier Project</b>					Decide Interim Option			Secure Amtrak commitment	Make capital improvements for train operations	
<b>High Speed Rail Project:</b>	<b>Planning Element</b>			Review rail plan	X2000 train demonstration (3 days)	Joint release RFP for market analysis	Consultant selected	Develop high speed rail market analysis		Complete high speed rail market analysis
	<b>Construction Element</b>				*Write RFP for rail system engineering services *Begin rail track improvements Union Station area	Release RFP for engineering services	*Engineering consultant selected *Begin crossing/ signal improvements			





**WILLAMETTE VALLEY TRANSPORTATION STRATEGY  
SCHEDULE (Draft 4/28/93)**

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	1995	1996	1997	1998	1999
<b>Willamette Valley Strategy</b>	Legislative Session		Legislative Session		Legislative Session
<b>Mt. Rainier Project Element</b>					
<b>High Speed Rail Project Element</b>		Phase II Funding	Phase III Funding		Trains Operating (December 1999)



## METRO

Date: May 17, 1993  
To: Portland City Council  
From: JPACT  
George Van Bergen, Chair  
Re: Eastbank Freeway

On behalf of the governments of the Portland metropolitan area, these comments were approved for transmittal to the Portland City Council by the Joint Policy Advisory Committee on Transportation (JPACT) at their May 13, 1993 meeting.

I-5 from the Marquam Bridge to the Banfield Freeway is a critical transportation route of regional, statewide and national significance. Through the regional partnership, the currently recommended improvements to the Eastbank Freeway have been identified and committed to as part of the regional transportation improvement strategies. We understand that the City of Portland is interested in broader objectives relating to reclaiming the Eastbank Esplanade and is therefore rethinking the currently planned improvements. In so doing, the City Council should be cognizant of the region's interests in this issue.

1. I-5 and I-405 play a critical role in providing the interchange for travel movements between all of the radial freeways, highways and city streets entering the Central City area. It is the very center of the system and provides the means for traffic to and from all of these routes. As such, a project on this loop is unlike any other stand-alone project in the region. Removal of this link would therefore not just affect traffic in the Central City area but also have an effect on accessibility via all of the radial routes accessing the Central City. This segment of I-5 is a critical link for both movement of people and goods. I-405 and I-205 are already carrying trips that can most appropriately be diverted from I-5. The North/South light rail corridor will not lessen the need for this link. Hopefully, it will accommodate expected growth, but it cannot handle all the system functions now served by this segment of I-5, and

certainly not any of the freight movement functions. Accordingly, JPACT opposes elimination of this section of I-5 unless the critical transportation functions it serves are met in some other efficient, cost-effective manner. Furthermore, allowing the status quo to remain is equally unacceptable.

2. One of the major radial routes is McLoughlin Boulevard. The East Marquam Phase IV project is intended to improve the access for this major connection from Clackamas County to the I-5/I-405 loop and therefore to the rest of the radial routes. This connection, currently made via Grand Avenue and Martin Luther King Boulevard, is severely impaired. Improved transit cannot replace this important road connection. In fact, as the region turns its attention to the recently proposed South/North LRT expansion, increased transit accessibility between Portland and Milwaukie will bring about higher densities and transit-supportive land uses which will magnify the importance of McLoughlin Boulevard and its connection to I-5.
3. The current connection from the Central Eastside to I-5 southbound is unworkable. Trucks from this industrial area of 18,000 employees congest Grand Avenue, King Boulevard, the Morrison Bridge, Front Avenue and the Ross Island Bridge ramps. Alleviating these problems areas and reducing McLoughlin Boulevard traffic on Grand Avenue and King Boulevard are surely critical to the continued strength and growth of the Central City.
4. If improvements to I-5 (such as those currently proposed) are implemented, there should be an expected useful life of 25 to 50 years in order to justify the expenditure in the short term. Any prospect of removing these improvements should recognize this limitation.
5. The transportation planners, implementers and policy-makers that make up JPACT and its committees generally agreed that a project to relocate I-5 and yet still serve the functions it now serves and would serve if the planned East Marquam projects were completed would cost significantly more than the currently proposed East Marquam projects alone. As you are aware, there is a substantial funding shortfall for both transit and highway improvements presently identified for the Portland region. A substantial increase in funding for the Eastbank Freeway would therefore be at the expense of other projects and would need to compete through the regional and state prioritization process like other projects.

Of particular concern is the significant regional effort required to continue the federal funding for the Westside Corridor LRT project, secure a federal funding commitment to extend this project to Hillsboro and the new effort which will be required to develop and implement a regional, state and federal funding commitment for the recently proposed South/North project to Clackamas and Clark Counties. Under the leadership of the City of Portland, the region has adopted an aggressive posture on accelerating implementation of the regional LRT system. These LRT projects are a very high priority of the region and the City of Portland and, if implemented, will likely play a more significant role in ensuring the continued strength and expansion of the Central City area than alternatives to the East Marquam - Phase III and IV projects.

6. If there is continued doubt about whether the East Marquam - Phase III and IV projects are built, numerous other projects are hindered in proceeding through the project development/design/EIS process. This project and the alternatives of relocation or removal that are presently under discussion would have significantly different effects on traffic circulation patterns and therefore further stall the region's ability to address problems on I-5 between the Fremont Bridge and the Banfield Freeway, on I-405 between I-5 and U.S. 26 and for crossings of the Willamette River and connections to the west end of the Ross Island Bridge.
7. This issue was thoroughly reviewed in 1989 and a conclusion was reached to not relocate or remove the Eastbank Freeway. That was an appropriate policy question to raise at that time, before major investment in the East Marquam project. At this point, decisions and commitments have been made and millions of dollars have been spent on the East Marquam - Phase I and II projects. It is time to move on and implement the Phase III and IV projects.

As the Portland City Council considers this project and its possible effects on the City of Portland, please take into consideration these regional effects and be prepared to integrate your interests with those of the region. In addition, please recognize that it is critical to maintain a strong regional consensus in order to successfully fund and implement needed transportation investments while meeting objectives related to development, air quality and vehicle miles of travel. We are willing to assist in addressing the long-term disposition of this issue through Metro's Region 2040 project and/or through the Future Vision called for by the new Metro Charter.



## METRO

Date: June 7, 1993  
 To: Bonnie Hays, FOCUS Chair  
 From: Andrew C. Cotugno, Planning Director  
 Re: Local Government Voluntary Dues for Metro Services

Since the local government dues are fully dedicated to meeting Metro's planning functions, I have been assigned the responsibility to answer questions raised in your April 21, 1993 letter from FOCUS and others that I understand have been raised.

The programs for which local government dues are reflected in the budget approved by the Metro Council on May 6 are as follows:

PROPOSED PROGRAM	TOTAL BUDGET	DUES BUDGET	DUES SHARE
1. RLIS/Database Maintenance	\$849,500	\$211,625	24.9%
2. Travel Surveys/Model Refinement	\$966,000	\$31,160	3.2%
3. Technical Assistance			
a. Data Resource Center	\$68,600	\$68,600	100%
b. Travel Forecasts	\$138,600	\$11,447	8%
4. RTP Update	\$365,000	\$61,166	\$16.8%
5. Transportation Demand Management	\$76,995	\$3,063	4.0%
6. Willamette Crossing Study	\$181,000	\$10,500	5.8%
7. Urban Arterial Fund	\$241,500	\$12,401	5.1%
8. Transportation Improvement Program	\$148,000	\$4,000	2.7%
9. Congestion Management Plan	\$109,000	\$1,000	0.9%
10. RTP Financial Plan	\$26,000	\$500	1.9%
11. TPAC/JPACT Coordination/Management	\$125,000	\$18,036	14.4%
12. Regional HCT Plan	\$262,630	\$4,065	1.5%
13. Region 2040	\$986,000	\$160,000	16.2%
TOTAL DUES		\$597,563	

A summary explanation of these programs follows:

1. RLIS/Database Maintenance - This is an ongoing effort to annually update population, employment, housing and commercial building permits, land use, tax lots, other demographic and economic data and forecasts and the Regional Land Information System (RLIS). It is essential input to many local, regional, state and private studies and provides an economical, central resource for all parties. The costs are shared by local governments through the dues, transportation grants, Metro's excise tax and solid waste funds to reflect the different users of the data.

This program simply ensures that the resource is up to date and available. The cost of using or retrieving the needed data for a particular user is paid for by the user. Those that help maintain the data only pay the cost of retrieval when accessing the data. Those that don't pay an add-on fee to the cost of retrieval to contribute toward this database.

2. Travel Surveys/Model Refinement - This is an ongoing effort to survey individual travel behavior in order to understand regionwide travel patterns and better forecast future travel growth. It is unusually large this year because we have major surveys planned of households, trucks, travel into and out of the region, transit ridership and highway speed and delay. This data is used to update Metro's travel-forecasting models for use by us and others. It is largely funded by grants with a small portion of match from local dues.

This task is particularly important in order to respond to new state and federal requirements to reduce air pollution and vehicle-miles-traveled. Current measuring and forecasting of these are weak.

3. Technical Assistance - This is an account provided to all dues-paying members of Metro to access Metro's two major databases: socio-economic/land use/RLIS data and travel forecasts. This budget is pro-rated into subaccounts for the major users (Portland, each county and its cities, Tri-Met, ODOT, and Port of Portland) and pays for Metro's staff and computer costs to provide these outside users access to Metro's database.

- a. Data Resource Center - This technical assistance account provides access to Metro's maps, land use, RLIS, aeri-als and socio-economic databases. It is fully supported by dues. Non-dues paying individuals, including the public, pay a fee.
  - b. Travel Forecasts - This technical assistance account provides access to Metro's short and long-range travel forecasts. This data is necessary for local transportation planning and design of transportation projects. It is substantially supported by transportation planning grants, but dues pay the local match. Major users of these forecasts (such as the Western Bypass Study and others) contract for services over and above this technical assistance account. Access to these forecasts is either directly from Metro or via remote terminals connected to Metro at each of the three counties, Portland, Tri-Met and ODOT. Non-dues paying individuals, including the public, pay a fee.
4. RTP Update - Over the next two years, this program will update the Regional Transportation Plan to meet new federal requirements promulgated through the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA) and new state requirements promulgated by LCDC through the administrative rule implementing Goal 12 - Transportation. If the region does not meet these requirements, federal sanctions could jeopardize federal transportation funding and state sanctions could result in an LCDC enforcement order. All local plans must be consistent with the revised RTP. This program is largely funded through grants with a share of the local match from dues.
  5. Transportation Demand Management - This program is a special subset of the RTP update focusing on reducing travel demand. It is apparent that some methods to reduce demand will be needed if we are to meet the goals set for reducing vehicle-miles-traveled (VMT) per capita by 20 percent. This program will examine options and recommend elements to include in the RTP update. It is largely grant-funded with a portion of the local match from dues.
  6. Willamette Crossing Study - This corridor study will focus on the Ross Island and Sellwood Bridges to determine future highway capacity needs. Like previous efforts focusing on the Southwest Corridor, the Northwest Corridor (Cornell/Burnside) and the Mt. Hood Parkway, it provides the means to examine options in greater detail with the results to be



included into the RTP. It is largely grant-funded with a portion of the local match from dues.

7. Urban Arterial Fund - This is an effort to determine whether Metro should refer a measure to the voters to establish a funding source for improvement to regionally significant arterials. The result of this effort will be to define the potential program of projects in order to allow regional and local decision-makers to determine whether and how to proceed. Local road, bike and pedestrian projects to be funded with this resource will be the component of this recommended program. This effort is largely funded with grants with a portion of the local match funded from dues.
8. Transportation Improvement Program - This program involves approving projects for receipt of any type of federal highway or transit funding, consistent with the RTP, applicable federal requirements and in conformance with air quality restrictions. This involves policy concerns dealing with prioritization and technical concerns dealing with specific federal requirements which may apply. This program is largely funded with grants with a portion of the match funded with dues.
9. Congestion Management Plan - This is a new ISTEA requirement to develop a system to monitor congestion levels and identify methods to address this congestion through a variety of construction, management or alternative mode techniques. The program is largely grant-funded with a small portion of the local match from dues.
10. RTP Financial Plan - This is a new ISTEA and Rule 12 requirement to have an RTP which is constrained by a realistic estimate of transportation resources, regardless of source (federal, state or local). It will require accounting for revenue sources and planned expenditures not normally addressed by Metro in the RTP (such as maintenance and local roads). The program is largely grant-funded with a portion of the local match from dues.
11. TPAC/JPACT Coordination and Management - This provides for administrative procedures related to receipt of transportation planning grants and efforts to effectively staff TPAC, JPACT and other local government coordinating committees. It is largely grant-funded with a portion of the match from dues.

12. Regional High-Capacity Transit Plan - This provides the funds necessary to address implementation of a regional high-capacity transit system not counting the budget for Westside LRT, the Hillsboro extension and South/North Alternatives Analysis (which are funded separately). It is largely grant-funded with a small portion of the local match from dues.
13. Region 2040 - This is a major long-range land use and transportation planning program to evaluate alternative urban growth forms for the region. It is the program by which Metro is addressing aspects of Rule 12 and the Urban Reserves requirement of LCDC as well as the new Metro Charter requirements to develop a Future Vision and Regional Framework Plan. It is mostly funded with the Metro excise tax with a portion of the budget from dues.

#### OTHER QUESTIONS RAISED

1. Effect on non-paying jurisdictions - Two programs are specifically budgeted to provide local governments "technical assistance" in accessing Metro's socio-economic, land use and travel databases and forecasts. This budget will be reduced commensurate with the amount of dues underpayment and those local governments will be charged a fee for service. Like the public, this fee will include Metro's direct cost to retrieve the data and an add-on to use toward database maintenance.

All the other programs must be carried out on a regional basis and the budget cannot be readily reduced. At the direction of JPACT, the Metro budget does not reflect underpayment of dues for these programs. JPACT has committed to revisiting the question of where these funds are obtained in the event local dues underpayment does occur. Since these programs involve a significant level of local government coordination, Metro's staff effort will prioritize coordination with dues-paying members.

Other effects on non-paying jurisdictions mentioned by JPACT include re-examination of membership on Metro's Advisory Committees (such as JPACT, TPAC, MPAC and RTAC) and reconsideration of eligibility to receive federal transit and highway funds for projects. These actions are not preferable from Metro's perspective but were raised by JPACT because of the concern that some jurisdictions are paying

dues to help support these functions which would therefore represent a subsidy of the non-paying jurisdictions.

2. Is Metro providing sufficient support from the excise tax? - During the past several years, the local government dues has been levied at 43¢ per capita. Prior to that, for a period of over 10 years, it was levied at 51¢ per capita. At 43¢, local dues has only increased as a particular local government's population has increased. During this same period, Metro's excise tax contribution has increased substantially. This is because the Metro Council and Executive Officer recognize the importance of addressing regional growth management issues and the obligation of Metro to fund aspects that are clearly regional in scope. A comparison is as follows:

	<u>Dues</u>	<u>Excise Tax</u>
FY 89-90	\$644,773	\$ 37,612
FY 90-91	555,149	1,086,846
% Change from previous year	-14%	+189%
FY 91-92	578,719	1,972,333
% Change from previous year	+ 4%	+ 81%
FY 92-93	581,157	1,917,600
% Change from previous year	+ 4%	- 3%
FY 93-94	597,563	2,175,237
% Change from previous year	+ 3%	+ 13%

3. Is the new Metro building unnecessarily increasing the cost for support services to the Planning Department?

Metro uses a "Cost Allocation Plan" to assign support service costs to each department based upon historical usage of each support service. Certain costs are based upon usage factors (such as square footage or number of accounting transactions); other costs are based upon labor (such as number of hours of graphics or legal services). The overall support service cost is allocated to each Planning Department project and funding source using an overall "overhead ate" as an additive to personnel costs on that project.

This is a federally accepted method and provides the means to charge the grants their fair share of overhead along with every other source of funds in the Department. During the past several years, this overhead rate has steadily dropped. The budgeted rate for FY 93-94, including the cost of the new Metro headquarters, reflects no change from the prior fiscal year and a steady decline over the past four years.

The trend is as follows:

	<u>Overhead Rate*</u>
FY 89-90 . . . . .	48%
FY 90-91 . . . . .	41%
FY 91-92 . . . . .	40%
FY 92-93 . . . . .	33%
FY 93-94 . . . . .	33%

\* Compiled as an added percentage to direct salary cost.

INTERGOVERNMENTAL AGREEMENTS

The two examples you provided as models for possible Metro/local government agreements do not serve the purpose for which these dues are being collected.

One example is a fee-for-service type contract much like a consulting contract. It provides for labor rates, designated staff, etc. The programs funded by the dues are regional planning efforts (as described above), not consulting assistance on local projects.

The second example is for local government membership in a COG. It provides for voting rights, committee composition, opt-out/opt-in procedures, etc. These organizational issues are generally dealt with through the Metro Charter which defines local government membership on MPAC and the committee's responsibilities and authorities relating to Metro's decisions.

A suitable substitute is attached. It is fairly simple and provides for:

1. Payment of dues by November 1, 1993 for the FY 93-94 budget year.
2. Metro's commitment to use the dues on the specified programs (the work scopes attached to this memo should be an attachment to the agreement).

Chairman Hays

June 7, 1993

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3. Metro's commitment to involve dues-paying local governments in these programs through TPAC, JPACT, RTAC and MPAC.

Staff recommends executing an agreement such as this subject to approval by the Metro Council. Such a model may also be appropriate for payment of voluntary dues to FOCUS.

ACC:lmk

Attachment: Draft IGA

## Intergovernmental Agreement

DRAFT

This Agreement is entered into between Metro, a metropolitan service district organized under the laws of the state of Oregon and the 1992 Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and [jurisdiction], a [city or county], \* \* \* , hereinafter called "local government."

### Recitals:

1. Local governments within Metro desire to continue support for Metro planning functions during fiscal year 1993-94 by voluntarily paying local government dues on the same basis as previously required by statute.
2. Metro desires to assure local governments of the allocation of dues to Metro planning functions to identify the services and products provided with dues assistance.

### Agreements:

1. Local government agrees to pay \$ \_\_\_\_\_ as its 1993-94 share of voluntary local government dues calculated by the same \$.43 per capital level utilized for 1992-93 by November 1, 1993.
2. Metro agrees that voluntary local government dues shall be allocated to those Metro planning activities indicated in Exhibit "A" attached. The total budget amount of local dues budgeted at full voluntary local dues received and the percentage of the total activity budget that full dues would fund is indicated on Exhibit "A." Nonpayment of voluntary dues by previously contributing local governments will reduce the amount of dues contribution and dues share.
3. Metro agrees to review any nonpayment of voluntary dues with JPACT to determine whether alternative sources of funds are available for the planning activities in Exhibit "A" and for any recommendations to encourage full voluntary dues payment.
4. Metro agrees to involve dues-paying local governments in the Metro planning activities listed in Exhibit "A" through TPAC, JPACT, RTAC, and MPAC.

**Exhibit A**

	<b>PROPOSED PROGRAM</b>	<b>TOTAL BUDGET</b>	<b>DUES BUDGET</b>	<b>DUES SHARE</b>
1.	RLIS/Database Maintenance	\$849,500	\$211,625	24.9%
2.	Travel Surveys/Model Refinement	\$966,000	\$31,160	3.2%
3.	Technical Assistance			
	a. Data Resource Center	\$68,600	\$68,600	100%
	b. Travel Forecasts	\$138,600	\$11,447	8%
4.	RTP Update	\$365,000	\$61,166	\$16.8%
5.	Transportation Demand Management	\$76,995	\$3,063	4.0%
6.	Willamette Crossing Study	\$181,000	\$10,500	5.8%
7.	Urban Arterial Fund	\$241,500	\$12,401	5.1%
8.	Transportation Improvement Program	\$148,000	\$4,000	2.7%
9.	Congestion Management Plan	\$109,000	\$1,000	0.9%
10.	RTP Financial Plan	\$26,000	\$500	1.9%
11.	TPAC/JPACT Coordination/Management	\$125,000	\$18,036	14.4%
12.	Regional HCT Plan	\$262,630	\$4,065	1.5%
13.	Region 2040	\$986,000	\$160,000	16.2%
	<b>TOTAL DUES</b>		<b>\$597,563</b>	

1. RLIS/Database Maintenance - This is an ongoing effort to annually update population, employment, housing and commercial building permits, land use, tax lots, other demographic and economic data and forecasts and the Regional Land Information System (RLIS). It is essential input to many local, regional, state and private studies and provides an economical, central resource for all parties. The costs are shared by local governments through the dues, transportation grants, Metro's excise tax and solid waste funds to reflect the different users of the data.

This program simply ensures that the resource is up to date and available. The cost of using or retrieving the needed data for a particular user is paid for by the user. Those that help maintain the data only pay the cost of retrieval when accessing the

data. Those that don't pay an add-on fee to the cost of retrieval to contribute toward this database.

2. **Travel Surveys/Model Refinement** - This is an ongoing effort to survey individual travel behavior in order to understand regionwide travel patterns and better forecast future travel growth. It is unusually large this year because we have major surveys planned of households, trucks, travel into and out of the region, transit ridership and highway speed and delay. This data is used to update Metro's travel-fore-casting models for use by us and others. It is largely funded by grants with a small portion of match from local dues.

This task is particularly important in order to respond to new state and federal requirements to reduce air pollution and vehicle-miles-traveled. Current measuring and fore- casting of these are weak.

3. **Technical Assistance** - This is an account provided to all dues-paying members of Metro to access Metro's two major databases: socio-economic/land use/RLIS data and travel forecasts. This budget is pro-rated into subaccounts for the major users (Portland, each county and its cities, Tri-Met, ODOT, and Port of Portland) and pays for Metro's staff and computer costs to provide these outside users access to Metro's database.
  - a. **Data Resource Center** - This technical assistance account provides access to Metro's maps, land use, RLIS, aeriels and socio-economic databases. It is fully supported by dues. Non-dues paying individuals, including the public, pay a fee.
  - b. **Travel Forecasts** - This technical assistance account provides access to Metro's short and long-range travel forecasts. This data is necessary for local transportation planning and design of transportation projects. It is substantially supported by transportation planning grants, but dues pay the local match. Major users of these forecasts (such as the Western Bypass Study and others) contract for services over and above this technical assistance account. Access to these forecasts is either directly from Metro or via remote terminals connected to Metro at each of the three counties, Port- land, Tri-Met and ODOT. Non-dues paying individuals, including the public, pay a fee.
4. **RTP Update** - Over the next two years, this program will update the Regional Transportation Plan to meet new federal requirements promulgated through the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA) and new state requirements promulgated by LCDC through the administrative rule implementing Goal 12 - Transportation. If the region does not meet these requirements, federal sanctions could jeopardize federal transportation funding and state sanc- tions could result in an LCDC enforcement order. All local plans must be consistent with the



revised RTP. This program is largely funded through grants with a share of the local match from dues.

5. Transportation Demand Management - This program is a special subset of the RTP update focusing on reducing travel demand. It is apparent that some methods to reduce demand will be needed if we are to meet the goals set for reducing vehicle-miles-traveled (VMT) per capita by 20 percent. This program will examine options and recommend elements to include in the RTP update. It is largely grant-funded with a portion of the local match from dues.
6. Willamette Crossing Study - This corridor study will focus on the Ross Island and Sellwood Bridges to determine future highway capacity needs. Like previous efforts focusing on the Southwest Corridor, the Northwest Corridor (Cornell/ Burnside) and the Mt. Hood Parkway, it provides the means to examine options in greater detail with the results to be included into the RTP. It is largely grant-funded with a portion of the local match from dues.
7. Urban Arterial Fund - This is an effort to determine whether Metro should refer a measure to the voters to establish a funding source for improvement to regionally significant arterials. The result of this effort will be to define the potential program of projects in order to allow regional and local decision-makers to determine whether and how to proceed. Local road, bike and pedestrian projects to be funded with this resource will be the component of this recommended program. This effort is largely funded with grants with a portion of the local match funded from dues.
8. Transportation Improvement Program - This program involves approving projects for receipt of any type of federal highway or transit funding, consistent with the RTP, applicable federal requirements and in conformance with air quality restrictions. This involves policy concerns dealing with prioritization and technical concerns dealing with specific federal requirements which may apply. This program is largely funded with grants with a portion of the match funded with dues.
9. Congestion Management Plan - This is a new ISTEA requirement to develop a system to monitor congestion levels and identify methods to address this congestion through a variety of construction, management or alternative mode techniques. The program is largely grant-funded with a small portion of the local match from dues.
10. RTP Financial Plan - This is a new ISTEA and Rule 12 requirement to have an RTP which is constrained by a realistic estimate of transportation resources, regardless of source (federal, state or local). It will require accounting for revenue sources and planned expenditures not normally addressed by Metro in the RTP (such as maintenance and local roads). The program is largely grant-funded with a portion of the local match from dues.

11. TPAC/JPACT Coordination and Management - This provides for administrative procedures related to receipt of transportation planning grants and efforts to effectively staff TPAC, JPACT and other local government coordinating committees. It is largely grant-funded with a portion of the match from dues.
12. Regional High-Capacity Transit Plan - This provides the funds necessary to address implementation of a regional high-capacity transit system not counting the budget for Westside LRT, the Hillsboro extension and South/North Alternatives Analysis (which are funded separately). It is largely grant-funded with a small portion of the local match from dues.
13. Region 2040 - This is a major long-range land use and transportation planning program to evaluate alternative urban growth forms for the region. It is the program by which Metro is addressing aspects of Rule 12 and the Urban Reserves requirement of LCDC as well as the new Metro Charter requirements to develop a Future Vision and Regional Framework Plan. It is mostly funded with the Metro excise tax with a portion of the budget from dues.

COMMITTEE MEETING TITLE

✓ PACT

DATE

6-10-93 (7:30am)

NAME

AFFILIATION

NAME	AFFILIATION
✓ Earl Blumenauer	City of Portland
Andy Coburn	Metro
✓ George Dan Baspen	Metro
Ken Anna	"
✓ David Lehman	Port of Portland
✓ <del>David Lehman</del>	Clackamas Co.
✓ Les White	C-Town
✓ Roy Rogers	WASHINGTON Co.
✓ Gerry Smith	WSDOT
✓ Gary Hanson	MULTI CO
✓ Roger Buchanan	Metro Council
✓ Rod Monroe	Metro Council (At-Large)
✓ ROB DRAKE	WASHINGTON CO. CITIES
✓ CRAIG Lomnicki	CITIES OF CLACKAMAS Co.
✓ BERNIE GIUSTO	CITIES OF MULTNOMAH Co.
✓ Steve Greenwood	DEQ
✓ KYLE WARNER	ODOT
Richard Bral	Metro
✓ TOM WALSH	Tri-Met
MARK BROWN	WASH. CO.
GB ARRINGTON	TRI-MET
KATHY BUSSE	MULT CO.
Howard Harris	DEQ

COMMITTEE MEETING TITLE

JPACT

DATE

6-10-93

NAME

AFFILIATION

STEVE DOTTERER

CITY OF PORTLAND

Sean Lockingbill

RTC

Keith Ahola

WSDOT

Mary Haggerty

WSDOT

Ted Spence

DLED

Robin McArthur Phillips

ODOT

JOHN KELLY

DLED

DAVE BISHOP

ODOT - SALEM

GORDON OLIVER

OREGONIAN