

## STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 93-1784 FOR THE PURPOSE OF RECOMMENDING PRIORITY HIGH-CAPACITY TRANSIT CORRIDORS TO THE SOUTH AND NORTH AND AN ACTION PLAN FOR PHASE 2 OF THE SOUTH/NORTH PRELIMINARY ALTERNATIVES ANALYSES

Date: March 23, 1993

Presented by: Andrew Cotugno

### PROPOSED ACTION

This resolution designates certain High-Capacity Transit (HCT) corridor segments as priorities for future study and provides policy direction to project staff regarding preparation for Alternatives Analyses and funding plan.

### FACTUAL BACKGROUND AND ANALYSIS

The FY 1993 Unified Work Program identified Preliminary Alternatives Analyses for HCT corridors terminating in Clackamas County and in Clark County, Washington. This work was planned in accordance with Metro Resolution 90-1300 which designated Clackamas County as the next regional priority to receive HCT improvements and Metro/RTC joint resolutions 91-1456 and 92-1549 which established a strategy for integrating the study process for the South and North corridors and provided an oversight structure for the studies.

A Project Management Group (PMG), composed of senior transportation staff from the participating governments and agencies, was formed to oversee the study process. The PMG approved a Work Plan, appointed a Citizen Advisory Committee and Expert Review Panel and reviewed and approved data developed by technical staff.

Four potential corridor segments were identified in the Regional Transportation Plan that serve Clackamas and Clark Counties: the Milwaukie and I-205 segments to the south and the I-5 and I-205 segments to the north. Technical staff developed data on nine subject areas related to the performance and impact of high-capacity transit in each of the corridors (Exhibit A).

The data developed by technical staff was first reviewed by an Expert Review Panel, a group of technical experts from both within the region and throughout the country. The panel recommended modifications and found the data was accurate and adequate for the purposes of local decision-making.

This data was then reviewed by the Project Management Group, the Citizen Advisory Committee and by the general public in several public forums. A summary of correspondence received from the public is attached as Exhibit C. The Citizen Advisory Committee and the Project Management Group made several recommendations regarding further study of High-Capacity Transit in each of the corridors. These recommendations include:

- (1) Select Milwaukie as the priority corridor segment for further analysis of High-Capacity Transit options between Portland and Clackamas County.
- (2) Select I-5 North as the priority corridor segment for further analysis of High-Capacity Transit options between Portland and Clark County.
- (3) Seek to prepare an Alternatives Analysis/Draft Environmental Impact Statement and secure financing on a single South/North HCT corridor incorporating both the Milwaukie and I-5 segments.
- (4) Continue to analyze the design and possible funding sources for constructing and operating an HCT corridor to the Portland International Airport as a non-priority corridor.
- (5) Prepare intermediate-term improvement strategies for the I-205 South and North corridors which do not include HCT improvements.

The Citizen Advisory Committee further clarified that if both the South and North HCT priority corridor segments are not able to be developed as a single corridor, the South Corridor segment HCT improvement terminating in Clackamas County should advance first as the next regional HCT priority corridor in accordance with Metro Resolution No. 90-1300 and the Metro/RTC joint Resolution No. 91-1456.

#### EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 93-1784.

TL:lmk:bc  
93-1784.RE2  
3-31-93

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF RECOMMENDING ) Introduced by  
PRIORITY HIGH CAPACITY TRANSIT )  
CORRIDORS TO THE SOUTH AND NORTH) Councilor Van Bergen  
AND AN ACTION PLAN FOR PHASE 2 )  
OF THE SOUTH/NORTH PRELIMINARY )  
ALTERNATIVES ANALYSIS )

WHEREAS, The FY 1992 regional work program for transportation included South/North Preliminary Alternatives Analyses, conducted in accordance with Federal Transit Administration guidelines; and

WHEREAS, The Preliminary Alternatives Analyses were conducted through a cooperative Metro/Southwest Washington Regional Transportation Council (RTC) process and were coordinated through JPACT and JRPC; and

WHEREAS, The primary purpose of the Preliminary Alternatives Analyses is to evaluate and recommend the priority corridor in the South Study Area (Portland to Clackamas County) and the priority corridor in the North Study Area (Portland to Clark County) wherein the priority corridor designation means that: 1) it has been locally determined that further and more detailed analyses of high-capacity transit (HCT) options in the corridor area will occur next, and 2) the corridor is locally determined to be the priority corridor for Federal Transit Administration (FTA) HCT funds (Section 3 New Start funds) in the study area it serves; and

WHEREAS, Metro Resolution No. 90-1300 reaffirmed the commitment to an East Portland/Clackamas County project as the region's next priority following the Westside/Hillsboro Corridor project; and

WHEREAS, Metro Resolution No. 91-1456 adopted as regional policy a commitment to perform the Preliminary Alternatives Analysis Study to determine if it is feasible to proceed with a larger corridor from Clackamas County to Clark County; and

WHEREAS, An Expert Review Panel, composed of national experts in HCT analyses, has reviewed the technical data produced during the Preliminary Alternatives Analyses and found the data to be valid and appropriate for the decisions at hand; and

WHEREAS, A Citizens Advisory Committee, composed of residents and business people from the affected corridors, and the Project Management Group, composed of transportation officials from the affected governments, have reviewed and adopted the attached findings and recommendations (Exhibit A); now, therefore,

BE IT RESOLVED,

That the Metro Council adopts as regional policy:

1. The single South/North corridor from Clackamas County, Oregon through the Portland CBD to Vancouver, Washington as the region's next priority for high capacity transit improvements following the Westside/Hillsboro project; and

a. The Milwaukie segment is the priority for further analysis of High-Capacity Transit options between Portland and Clackamas County.

b. The I-5 North segment is the priority for further analysis of High-Capacity Transit options between Portland and Clark County.

2. Metro staff, in cooperation with other affected agency and jurisdictional staff, is directed to refine and analyze alignment, station and terminus options in the Milwaukie segment and I-5 North

segment as part of Phase 2 of the Preliminary Alternatives Analysis and recommend a small set of the most promising alternatives for Alternatives Analyses and preparation of a Draft Environmental Impact Statement.

3. Metro staff, in cooperation with other affected agency and jurisdictional staff, is directed to prepare intermediate-term improvement strategies for the I-205 South and North corridors (Oregon City to Clark County) which do not include HCT improvements.

4. Metro staff, in cooperation with other affected agency and jurisdictional staff, is directed to analyze the design and possible funding sources for constructing and operating an HCT corridor to the Portland International Airport as a non-priority corridor and recommend, if appropriate, how to proceed with an Airport Corridor HCT project.

5. Metro staff, in cooperation with other affected agency and jurisdictional staff, is directed to pursue the attached Action Plan to prepare for Alternatives Analysis and a Funding Plan for the South/North Corridor (Exhibit B)

ADOPTED by the Metro Council this 22nd day of April, 1993.

Judy Wyers, Presiding Officer

TL:lmk:bc  
93-1784.RE2  
3-31-93

# **The North/South Transit Corridor Study**

## **Priority Corridor Analysis: Findings And Recommendations**

**DRAFT FOR PUBLIC REVIEW**

**Task Manager:** Metro  
**Consultant:** Steven M. Siegel & Associates

**Contributing Agencies:** Metro  
In cooperation with:  
City of Milwaukie  
City of Portland  
City of Vancouver  
Clackamas County  
Clark County  
C-TRAN  
Multnomah County  
Oregon Dept. of Transportation  
Port of Portland  
Regional Transportation Council  
Tri-Met  
Washington State Dept. of Transportation

"The preparation of this report was financed in part by the U.S. Department of Transportation, Federal Transit Administration and by the Washington State Department of Transportation. The opinions, findings and conclusions expressed in this report are not necessarily those of the Federal Transit Administration or the Washington State Department of Transportation."

**PRIORITY CORRIDOR ANALYSIS:  
FINDINGS AND RECOMMENDATIONS**

**I. PURPOSE OF THE ANALYSIS**

- [a] The primary purpose of this report is to evaluate and recommend a priority segment for further study, in the South Study Area and in the North Study Area. The priority segment designation has two implications:
- [i] It has been locally determined that further and more detailed analyses of High Capacity Transit [HCT] options in the corridor segments are warranted, and
  - [ii] The corridor segment is locally determined to be part of the priority corridor for Federal Transit Administration [FTA] High Capacity Transit funds [Section 3 New Start funds] in the Study Area it serves.
- [b] Improvement strategies will also be prepared for those corridor segments which are not selected as part of the priority corridor. These "non-priority corridor" improvement strategies may include further consideration of HCT options. However, such analyses would be prepared without FTA involvement and, therefore, any resulting project would not be eligible for FTA funds [unless Alternatives Analysis/Draft Environmental Impact Statement [AA/DEIS] activities were later undertaken by a subsequent action to this determination of priority corridors].
- [c] A second purpose of this report is to define the relationship between the priority corridor segments for the North and South Study Areas. Specifically, the report evaluates and recommends whether the South priority corridor segment should proceed into the AA/DEIS and funding stages ahead of the North priority corridor segment, as currently prescribed by adopted regional policy, or if the two priority corridors should proceed concurrently.
- [d] While data is shown for shorter alignment options, the issue at hand is not the selection of a terminus. The data for the terminus options is shown to demonstrate that the conclusions being drawn are independent of the ultimate selection of a terminus.

**II. SOUTH STUDY AREA RECOMMENDATION**

- [a] Based on the findings summarized in Table ES-1, the Milwaukie corridor segment is recommended to be the priority corridor segment in the South Study Area for further study.

- [b] Staff is directed to refine and analyze alignment, station and terminus options in the Milwaukie corridor segment as part of Phase II of the Preliminary Alternatives Analysis and return to JPACT with a recommendation on a small set of promising options for Alternatives Analysis and preparation of a Draft Environmental Impact Statement.
- [c] It is recommended that the Airport segment, which runs along I-205 between the Gateway Transit Center and Portland International Airport, be uncoupled from the I-205 South segment and further analyzed as set forth in Section IV, below.

### **III. NORTH STUDY AREA RECOMMENDATION**

- [a] Based on the findings summarized in Table ES-2, the I-5 North corridor segment is recommended to be the priority corridor segment in the North Study Area for further study.
- [b] Staff is directed to refine and analyze alignment, station and terminus options in the I-5 North corridor segment as part of Phase II of the Preliminary Alternatives Analysis and return to JPACT with a recommendation on a small set of promising options for Alternatives Analysis and preparation of a Draft Environmental Impact Statement.

### **IV. AIRPORT STUDY AREA RECOMMENDATION**

- [a] Based on the findings summarized in Table ES-3, it is recommended that staff analyze the design and possible funding sources for constructing and operating an HCT corridor to the Portland International Airport, as a non-priority corridor.
- [b] Staff is directed to return to JPACT, at the conclusion of Phase II of the Preliminary Alternatives Analysis, with a recommendation on whether and, if applicable, how to proceed with an Airport Corridor HCT project.

### **V. RECOMMENDATION ON NON-PRIORITY CORRIDORS**

- [a] Staff is directed to prepare an intermediate-term improvement strategy for the I-205 South corridor segment and I-205 North [into Clark County] corridor segment which do not include HCT improvements.

### **VI. RECOMMENDED ACTION PLAN**

Based on the findings summarized in Table ES-4, the following Action Plan is recommended:

- [a] Seek to prepare Alternatives Analysis and a Draft Environmental Impact Statement on alternatives in the Milwaukie/I-5 North HCT corridor.
  1. Request assistance from the Oregon and Washington congressional delegations to

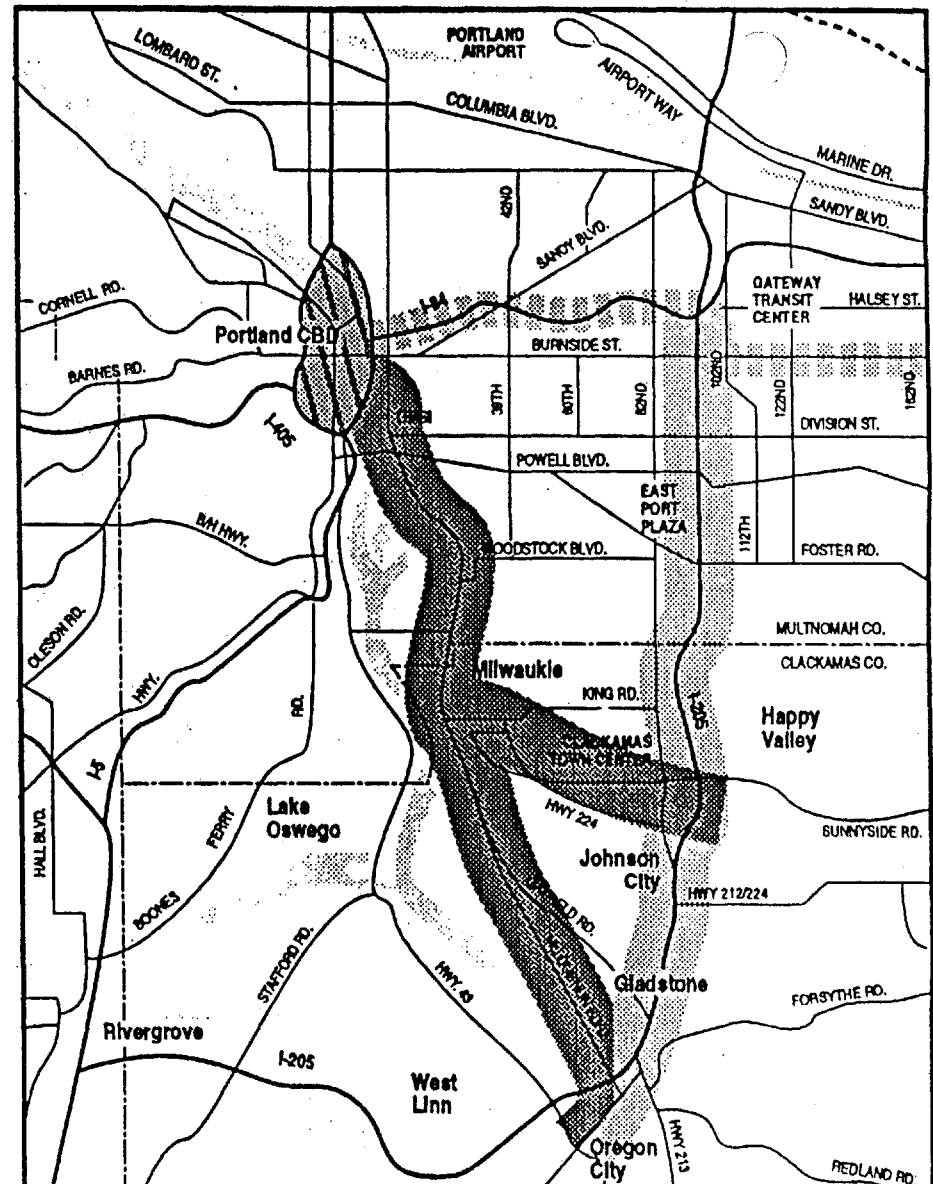
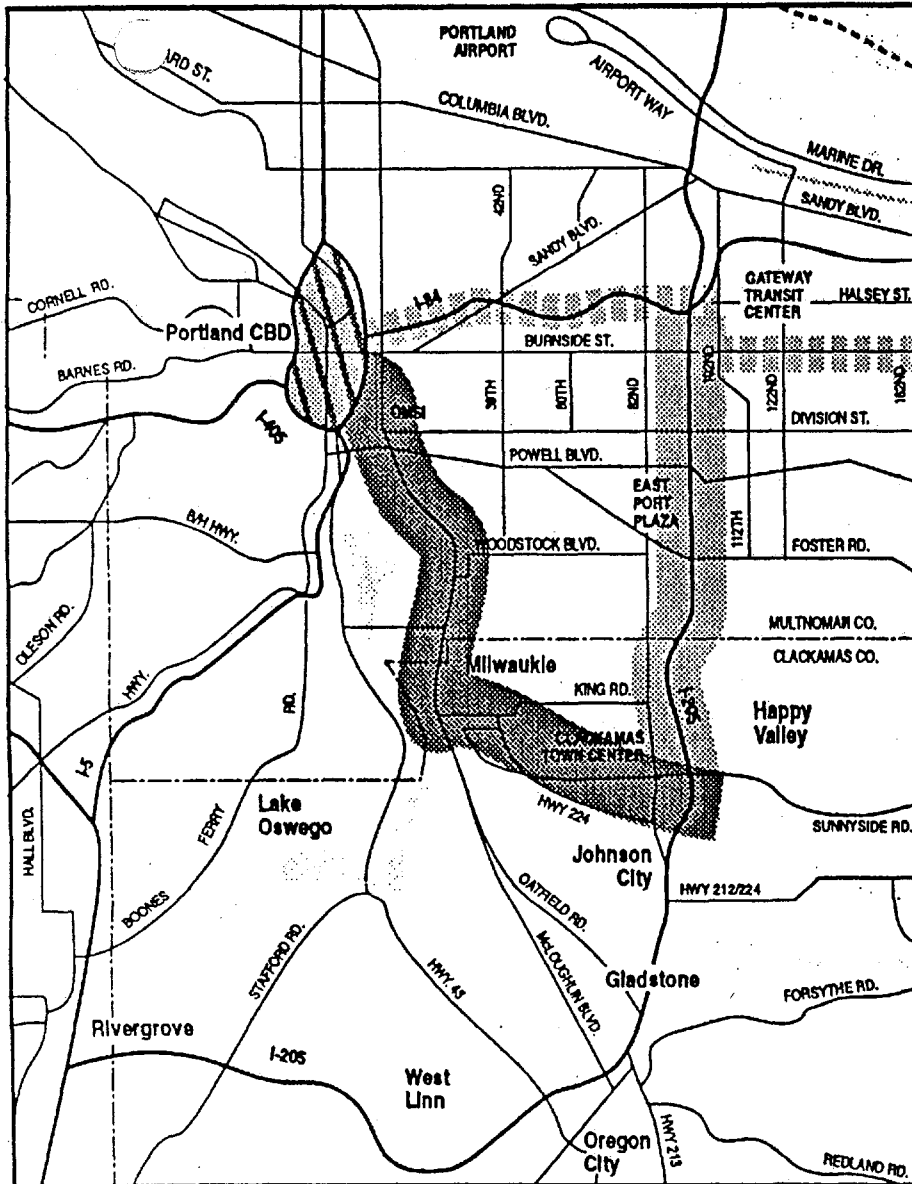


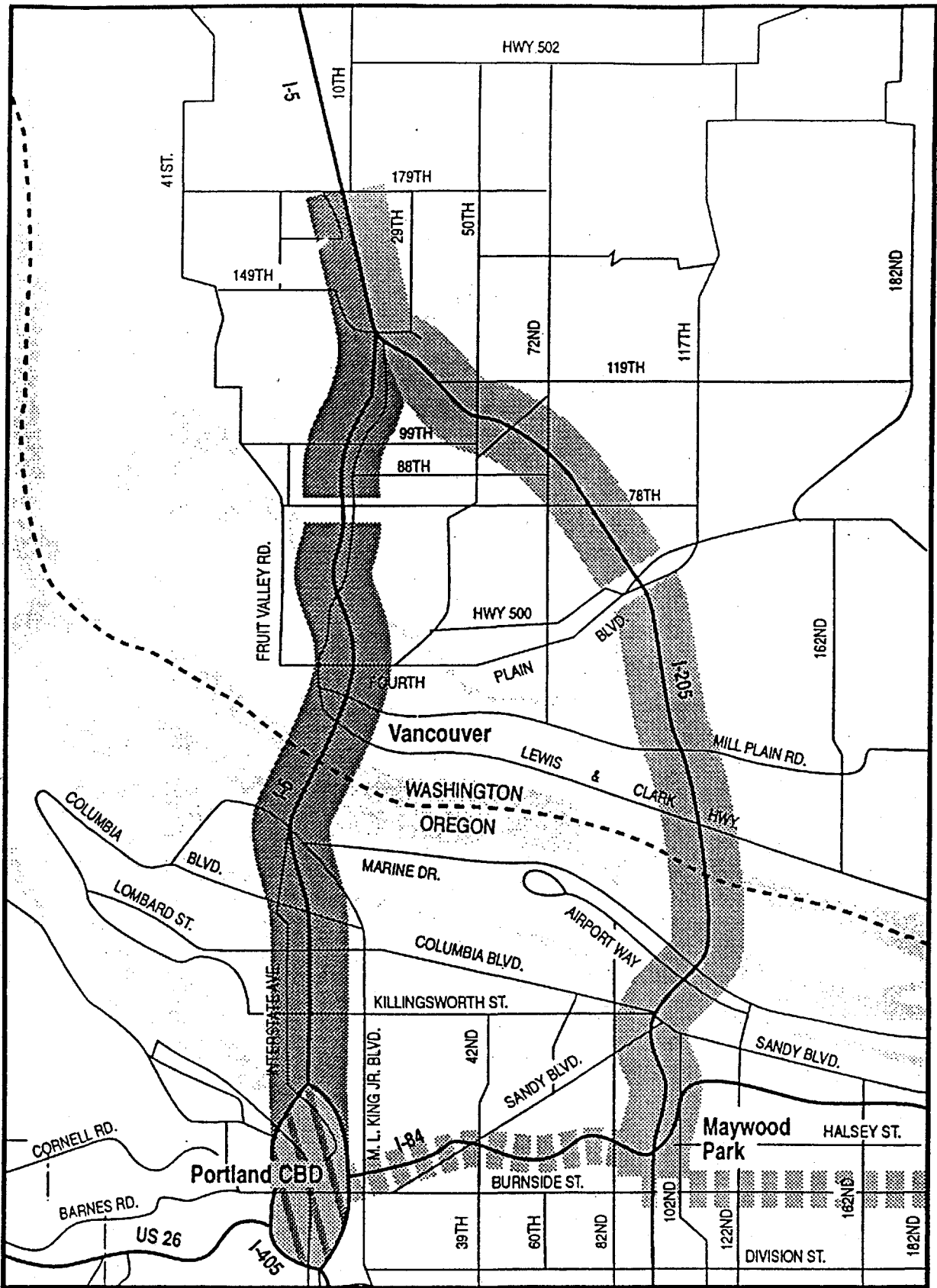
include a provision in the FY 1994 federal Appropriations Bill to permit the preparation of AA/DEIS work in a single corridors.

**[b]** Seek to secure financing for an HCT alternative in a single Milwaukie/I-5 North corridor.




1. Take all steps necessary to seek the maximum practical authorization of Section 3 New Start funds for a South/North corridor in the upcoming federal transportation authorization bill. The actual amount of federal funds, matching ratio and distribution of federal funds between corridors is to be determined on the basis of further technical, financial and political analyses.
2. The acquisition of federal authorization for a South/North corridor must be done in the context of first/concurrently completing the funding for the Westside LRT and the Hillsboro Extension.
3. Since the possibility exists that a federal transportation authorization bill could occur as early as federal FY 1995, regional funding activities, including the approval of state and local funding sources in both Washington and Oregon, should be completed prior to this date.
4. The development and implementation of a funding package for the South/North corridor should be done in the context of funding the long-term HCT system.

**[c]** In addition to seeking the capital funds for a South/North HCT project, the region should take all steps necessary to secure sufficient funds to operate a North/South HCT project and related bus feeder system.

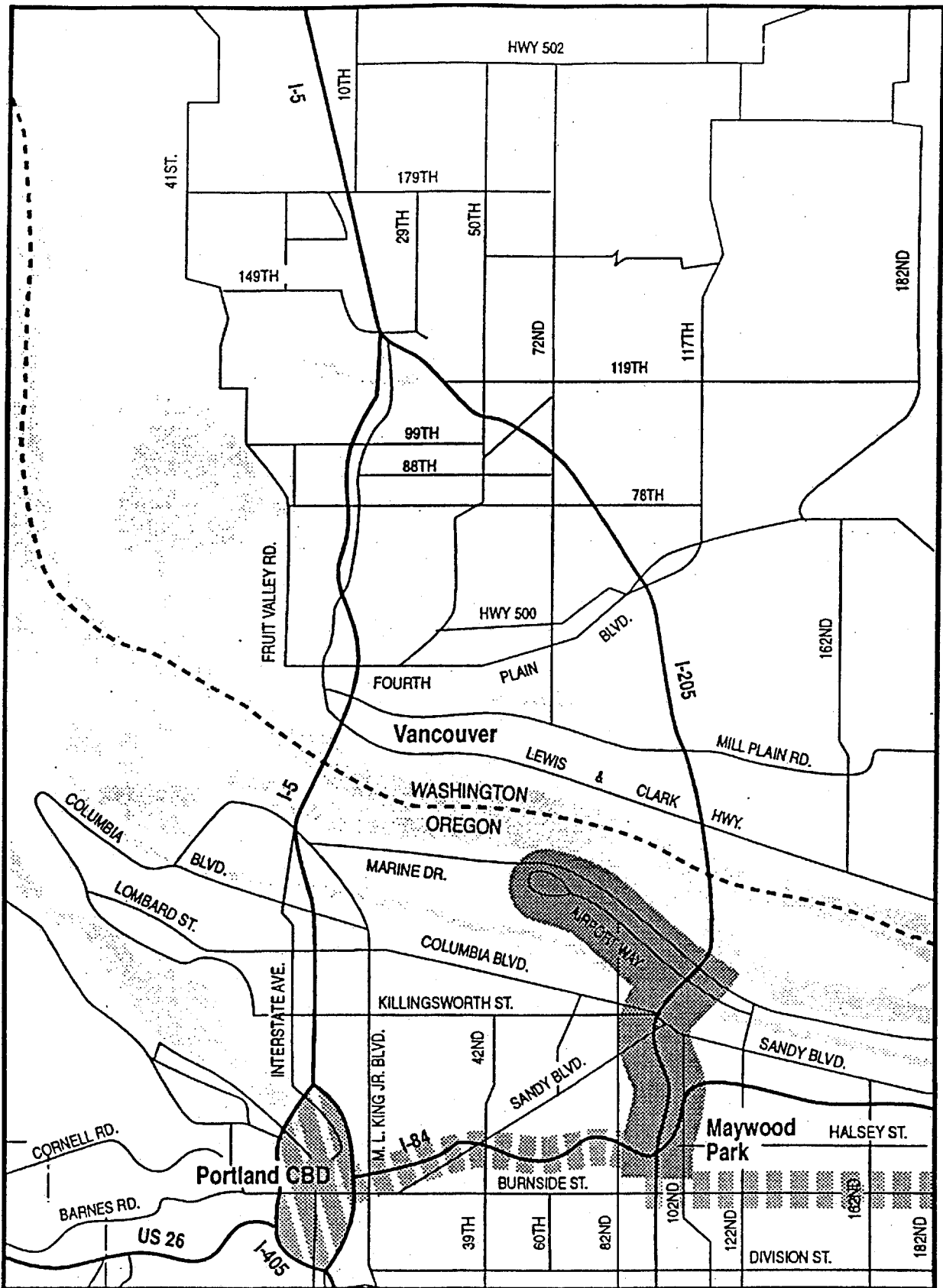






**North/South Transit Corridor Study: North Study Area**

-  = I-5 North corridor
-  = I-205 North corridor
-  = existing light rail





**North/South Transit Corridor Study: North Study Area**

-  = Airport High Capacity Transit study area
-  = existing light rail



**METRO**

**TABLE ES-1  
SOUTH STUDY AREA FINDINGS**

**Population and Employment**

1. The Milwaukie Corridor contains more existing and year 2010 population and employment than the I-205 South Corridor.
2. The Milwaukie Corridor, due to its longer length, contains more developable and redevelopable land than the I-205 South Corridor.

**Traffic and Transit Ridership**

3. McLoughlin Boulevard is currently and will continue to be more congested than I-205. All of the representative highway segments analyzed on McLoughlin Boulevard are at Level of Service E, or worse, while all of the representative segments on I-205 are well below capacity.
4. The Milwaukie Corridor is projected to attract over twice as many HCT daily riders, in the year 2010, as the I-205 South Corridor.
5. P.M. peak-hour, peak direction riders in the Milwaukie Corridor are projected to be 2.3 - 5.0 [depending on the location] times greater, in the year 2010, than in the I-205 South Corridor.

**Environmental Sensitivity**

6. In overall terms, the Milwaukie Corridor has a greater potential for environmental risks than does the I-205 South Corridor.

**Equity**

7. The Milwaukie Corridor serves a larger population of minority, poor, youth and elderly than does the I-205 South Corridor.

**Operating Costs and Efficiencies**

8. The Milwaukie Corridor is projected to exhibit almost twice the Farebox Recovery Rate of that in the I-205 South Corridor.
9. The Milwaukie Corridor provides greater long-term HCT capacity than does the I-205 South Corridor.

**Capital Costs**

10. The capital cost of the full-length [Clackamas Town Center and Oregon City] system is 22 percent higher in the Milwaukie Corridor than in the I-205 South Corridor. For the \$157 million premium, the Milwaukie Corridor serves Milwaukie directly while the I-205 South Corridor does not.

**Cost Effectiveness**

11. The total annualized cost-per-HCT rider in the Milwaukie Corridor is almost 60 percent better than in the I-205 South Corridor.

**Public Opinion**

12. Correspondence received during and following an extensive public review process supported the selection of the Milwaukie Corridor as the priority HCT corridor to Clackamas County.

**TABLE ES-1 (b)  
SUMMARY STATISTICS FOR THE SOUTH CORRIDOR**

<b>FACTOR/TERMINUS OPTION</b>	<b>MILWAUKIE CORRIDOR</b>	<b>I-205 SOUTH CORRIDOR</b>
<b>NUMBER OF HOUSEHOLDS [2010]</b>		
Full <sup>1</sup>	31,300	21,200
Short <sup>2</sup>	23,600	14,100
<b>CORRIDOR EMPLOYMENT [2010]</b>		
Full	65,800	50,900
Short	58,200	30,600
<b>CORRIDOR CONGESTION: 2010-NO BUILD PEAK HOUR V/C RATIOS IN CORRIDOR</b>	0.91 - 1.40	0.54 - 0.88
<b>CORRIDOR HCT RIDERSHIP [2010]</b>		
Full	19,100	9,500
Short	16,800	6,700
<b>CAPITAL COST: WITH DOWNTOWN IMPVTS. \$1993, Millions</b>		
Full	\$ 864	\$ 707
Short	\$ 599	\$ 467
<b>NET ANNUAL OPERATING COST [2010]</b>		
Full	\$ 6.51	\$ 7.33
Short	\$ 3.95	\$ 3.63
<b>FAREBOX RECOVERY RATIO [2010]</b>		
Full	29.4%	15.5%
Short	39.1%	20.7%
<b>COST-EFFECTIVENESS<sup>3</sup></b>		
Full	\$13.21	\$30.41
Short	\$10.35	\$25.73

<sup>1</sup> HCT line between Downtown Portland, Clackamas Town Center and Oregon City

<sup>2</sup> HCT line between Downtown Portland and Clackamas Town Center

<sup>3</sup> A local cost effectiveness measure was used in this analysis

**TABLE ES-2  
NORTH STUDY AREA FINDINGS**

Population and Employment

1. The I-5 North Corridor contains more existing and year 2010 population and employment than the I-205 North Corridor.
2. The I-205 North Corridor contains more developable and redevelopable land than the I-5 North Corridor.

Traffic and Transit Ridership

3. I-5 is currently and will continue to be more congested than I-205. By the year 2010, almost all of the representative highway segments analyzed on I-5 are approaching or exceeding Level of Service [LOS] E, while almost all of the representative segments on I-205 are at LOS D or better.
4. The I-5 North Corridor is projected to attract twice as many HCT daily riders, in the year 2010, as the I-205 North Corridor.
5. Year 2010 p.m. peak-hour, peak direction riders in the I-5 North Corridor are projected to be 85 percent more than in the I-205 North Corridor.

Environmental Sensitivity

6. In overall terms, the I-5 North Corridor has a greater number of environmentally sensitive sites than the I-205 North Corridor, although the I-205 North Corridor has greater ecosystem risks.

Equity

7. The I-5 North Corridor serves a larger population of minority, poor and elderly than does the I-205 North Corridor. The amount of "youth" in both full-length corridors is roughly the same.

Operating Costs and Efficiencies

8. LRT in the I-5 North Corridor is projected to exhibit a 10 percent better Farebox Recovery Rate than a Busway in the I-205 North Corridor.
9. The I-5 North Corridor provides greater long-term HCT capacity than does the I-205 North Corridor.

Capital Costs

10. The capital cost of the full-length I-5 North LRT is substantially higher than the I-205 North Busway. This difference is due to the different mode assumed for the I-205 North Corridor, not the location, configuration or characteristics of the corridor itself.

Cost Effectiveness

11. In spite of its higher capital cost, the total annualized cost-per-HCT rider in the full-length I-5 North Corridor is almost 20 percent less than in the I-205 North Corridor. The difference is even greater with a North Vancouver terminus option.

Public Opinion

12. Correspondence received during and following an extensive public review process supported the selection of the I-5 North Corridor as the priority HCT corridor to Clark County.

**TABLE ES-2 (b)**  
**SUMMARY STATISTICS FOR THE NORTH CORRIDOR**

<b>FACTOR/TERMINUS OPTION</b>	<b>I-5 NORTH CORRIDOR</b>	<b>I-205 NORTH CORRIDOR</b>
<b>NUMBER OF HOUSEHOLDS [2010]</b>		
Full <sup>1</sup>	35,700	33,000
Short <sup>2</sup>	24,900	19,200
<b>CORRIDOR EMPLOYMENT [2010]</b>		
Full	74,400	30,700
Short	67,700	23,000
<b>CORRIDOR CONGESTION: 2010 NO-BUILD PEAK HOUR V/C RATIOS IN CORRIDOR</b>	0.77 - 1.21	0.69 - 0.85
<b>CORRIDOR HCT RIDERSHIP [2010]</b>		
Full	21,800	10,900
Short	19,300	9,300
<b>CAPITAL COST: WITH DOWNTOWN IMPVTS. \$1993, Millions</b>	<b>LRT</b>	<b>BUSWAY</b>
Full	\$ 914	\$ 383
Short	\$ 709	\$ 288
<b>NET ANNUAL OPERATING COST [2010]</b>	<b>LRT</b>	<b>BUSWAY</b>
Full	\$ 7.00	\$ 4.13
Short	\$ 4.33	\$ 3.64
<b>FAREBOX RECOVERY RATIO [2010]</b>		
Full	31 %	27 %
Short	39 %	27 %
<b>COST-EFFECTIVENESS</b>		
Full	\$10.82	\$13.28
Short	\$ 8.02	\$11.35

<sup>1</sup> HCT line between Downtown Portland and 179th Street in Clark County

<sup>2</sup> HCT line between Downtown Portland and North Vancouver [78th Street/Vancouver Mall]



**TABLE ES-3  
AIRPORT STUDY AREA FINDINGS**

Population and Employment

1. Under the Metro forecasts, year 2010 employment in the Airport Study Area is projected to be 22,600. PDX and PIC combined represent about 9,500 employees. The forecasted employment is lower than the other Study Areas, this Area is smaller and much more concentrated.
2. The Port of Portland, based on the Master Plans for the Portland International Center and the Airport, forecasts that year 2012 employment at PDX and PIC will be about 18,400, almost twice the amount in the Metro forecasts.
3. PDX is a unique trip attractor in that the major reason for considering an HCT connection to PDX is to serve passenger trips, not work trips. The PDX Master Plan projected the number of annual passengers to grow from about 8 million today to about 16 million in the year 2012 [35,500/day].

Traffic and Transit Ridership

4. The level of service on I-205 in the Airport Study Area is currently at acceptable levels, and expected to generally remain below capacity.
5. Using the Metro model, year 2010 daily HCT ridership in the Airport Study Area is forecasted to be about 4,600, lower than in the other Study Areas. A 1988 study by Peat Marwick found that transit mode splits to airports in the U.S. with a rail connection ranged between 4 and 15 percent. Using the high end of the range found by Peat Marwick and the Port of Portland employment and passenger projections, the number of transit riders in the Airport Study Area would be almost twice that projected by the Metro model.

Environmental Sensitivity/Equity

6. The environmental risks are low.
7. Because the Airport Study Area does not have a large population base, there are relatively small amounts of "disadvantaged" and "transit dependent" sub-groups in the Study Area.

Operating Costs and Efficiency/Capital Cost

8. The Net Annual HCT Operating Cost of the Airport Corridor is \$2.15 million, significantly less than the other corridors examined. The projected Farebox Recovery Rate is about 23 percent. This rate could double if the Port of Portland and/or Peat Marwick assumptions prove out.
9. The capital cost of an Airport LRT to be \$214.5 million, much lower than the other corridors examined. Tri-Met engineers have indicated that this estimate includes costs which may not be needed with a "starter" line or can be deferred. This lower cost option will be estimated in Phase II.

Cost Effectiveness

10. The cost-effectiveness index is \$19.83, better than the I-205 South Corridor, but not as good as the others. This cost-per-rider would be substantially less if the Port of Portland, Peat Marwick and/or Engineering Staff assumptions prove out.

**TABLE ES-4  
FUNDING OPTION FINDINGS**

1. Given the estimated capital costs of a North/South HCT project, it is likely that federal funds will be necessary if funding for both projects is concurrently pursued in the next few years.
2. To have a reasonable chance of securing Section 3 New Start funds, it is necessary to secure an earmarked authorization for the project[s] in the next federal authorization bill. Whether these funds should be for a South Corridor Project or a combination North/South Corridor depends on technical, financial and political analyses that must be undertaken.
3. While the ISTEAs are authorized through federal FY 1997, a mini-authorization bill or an extension of the ISTEAs is anticipated for federal FY 1995 at the time Congress designates the National Highway System.
4. The acquisition of federal authorization for a North/South corridor must be done in the context of first/concurrently completing the funding of the Westside LRT project and the Hillsboro extension.
5. To maximize the likelihood of securing federal authorization, two principles should be followed:
  - [a] The further a project proceeds through the FTA AA/DEIS process, the more likely it is that a substantial federal authorization can be achieved. Accordingly, the region should take steps to complete AA/DEIS work as expeditiously as possible. It may not be realistic to have this work complete in time for a FY 1995 mini-authorization bill [if one happens], but this work is certainly able to be completed in time for FY 1998 authorization bill [if this one happens].
  - [b] The closer the region is to having secured commitments for all of its state and local funding, the more likely it is that a substantial federal authorization can be achieved. Accordingly, the region should take all steps to secure these commitments prior to federal FY 1995.
6. The HCT funding requirements and procedures in the State of Washington are in a state of flux. It is likely critical that C-TRAN secure approval of a substantial amount of state HCT funding no later than the 1994 legislative session.
7. Local [C-TRAN] funding will likely also be necessary. To obtain local funding, C-TRAN will have to seek voter approval of the project and, under existing law, the funding source. Possible local funding sources include a local option Sales and Use Tax and/or Motor Vehicle Excise Tax and/or Employer Tax in Clark County.
8. Assuming a FY 1995 mini-authorization bill, it may be desirable to have the local vote in 1994.
9. The funding possibilities in the State of Oregon are also in flux. It would be extremely helpful to gain approval of the state transit funding options in the current legislative session. This includes a constitutional amendment, emissions fee [or an equivalent] and the STP fund transfer to transit. If any one of these options fail in the 1993 session, it will be essential that they, or an equivalent, be approved in the 1995 session.
10. Local [Tri-Met] funding will also likely be necessary. Assuming that voter approval of one or more sources may be necessary, it may be desirable to have the local vote in 1994.

EXHIBIT B

**Action Plan**  
**Preparation of Alternatives Analyses and Funding Plans**  
**South/North High-Capacity Transit Corridor**

- (1) Seek to prepare Alternatives Analysis and the Draft Environmental Impact Statement on both the Milwaukie Corridor and I-5 North Corridor HCT segments. To accomplish this, request assistance from the Oregon and Washington Congressional delegations to include a provision in the FY 1994 federal Appropriations Bill to permit the preparation of AA/DEIS work in the entire South/North Corridor.
- (2) Seek to secure financing for an HCT alternative in the South/North Corridor. To accomplish this:
  - a. Take all steps necessary to seek the maximum practical authorization of Section 3 New Start funds for a South/North Corridor in the upcoming federal transportation authorization bill. The actual amount of federal funds, matching ration and distribution of federal funds between corridors should be determined on the basis of further technical, financial and political analyses.
  - b. The acquisition of federal authorization for a South/North Corridor must be done in the context of first completing the funding for the Westside LRT and the Hillsboro extension.
  - c. Since the possibility exists that a federal transportation authorization bill could occur as early as federal FY 1995, regional funding activities, including the approval of state and local funding sources in both Washington and Oregon, should be completed prior to this date.
  - d. The development and implementation of a funding package for the South/North Corridor should be done in the context of funding the long-term HCT system.
- (3) In addition to seeking the capital funds for a South/North HCT project, the region should take all steps necessary to secure sufficient funds to operate a South/North project and related bus feeder system.

**THE NORTH/SOUTH TRANSIT CORRIDOR STUDY**  
**Phase 1: Selection of Priority Corridor(s)**  
**Compilation of resolutions and correspondence**

**MILWAUKIE AND I-5 NORTH CORRIDORS**

**Resolutions: The City of Lake Oswego**  
**The City of Milwaukie**  
**The City of Oregon City**  
**The City Of Portland**  
**Tri-Met Board**

**Letters of recommendation:**

**The City of Gladstone**  
**The North Clackamas County Chamber of Commerce's Board of Directors**  
**The Milwaukie Downtown Development Association**  
**The Milwaukie Center Community Advisory Board**  
**The Oak Lodge Fire Protection District No.51**  
**OMSI, Ray Steinfeld, Jr - Chairman of the Board of Trustees**  
**Dean B. Ivy - Vice President, Facility Services**  
**United Finance Co., R.H. Parker, Jr. - President**  
**Ardenwald-Johnson Creek Neighborhood Association**  
**Brooklyn Neighborhood Association**  
**Buckman Neighborhood**  
**Hosford-Abernethy Neighborhood**  
**The Sellwood Moreland Improvement League**  
**Red Lion Hotels and Inns, David J. Johnson - President and CEO**  
**Saint Paul Lutheran Church, Pastor John Rosenberg**  
**The Parish of St John the Evangelist, Reverend Richard K. Toll**  
**Bill Griesar: citizen**  
**Clair Kuppenbender: citizen**  
**Barbara McGinnes & family**  
**H.R. "Ky" Holland, P.E.: citizen**  
**M. Alexis Dow: citizen**  
**William A. Furman: member of OMSI Board of Directors**  
**Jeffrey A. Farber: member of OMSI Board of Directors**  
**George Azumano: member of OMSI Board of Directors**

**Informal declarations of support:**

**Central Eastside Industrial Council**  
**Eastmoreland Neighborhood**  
**Kerns Neighborhood**  
**Reed Neighborhood**  
**Sunnyside Neighborhood**  
**Woodstock Neighborhood**

**Responses to Judy Wyers, Metro Councilor Questionnaire:**

Mary McGilvra  
Wm. Graham  
Rev. Carolyn J. Woods  
Joy Gill  
Tom Hansen  
Valerie Brown  
Bette Howard  
Orville Buffington  
Dr. Rita Marie Miller  
Ken Johnson  
Clifford E. Kane and Myrna M. Kane  
Roger C. Jones  
Kenneth McFarling  
Maxine and Glen Myhne  
Harold and Eleanor Bangs  
Suzie Budeau  
Richard Hostetleer  
Dan Beesom

**I-205 NORTH AND I-205 SOUTH CORRIDORS**

**Letters of recommendation:**

The Eighty-Second Avenue Business Association  
The Montavilla Business Association  
The Citizen's Steering Committee representing the Lents area in the SE  
Portland District Planning Process  
Outer SE Coalition of Neighborhoods  
Joyce Beedle: citizen

**Informal declarations of support:**

Foster-Powell Neighborhood  
Montavilla Neighborhood

**Responses to Judy Wyers, Metro Councilor Questionnaire:**

Herb Wilton

\* The Richmond Neighborhood supports both south corridor options

CITY OF MILWAUKIE

RESOLUTION NO. 6-1993

**A RESOLUTION RECOMMENDING PREFERRED HIGH CAPACITY TRANSIT CORRIDORS FOR FURTHER ANALYSIS.**

WHEREAS, on May 19, 1992, the City of Milwaukie entered into an intergovernmental agreement with Metro to examine several high capacity transit corridor options in a Preliminary Alternatives Analysis Study; and

WHEREAS, the Preliminary Alternatives Analysis Phase I evaluates broad corridor options and selects Priority Corridor(s) for further evaluation of a smaller set of modal and alignment options to incorporate into a more detailed Alternatives Analysis and Draft Environmental Impact Statement stage; and

WHEREAS, the City of Milwaukie has participated in the development of methodology, data-gathering, selection of evaluation criteria, conceptual alternatives, and corridor evaluation throughout this Study; and

WHEREAS, the City of Milwaukie has participated in assessing public opinion about the feasibility of several corridor segments under consideration; and

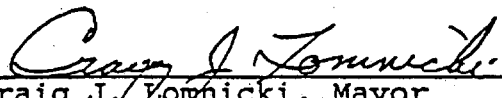
WHEREAS, the technical data and public opinion have indicated that the Milwaukie Corridor and the I-5 North Corridor appear to be the most cost-effective corridors, considering projected transit ridership and cost-effectiveness; and

WHEREAS, on March 9, 1993, the Milwaukie Planning Commission, having reviewed technical data and considered nine decision-making criteria, recommended selection of the Milwaukie/I-5 North Corridors as the preferred corridors to take into the Alternative Analysis phase; and

WHEREAS, the Milwaukie/I-5 North Corridors comply with all policy elements in the Milwaukie Comprehensive Plan;

NOW, THEREFORE, BE IT RESOLVED by the City of Milwaukie, a municipality of the State of Oregon, that Milwaukie hereby endorses and recommends to the Metro Council that the Milwaukie/I-5 North Corridors be selected as the priority and preferred corridors for the Alternatives Analysis stage of the Regional High Capacity Transit Study.

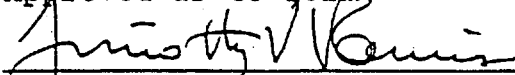
PASSED this 16th day of March, 1993, by the City Council of the City of Milwaukie.

  
\_\_\_\_\_  
Craig J. Lomnicki, Mayor

Attest:

  
\_\_\_\_\_  
Pat DuVal, City Recorder

Approved as to form:

  
\_\_\_\_\_  
City Attorney



RESOLUTION 93-26

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF LAKE OSWEGO RECOMMENDING PREFERRED HIGH CAPACITY TRANSIT CORRIDORS FOR FURTHER ANALYSIS.

380 "A" AVENUE  
POST OFFICE BOX 369  
LAKE OSWEGO,  
OREGON 97034  
(503) 635-0213  
FAX (503) 635-0269

WHEREAS, on May 19, 1992, the City of Milwaukie entered into an intergovernmental agreement with METRO to examine several high capacity transit corridor options in a Preliminary Alternatives Analysis Study; and

WHEREAS, the Preliminary Alternatives Analysis Phase I evaluates broad corridor options and selects Priority Corridor(s) for further evaluation of a smaller set of modal and alignment options to incorporate into a more detailed Alternatives Analysis and Draft Environmental Impact Statement stage; and

ALICE L. SCHLENKER,  
MAYOR

WHEREAS, the City of Milwaukie has participated in the development of methodology, data-gathering, selection of evaluation criteria, conceptual alternatives, and corridor evaluation throughout this study; and

ES C. (MIKE) ANDERSON,  
COUNCILOR

WHEREAS, the City of Milwaukie has participated in assessing public opinion about the feasibility of several corridor segments under consideration; and

HEATHER CHRISMAN,  
COUNCILOR

WHEREAS, the technical data and public opinion have indicated that the Milwaukie Corridor and the I-5 North Corridor appear to be the most cost-effective corridors, considering projected transit ridership and cost-effectiveness; and

WILLIAM HOLSTEIN,  
COUNCILOR

WHEREAS, on March 9, 1993, the Milwaukie Planning Commission, having reviewed technical data and considered nine decision-making criteria, recommended selection of the Milwaukie/I-5 North Corridors as the preferred corridors to take into the Alternative Analysis phase; and

BILL KLAMMER,  
COUNCILOR

ED MARCOTTE,  
COUNCILOR

WHEREAS, the Milwaukie/I-5 North Corridors comply with all policy elements in the Milwaukie Comprehensive Plan;

MARY PUSKAS,  
COUNCILOR

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Lake Oswego, a municipality of the State of Oregon, that the City of Lake Oswego hereby endorses and recommends to the METRO Council that the Milwaukie/I-5 North Corridors be selected as the priority and preferred corridors for the Alternative Analysis stage of the Regional High Capacity Transit Study.


Considered and enacted by the City Council of the City of Lake Oswego at a regular meeting held on the 16th day of March, 1993.

AYES: ANDERSON, HOLSTEIN, CHRISMAN, SCHLENKER, MARCOTTE, KLAMMER

NOES: NONE

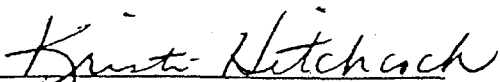
EXCUSED: PUSKAS

ABSTAIN: NONE

  
\_\_\_\_\_  
Alice L. Schlenker  
Mayor



ATTEST:

  
\_\_\_\_\_  
Kristi Hitchcock  
City Recorder

APPROVED AS TO FORM:

  
\_\_\_\_\_  
Jeffrey G. Condit  
City Attorney

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 93-1785 FOR THE PURPOSE OF ENDORING THE REGION'S SURFACE TRANSPORTATION PROGRAM PROJECTS AND AMENDING THE FY 93 TIP FOR INCLUSION OF THESE PROJECTS

Date: March 23, 1993

Presented by: Andrew Cotugno

## PROPOSED ACTION

This resolution would establish the region's priority Regional Surface Transportation Program (STP) projects for funding in the 1993-1998 Oregon Department of Transportation (ODOT) Six-Year Transportation Improvement Program (Six-Year Program). The region's priorities are consistent with the STP eligibility standards as listed in Section 1007(a) of the Intermodal Surface Transportation Efficiency Act (ISTEA) of 1991.

The resolution also acts to amend the FY 93 Transportation Improvement Program (TIP) to include the priority STP projects adopted through this resolution. The region's selected STP projects are listed in Exhibit A.

Prior to commencing construction, local governments and Metro must demonstrate that these projects are included in the Regional Transportation Plan (RTP) and Metro's Transportation Improvement Program (TIP) and are consistent with or conform to local comprehensive plans (transportation element public facility plans and/or transportation system plans), the statewide planning goals and the interim conformity guidance Clean Air Act Amendments (CAAA) 1990. Also, prior to construction, the projects must meet eligibility requirements as specified in ISTEA and subsequent USDOT and/or EPA guidelines.

## FACTUAL BACKGROUND AND ANALYSIS

### Program

ISTEA eliminated the Federal-Aid Interstate, Primary, Urban and Secondary programs. Previously, these programs were the primary source of federal assistance to local jurisdictions for highway-related construction and maintenance. The Metro region relied most directly on the Federal-Aid Urban (FAU) program. As partial replacement of the Federal-Aid programs, ISTEA created the Surface Transportation Program.

STP funds are analogous to block grant funds and may be spent on a broad variety of projects including road and bridge construction and maintenance, transit facilities (other than operation) and bicycle and pedestrian facilities (in or out of vehicular rights-of-way). STP funds may not be spent on roadways defined as local or rural minor collectors.

The state is appropriated STP funds each year up to the program limits authorized in ISTEA. From the total state STP appropriation, 10 percent is taken to fund safety projects and another 10 percent is taken to fund the Transportation Enhancement program. Fifty percent of the original total (i.e., 62.5 percent of the remaining 80 percent) is distributed, on the basis of population, to areas of the state with population greater than 200,000 and to all other areas of the state. ISTEA also stipulates that, in urbanized areas with population exceeding 200,000, the MPO (i.e., Metro) will program STP funds in consultation with the state transportation agency (i.e., ODOT). This formula has created a six-year "Regional STP program" of approximately \$60 million.

#### Prior Programming

STP appropriations in FY 92 and 93 account for approximately \$17 million of the total anticipated Regional STP program. Prior action approved programming of \$7.33 million of this \$17 million for the Hillsboro Extension of the Westside light rail system. Another \$2.5 million has been approved in prior resolutions to support planning activities stipulated in the FY 93 and 94 Unified Work Programs, as well as ISTEA-mandated planning programs. Approval of this resolution will conclude programming of all remaining FY 92 and 93 Regional STP funds (\$7,637,021). (The program balance of approximately \$43 million will be allocated in future years.)

#### Selection of Projects Now Seeking Approval

The current list of STP projects represents a transitional allocation process. The TPAC Transportation Improvement Program (TIP) Subcommittee was primarily responsible for assembling the list from nominations which were prioritized and submitted by the local jurisdictions. Further selection criteria considered by the TIP Subcommittee included the ability of projects to obligate funds in the current fiscal year and inclusion of a mix of construction and development projects. The Subcommittee believes that an emphasis on development projects will assure that future year STP appropriations will have available a backlog of suitable projects ready for allocation of construction dollars. This will assure the region's future ability to obligate short-lived federal funds in a timely manner. Additionally, it should be noted that all proposed "roadway" projects will be required to provide suitable bicycle and pedestrian facilities in compliance with VMT reduction objectives of the state Goal 12 Transportation Planning Rule.

#### Conclusions and Comments

Adoption of Resolution No. 93-1785 amends the TIP to include the region's priority STP activities. Those priorities are identified in Exhibit A to the resolution and are based upon actual appropriation of STP funds to the region.

Actual programming and authorization for the use of the funds is dependent upon OTC action. Consequently, the actual number of "fundable" projects may vary. Project development delays may also alter the ability to fund certain projects. Additionally, it appears that one project, Cornell Road widening from John Olsen Avenue to Cornelius Pass Road in Washington County, will require additional air quality analysis before it can be approved by the OTC and made eligible for receipt of federal assistance. Recognizing these possibilities, the resolution notes that any changes to program priorities that are greater than 10 percent of the anticipated funding level will require reconsideration through Metro/JPACT resolution. Priority changes below that amount will be addressed by the TIP Subcommittee.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 93-1785.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ENDORSING	)	RESOLUTION NO. 93-1785
THE REGION'S PRIORITY SURFACE	)	
TRANSPORTATION PROGRAM	)	Introduced by
PROJECTS AND AMENDING THE	)	Councilor Van Bergen
FY 93 TIP FOR INCLUSION OF	)	
THESE PROJECTS	)	

WHEREAS, The Intermodal Surface Transportation Efficiency Act (ISTEA) of 1991 included a new Surface Transportation Program for flexible funding of a broad range of transportation-related activities, including highway construction and repair, transit capital improvements, bicycle and pedestrian facilities and other activities specified in Section 1007(a) of ISTEA; and

WHEREAS, ISTEA requires the state to allocate proportionate sums of its annual STP appropriation to urban areas of the state with population greater than 200,000; and

WHEREAS, ISTEA also stipulates that in areas of the state with population greater than 200,000, the designated Metropolitan Planning Organizations (MPO) shall allocate STP funds in consultation with the state transportation planning agency, which in Oregon is the Oregon Department of Transportation (ODOT); and

WHEREAS, Metro is the designated MPO for the Portland metropolitan area; and

WHEREAS, The state is currently amending the 1993-1998 Six-Year Transportation Improvement Program; and

WHEREAS, the Joint Policy Advisory Committee on Transportation has directed TPAC and the TIP Subcommittee to complete programming of available FY 92 and 93 STP funds for inclusion in the 1993 Transportation Improvement Program for forwarding to the

Oregon Transportation Commission for inclusion in the 1993-1998 Six-Year Program by amendment; and

WHEREAS, the Transportation Improvement Program Subcommittee of TPAC has recommended that all residual sums of the region's FY 92 and 93 STP appropriation be programmed to achieve a balance between transportation development and construction projects; and

WHEREAS, the resulting selection of Regional STP program projects is based on regional transportation priorities identified by Metro and is balanced by equitable treatment of each jurisdiction's identified transportation priorities; and

WHEREAS, all recommended construction projects are identified in the 1992 RTP; and

WHEREAS, approval of construction projects contained in Exhibit A by the Oregon Transportation Commission is contingent upon demonstration of appropriate air quality modeling results per the interim guidelines adopted by FHWA, FTA and EPA pursuant to the Clean Air Act Amendment of 1990; now, therefore,

BE IT RESOLVED,

1. That the Metro Council amends the FY 93 TIP to include STP program elements as contained in Exhibit A.
2. That staff be directed to forward the STP project priorities for the 1993-1998 Six-Year Program amendment by the Oregon Transportation Commission.
3. That prior to OTC approval, Metro will provide ODOT with necessary documentation ensuring consistency of projects with interim guidelines adopted pursuant to the Clean Air Act Amendments of 1990.

4. That all projects, including construction of pedestrian or bicycle facilities, shall conform to the standards established in the federal ADA Access Guidelines and with the intent of the performance guidelines found in the State of Oregon's "Best Management Practices" for the Goal 12 Transportation Planning Rule.

5. That any changes to program priorities as a result of funding changes of 10 percent or greater or as a result of project delays will require reconsideration through JPACT/Metro resolution. Priority changes below 10 percent will be developed by the TIP Subcommittee.

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_,  
1993.

Judy Wyers, Presiding Officer

TW:lmk  
93-1785.RES  
3-24-93

**EXHIBIT A**  
**PROPOSED ALLOCATION OF FY 92 AND 93 REGIONAL STP FUNDS**

AGENCY & PROJECT	93	94	95	96	TOTAL
<b>PORTLAND</b>					
<b>1. FY93-94 ROAD REHBABILITATION</b>					
CONSTR	2,200,000	94,452			2,294,452
<b>2. BURGARD INTERSECTION IMPROVEMENT</b>					
PE	100,000				100,000
<b>3. COLUMBIA BLVD FEASIBILITY STUDY</b>					
PLANNING	150,000				150,000
<b>4. TRANSIT PREFERENTIAL CORRIDORS</b>					
PE	80,000				80,000
<b>5. SO. PORTLAND CIRCULATION</b>					
PLANNING	120,000				120,000
<b>6. SOUTHERN TRIANGLE</b>					
PE	32,000				32,000
<b>7. FY 93-94 SIGNAL SAFETY REMODELS</b>					
PE	30,000				
CONSTR		215,000			245,000
<b>8. FY93-94 SIGNAL RETIMING</b>					
PE	125,000				125,000
<b>SUBTOTAL PORTLAND</b>					
PE/PLANNING	637,000				
CONST	2,200,000	309,452			3,146,452



<b>CLACKAMAS COUNTY</b>	<b>93</b>	<b>94</b>	<b>95</b>	<b>96</b>	<b>TOTAL</b>
<b>9. 92ND AVE. - IDLEMAN TO CO. LINE</b>					
PE	150,000				150,000
<b>10. SUNNYSIDE ROAD- I-205 TO 152ND</b>					
PE/EIS	600,000				600,000
<b>11. LOWER BOONES FERRY/JEAN-MADRONA</b>					
CONSTR	300,000				300,000
<b>12. JOHNSON CREEK BLVD - LINWOOD AVE. TO 82ND AVE.</b>					
CONSTR		335,212			335,212
<b>SUBTOTAL CLACKAMAS COUNTY</b>					
PE/EIS	750,000				
CONSTR	300,000	355,212			1,405,212

WASHINGTON COUNTY	93	94	95	96	TOTAL
<b>13. CORNELL RD. - CORNELIUS PASS TO JOHN OLSEN AVE.</b>					
PE	200,000				
CONSTR	915,455				1,115,455
<b>14. FARMINGTON RD - MURRAY BLVD TO 167TH AVE</b>					
PE	1,000,000				1,000,000
<b>SUBTOTAL WASHINGTON COUNTY</b>					
PE	1,200,000				
CONSTR	915,455				2,115,455

**MULTNOMAH COUNTY**

93

94

95

96

**TOTAL**

15. I-84 - NE SANDY TO NE GLISAN-  
223RD CONNECTOR (207TH)

CONSTR

969,902

969,902

<b>PROGRAM TOTAL</b>	<b>93</b>	<b>94</b>	<b>95</b>	<b>96</b>	<b>TOTAL</b>
<b>PE</b>	<b>2,587,000</b>				
<b>CONSTR</b>	<b>4,385,357</b>	<b>664,670</b>			<b>7,637,021</b>

**PLANNED OBLIGATION FY 93 = 6,972,357**

**ALLOCATED = 7,637,021**

**BALANCE REMAINING = \$0**

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ENDORSING ) Resolution no. 93-1786  
THE MEMORANDUM OF UNDERSTANDING )  
ON STP FUNDS AND STP REPLACEMENT )  
FUNDS ) Introduced by  
 ) Councilor George Van Bergen

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. 89-1035 establishing a comprehensive financing strategy; and

WHEREAS, one element of the financing strategy envisions using federal Surface Transportation Program (STP) funds and new state revenues to flexibly contribute in the most efficient way possible to the multi-modal transportation program delineated in the current and subsequent Statewide Transportation Improvement Programs; and

WHEREAS, a Memorandum of Understanding (MOU) has been agreed to by ODOT, AOC, LOC and OTA (included as attachment A), that:  
(a) expresses their intent to implement a program making STP Funds available to alternate transportation projects, chiefly transit, (b) expresses their intent regarding how increased State Highway Trust Fund revenues will be allocated to the state, cities, counties and regions, and (c) agrees to cooperate to prepare and execute the Intergovernmental Agreements and administrative procedures needed to implement such programs; and

WHEREAS, Alternate Transportation Projects include all

projects which provide for alternative transportation modes and facilities to the automobile, chiefly transit, and are eligible for STP Funds and also include but are not limited to bicycle facilities, pedestrian facilities, rideshare activities and demand management projects; and

WHEREAS, this definition of Alternate Transportation Projects does not exclude such inter-modal facilities,"as may be desired by the Port of Portland and" that would otherwise be eligible for STP funding; and

WHEREAS, this MOU is dependent on legislative approval of the proposed increase in revenues to the state highway trust fund and only applies to newly enacted revenues; and

WHEREAS, If the legislature does not enact the proposed increases, this MOU will require amendment by all parties; now, therefore,

BE IT RESOLVED,

That the Metro Council:

1. Endorses the Memorandum of Understanding on STP Funds and STP Replacement Funds.

Judy Wyers, Presiding Officer

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 93-1786 FOR THE PURPOSE OF ENDORISING THE MEMORANDUM OF UNDERSTANDING FOR STP FUNDS AND STP REPLACEMENT FUNDS

Date: April 8, 1993

Presented by: Andrew Cotugno

#### PROPOSED ACTION

Endorsement of a Memorandum of Understanding which would maximize dedication of federal STP funds to Alternate Transportation Projects, allocate new state gas tax revenues amongst ODOT and the cities and counties to support programmed, constitutionally permitted transportation improvement projects and define the administrative procedures to ratify these mandates.

#### FACTUAL BACKGROUND AND ANALYSIS

Three statewide planning efforts: the Oregon Roads Finance Study, the Oregon Rail Passenger Plan and the Oregon Transportation Plan, yielded the Oregon Transportation Finance Plan approved by JPACT and the Metro Council in December of 1992. The financing plan is comprehensive in nature, with funding proposals to meet urban, rural and intercity needs statewide by all of the responsible service providers. ODOT, cities, counties, transit districts, ports, airports and metropolitan planning organizations are all affected. The financing plan is consistent with Metro Resolution No. 89-1035 which addressed the strategies for a comprehensive multi-modal approach in the Portland region. Two of the finance plan recommendations are the subject of the MOU being considered for approval at this time: dedication of STP funds to "non-traditional" projects, and an increase in gas taxes.

The MOU provides for dedication of flexible federal highway funds (i.e., federal Surface Transportation Program (STP) funds) to support Alternative Transportation Projects. As stated in the MOU,

"Alternate Transportation Projects include all projects which provide for alternative transportation modes and facilities to the automobile, chiefly transit, and are eligible for STP Funds. Alternate Transportation Projects also include but are not limited to bicycle facilities, pedestrian facilities, rideshare activities and demand management projects."

Dedication of STP funds for this class of projects will leave other, "traditional" road-type projects unfunded. Therefore, in a dollar-for-dollar exchange, STP funding that ODOT and local jurisdictions "give up," will be "back filled" by ODOT with revenue generated by a proposed increase of 4¢ on the gas tax, plus associated truck weight-mile taxes, for the next four years. Under terms of the MOU, the new Highway Trust Fund revenues would be allocated 60.05 percent to the state, 24.38 percent to counties, and 15.57 percent to cities as currently set forth in ORS 366.524. The 60.05 percent of new Highway Trust Fund Revenues allocated to the state includes a 9.3 percent allowance for funding the STP Replacement

funding program (and additionally, a local bridge needs program derived from analysis of "unmet needs" contained in ODOT's current six-year program).

Metro STP Replacement Program.

Metro anticipates appropriation of \$27 million to the region from FY 1994 through FY 1997 that will be eligible for the "back fill" proposal. Accordingly, in the future, the STP Funds which are formula allocated to Metro will be used to fund specific Alternate Transportation Projects, and, if necessary, road projects based on Metro-approved criteria and procedures. A four-year program of Alternate Transportation Projects, covering federal FY 1994 through FY 1997 will be adopted by Metro. Correspondingly, Metro will also administer a State Highway Trust Fund program. Projects in the Trust Fund program will be limited to constitutionally restricted purposes.

The Port of Portland has expressed concern that some of their contemplated inter-modal, freight movement-type projects are not explicitly included in the definition of Alternate Transportation Projects, i.e., Port projects have been relegated to the "not limited to" list. Language is included in the Resolution which, without amending the MOU, addresses the Port's concerns.

Program Administration

The MOU has been approved by the Oregon Department of Transportation, the Association of Oregon Counties (AOC), the League of Oregon Cities (LOC), and the Oregon Transit Association (OTA). Intergovernmental agreements between these parties and Metro will be needed to fully define administrative procedures for the programs contemplated in the MOU. Finally, the splits are based upon an assumption that the full financing package submitted to the legislature will be approved. Should the full package not be adopted, the MOU provides that mutually agreed upon revisions will have to be negotiated. The MOU also mandates formation of a transportation finance policy committee to address issues relating to the MOU and applicable Intergovernmental Agreements.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Resolution No. 93-1786.

TW  
4-93



**MEMORANDUM OF UNDERSTANDING  
ON STP FUNDS AND STP REPLACEMENT FUNDS**

**I. PARTIES**

This Memorandum of Understanding (MOU) is between the Oregon Department of Transportation ("ODOT" or "State"), the Association of Oregon Counties (AOC), the League of Oregon Cities (LOC), the Metropolitan Service District (Metro) and the Oregon Transit Association (OTA).

**II. BACKGROUND AND PURPOSE**

1. This MOU records the understanding of the parties with respect to the funding package developed by the Oregon Roads Finance Study (ORFS) in support of the Oregon Transportation Plan (OTP).
2. The MOU comes from the desire of the parties to use federal Surface Transportation Program (STP) funds and new state revenues to flexibly contribute in the most efficient way possible to the multi-modal transportation program delineated in the current and subsequent Statewide Transportation Improvement Programs.
3. By their execution of this MOU, ODOT, AOC, LOC, Metro and OTA are: (a) expressing their intent to implement a program making STP Funds available to alternate transportation projects, chiefly transit, (b) expressing their intent regarding how increased State Highway Trust Fund revenues will be allocated to the state, cities, counties and regions, and (c) agreeing to cooperate to prepare and execute the Intergovernmental Agreements and administrative procedures needed to implement such programs.
4. It is understood that this MOU is dependent on legislative approval of the proposed increase in revenues to the state highway trust fund and only applies to newly enacted revenues.
5. If the legislature does not enact the proposed increases, the parties agree to cooperate to amend this MOU in a way that is consistent with any newly enacted legislation. The basic policy to be used in amending this MOU is that the benefits to all parties from this MOU shall be equitably adjusted.

**III. DEFINITIONS**

1. Alternate Transportation Projects include all projects which provide for alternative transportation modes and facilities to the automobile, chiefly transit, and are eligible for STP Funds. Alternate Transportation Projects also include but are not limited to bicycle facilities, pedestrian facilities, rideshare activities and demand management projects.

2. STP Replacement Funding is a supplemental amount of new Highway Trust Fund revenues paid to local jurisdictions by ODOT to replace: (i) STP Funds which would have been allocated to cities and counties pursuant to the Historical STP Formula Allocation, and (ii) Metropolitan STP Funds allocated to Alternate Transportation Projects. STP Replacement Funding will be on a dollar-for-dollar basis. The money to be used by ODOT for STP Replacement Funding is incorporated in its share of the proposed increased Highway Trust fund revenues.
3. Historical STP Formula Allocation is the formula employed by ODOT in FY 1992 and FY 1993 to allocate STP Funds to counties and to cities outside of the Portland Region. Under this formula allocation, counties received 147.6% of their FY 1991 Federal Aid Secondary (FAS) allocation and cities greater than 5,000 population and MPOs outside of the Portland Region received 147.6% of their FY 1991 Federal Aid Urban (FAU) allocation. The Historical STP Formula Allocation provides the basis for the STP Replacement Funding provided in this MOU.

#### **IV. ALLOCATION OF STP FUNDS**

1. This MOU does not affect the allocation of STP Funds to Transportation Enhancement Projects, Safety Construction Projects, or Planning and Research Funds.
2. To the extent that replacement funding and STP Replacement Funding is available through increased Highway Trust Funds allocated to the State for this purpose, or through a bonding program or another mutually agreed-upon solution, the balance of all STP Funds will be used to fund Alternate Transportation Projects as provided in IV. 5 below. These funds may only be used for road projects to the extent that such funds are not needed to meet Alternate Transportation needs or that such funds cannot be obligated to Alternate Transportation Projects within agreed-upon deadlines.
3. As provided by ISTEA, about \$10.9 million per year will be allocated to areas with a population of 5,000 or less. These funds are among those made available to Alternate Transportation Projects on a first priority basis.
4. The allocation of STP Funds to Alternate Transportation Projects will start with the federal FY 1994 program.
5. By April 15, 1993, OTA will propose a detailed process for allocating STP Funds to Alternate Transportation Projects for Oregon Transportation Commission (OTC) action by May 31, 1993. The OTA proposal shall be based on the following concepts:
  - (a) STP Funds will be used to fund specific Alternate Transportation Projects based on OTC approved criteria and procedures and in accordance with the requirements of the State Transportation Improvement Program (STIP).

- (b) A four-year program of Alternate Transportation Projects, covering federal FY 1994 throughout FY 1997, will be considered for adoption by the OTC by October 1993 for inclusion in the appropriate STIP.
  - (c) The proposal will include priorities and a project ranking scheme for allocating STP Funds.
  - (d) Once a priority is established for allocating STP Funds to projects required to comply with the Americans with Disabilities Act, the OTC will use the Special Transportation Fund (STF) [established in ORS 391.800] for capital projects and purchases only to the extent that STP Funds are insufficient or impractical to meet special transportation capital needs.
  - (e) This proposal will include a statewide committee to advise the OTC on allocating STP Funds.
6. STP Funds which are formula allocated to Metro will be used to fund specific Alternate Transportation Projects and, if necessary, road projects based on MPO-approved criteria and procedures. A four-year program of Alternate Transportation Projects, covering federal FY 1994 through FY 1997 will be adopted by the MPO.
- V. REPLACEMENT FUNDS FROM NEW HIGHWAY TRUST FUND REVENUES**
- 1. New Highway Trust Fund revenues shall be allocated 60.05 percent to the state, 24.38 percent to counties and 15.57 percent to cities as currently set forth in ORS 366.524. The 60.05 percent of new Highway Trust Fund Revenues allocated to the state includes a 9.3 percent allowance for funding local bridge needs and STP Replacement funding (which ODOT provides to cities, counties and Metro).
  - 2. ODOT will allocate a share of its annual proceeds from the increased Highway Trust Fund revenues to counties and to cities outside the Portland Region, which equals the annual amount of STP Funds which would have gone to counties and cities outside of the Portland Region under the Historical STP Allocation Formula to the extent that sufficient funds are available through the 9.3 percent allowance or through a bonding program or another mutually agreed-upon solution.
  - 3. ODOT will allocate a share of its annual proceeds from the increased Highway Trust Fund revenues to the Portland Region, which equals the amount of formula STP Funds allocated by Metro to Alternate Transportation Projects to the extent that sufficient funds are available through the 9.3 percent allowance or through a bonding program or another mutually agreed-upon solution.
  - 4. AOC, LOC and ODOT will define a process in their Intergovernmental Agreement for equitably sharing any STP or new Highway Trust Fund revenues made available because STP Funds were not used for Alternate Transportation Projects.

5. A city or county may request STP Funds in lieu of all or a portion of its State Highway Trust Fund revenues (on a dollar-for-dollar basis) to the extent that STP Funds are available to ODOT.
6. Methods for adjusting the allocation of STP Funds and increased Highway Trust Fund revenues to ensure that all parties are equitably benefitted/impacted by Obligational Ceilings, appropriation levels or other such factors will be addressed in the Intergovernmental Agreements and administrative procedures.

#### **VI. OBLIGATIONAL RESPONSIBILITIES**

1. It is the intention of the parties that the programs and procedures which implement this MOU ensure that STP Funds do not lapse and annual Obligational Authority is maximized.
2. To facilitate the transition period during federal FY 1994, any federal FY 1994 STP Funds which can not be obligated to Alternate Transportation Projects by March 31, 1994 may be reallocated by ODOT to any eligible projects in any jurisdiction which can obligate such funds during FY 1994. Commencing in April 1994, ODOT and OTA will jointly review the deadline for obligating STP Funds to Alternate Transportation Projects and seek to agree upon a deadline for subsequent fiscal years.

#### **VII. SUBSEQUENT ACTIVITIES**

1. Intergovernmental Agreements between ODOT and AOC and LOC and ODOT and METRO will be prepared based on the concepts in this MOU and will address:
  - [a] financial adjustments to ensure that funds are being distributed equitably; and
  - [b] renegotiation and amendment at the conclusion of the ISTEA to ensure that the terms and provisions of the intergovernmental Agreements and administrative procedures are consistent with the subsequent federal transportation authorization act.
2. This MOU and all final agreements will be subject to applicable laws and will be adjusted to reflect any changes in those laws.
3. The parties to this MOU agree to the formation of a transportation finance policy committee to address issues relating to the MOU and applicable Intergovernmental Agreements. The policy committee will facilitate the maintenance and enhancement of relationships among the parties involved in transportation.

This MOU was approved by the Oregon Transportation Commission on \_\_\_\_\_ at which time the Director of ODOT was authorized and directed to sign said MOU for and on behalf of the Commission. Said authority is set forth in Volume \_\_\_\_, Page \_\_\_\_, Minute Book of the Oregon Transportation Commission. Signed this \_\_\_\_ day of \_\_\_\_\_, 199\_\_.

APPROVED FOR LEGAL SUFFICIENCY

FOR THE DEPARTMENT OF  
TRANSPORTATION

\_\_\_\_\_  
Deputy Attorney General

\_\_\_\_\_  
Director

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

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

FOR THE METROPOLITAN SERVICE  
DISTRICT

FOR THE ASSOCIATION OF OREGON  
COUNTIES

\_\_\_\_\_  
Executive Officer

\_\_\_\_\_  
President

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

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

FOR THE LEAGUE OF OREGON CITIES

FOR THE OREGON TRANSIT  
ASSOCIATION

\_\_\_\_\_  
President

\_\_\_\_\_  
President

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

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



**METRO**

2000 S.W. First Avenue  
Portland, OR 97201-5398  
503/221-1646

# Memorandum

Date: March 24, 1993  
To: TPAC  
From: *AC* Andrew C. Cotugno, Planning Director  
Re: Memorandum of Understanding

Attached is <sup>v</sup>the Memorandum of Understanding (MOU) between ODOT, Metro, AOC, LOC and OTA on transfer of STP funds to alternative modes and replacement with Trust Fund revenues. It was approved by the Oregon Transportation Commission on March 31, 1993 and is recommended for approval and execution by Metro. This MOU would allow the majority of STP funds in the state to be transferred to alternative transportation projects, chiefly transit. This agreement would be in force only if the proposed increase in revenues to the Highway Trust Fund is enacted by the Legislature. A resolution and staff report authorizing execution of the MOU will be available at the TPAC meeting.

ACC:lmk

Attachment

duesfun.wq1  
 4/7/93  
 VOLUNTARY DUES SUMMARY -

JURISDICTION	Proposed Dues	Official Response		Cotugno's Prognostication			
		Committed	Declined	Highly Likely	Likely	Unlikely	Undetermined
BEAVERTON	\$25,277.55			\$25,277.55	\$25,277.55		
CORNELIUS	\$2,762.75						\$2,762.75
DURHAM	\$344.00						\$344.00
FAIRVIEW	\$1,279.25						\$1,279.25
FOREST GROVE	\$6,024.30			\$6,024.38	\$6,024.38		
GLADSTONE	\$4,699.90						\$4,699.90
GRESHAM	\$31,050.30			\$31,050.30	\$31,050.30		
HAPPY VALLEY	\$821.30						\$821.30
HILLSBORO	\$17,350.50			\$17,350.50	\$17,350.50		
JOHNSON CITY	\$266.60		\$266.60			\$266.60	
KING CITY	\$887.95					\$887.95	
LAKE OSWEGO	\$13,710.55				\$13,710.55		
MAYWOOD PARK	\$355.40						\$355.40
MILWAUKIE	\$8,406.50	\$8,406.50		\$8,406.50	\$8,406.50		
OREGON CITY	\$7,228.30				\$7,228.30		
PORTLAND	\$197,058.25			\$197,058.25	\$197,058.25		
RIVERGROVE	\$126.85						\$126.85
SHERWOOD	\$1,563.05		\$1,563.05			\$1,563.05	
TIGARD	\$13,443.95						\$13,443.95
TROUTDALE	\$3,779.70						\$3,779.70
TUALATIN	\$7,155.20				\$7,155.20		
WEST LINN	\$7,587.35				\$7,587.35		
WILSONVILLE	\$3,966.75				\$3,966.75		
WOOD VILLAGE	\$1,255.60		\$1,255.60			\$1,255.60	
CLACKAMAS CO	\$40,980.29			\$40,980.29	\$40,980.29		
MULTNOMAH CO	\$22,971.89			\$22,971.89	\$22,971.89		
WASHINGTON CO	\$57,716.75			\$57,716.75	\$57,716.75		
PORT OF PORTLAND	\$59,756.35			\$59,756.35	\$59,756.35		
TRI MET	\$59,756.35	\$59,756.35		\$59,756.35	\$59,756.35		
<b>TOTAL</b>	<b>\$597,583.48</b>	<b>\$88,162.85</b>	<b>\$3,085.25</b>	<b>\$526,349.11</b>	<b>\$565,997.26</b>	<b>\$3,973.20</b>	<b>\$27,813.10</b>

**Attachment A**

<b>Proposed Metro FY 93-94 Budget</b>			
<b>Local Government Dues Assessment</b>			
<b>Proposed</b>	<b>Budget</b>	<b>Dues</b>	<b>Dues Share</b>
RLIS/Database Maintenance	\$871,500	\$213,375	24.5%
Technical Assistance			
Data Resource Center	\$ 68,600	\$ 68,600	100%
Travel Forecasts	\$138,600	\$ 11,447	8%
Travel Surveys/Model Refinement	\$966,000	\$ 56,721	6%
RTP Update	\$325,000	\$ 17,278	5%
Transportation Demand Management	\$148,500	\$ 8,176	6%
Willamette Crossing Study	\$255,000	\$ 45,500	18%
Urban Arterial Fund	\$241,500	\$ 12,401	5%
Regional HCT Plan	\$262,630	\$ 4,065	1.5%
Region 2040	\$757,000	\$125,000	17%
Urban Reserves Designation	\$101,000	\$ 35,000	35%
<b>TOTAL DUES</b>		<b>\$597,563</b>	

2DUE0412.PF  
 April 12, 1993  
 bc





# Port of Portland

Box 3529, Portland, Oregon 97208  
503/231-5000

731-7517

TRANSPORTATION DEPT

MAR 31 1993

March 30, 1993

Andy Cotugno  
Director  
METRO  
2000 SW 1st  
Portland, OR 97201

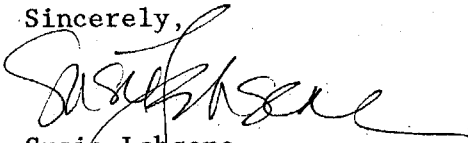
Dear Andy:

This is to confirm that the Port of Portland will be sponsoring an Intermodal Facilities Tour on Friday, April 30th. The tour, which will take place on the Yachts of Fun charter boat, will begin at Riverplace after TPAC (11:45) and continue up to Terminal 6 on the Columbia River. A charter bus will take us from there to Portland International Airport and back to Riverplace. We anticipate the tour will take about three hours. Lunch will be provided. We would like to invite both TPAC and JPACT members.

To confirm our reservation with the charter company, we need to provide them with the number of passengers taking the tour as soon as possible. I would like to get an estimate of the number of people interested at the April 1st TPAC meeting and the April 8th JPACT meeting. After the initial count, could you follow-up with a confirmation letter, and calls if necessary, to get us a final count no later than Monday, April 26th?

We appreciate your help on this effort. I think it will be fun and informative for all involved.

Sincerely,



Susie Lahsene  
Senior Planner

# STOP



## Sensible Transportation Options for People

TRANSPORTATION DEPT

MAR 25 1993

March 21, 1993

MAIL

MAR 20 1993

Lois Kaplan  
Transportation and Planning  
Metropolitan Service Organization  
2000 SW First Avenue  
Portland, OR 97201-5398

RE: REQUEST FOR ADDITIONAL WESTERN BYPASS ALTERNATIVE

Dear Lois:

Enclosed is a copy of our letter to Douglas Capps, Chairman, Western Bypass Study Steering Committee, requesting the inclusion of an additional alternative in the Western Bypass Study.

Please insure that each member of JPACT and TPAC receives a copy of this letter. It is important but not time urgent and therefore you could include them in the next round of agenda packets.

Please call if you have any questions.

Molly O'Reilly,  
President, Sensible  
Transportations Options  
for People


(2) The north-south capacity provided by the northern section of the Bypass very substantially exceeds the demand for travel, in this direction, in this area.


(3) Inclusion of the northern section of the Bypass succeeds in the diversion of only an insignificant amount of traffic (approximately 400 out of 6000 trips) away from Highway 217. It is apparent that the northern section of the Bypass would be utilized to serve primarily local, rather than regional traffic.

(4) There are a number of areas in the Bypass network where the projected traffic volumes show an F level of service -- resulting in a complete breakdown in the transportation system in those locations. The inclusion or exclusion of the northern section of the Bypass has virtually no effect, neither increasing nor decreasing significantly the level of congestion in these areas.

From the forgoing we have come to the conclusion that this alternative --sometimes referred to as the "Bypass without the Bypass" --is at least as viable as the Bypass, and therefore a reasonable alternative to it. Further, it would appear that this alternative could save the taxpayers several hundreds of millions of dollars, and therefore prevent a potentially gross misallocation of resources. Federal regulations (40 CFR 1502.14) require that, when requested, all such reasonable alternatives must be evaluated in the Environmental Impact Statement.

Very truly yours,

  
Molly O'Reilly,  
President, Sensible  
Transportations Options  
for People

  
David Stewart,  
Member, Citizens Advisory  
Committee, Western Bypass  
Study

cc: Metro Council  
Metro Transportation Policy Alternatives Committee  
Metro Joint Policy Advisory Committee on Transportation  
Western Bypass Study Steering Committee Members  
Western Bypass Study Citizen's Advisory Committee  
Western Bypass Study Technical Advisory Committee  
Michael Hollern, Chair, Oregon Transportation Commission  
Michal Wert, Manager, Project Development Program, ODOT  
William Ciz, Project Manager, Western Bypass Study, ODOT  
Ann Squier, Governor's Office

COMMITTEE MEETING TITLE

PACT

DATE

4-8-93

NAME	AFFILIATION	PORT Tour
M- TOM WALSH	TRI-MET	
M- DAVE STURDEVANT	CLARK County	
M- BRUCE WARNER	ODOT	
M- Keith Ahola	WSDOT	
M- Mike Thorne	POP	yes
M- Roy Rogers	WASHINGTON city	yes
M- Craig Lomnick	City of Clackamas Co.	yes
M- Ed Bergquist	CLACKAMAS Co.	yes
M- Jon Kristad	Metro	yes
M- Gary Hansen	Multico.	
IA- Steve Greenwood	DEQ	
M- Bruce Hagensen	City of Vancouver (?)	
M- BRENNER GUSTO	Cities of Mult. Co. City of ORIGINATOR	YES
M- Earl Blumina	Portland	
M- Roger Buchanan	Metro Council	
G- Rod Monroe	Metro Council (alb.)	
M- <del>Craig</del> <del>Bauer</del>	Metro	
S- John Cullerton	Mult. County Metro	
G- Kathy Buss	Mult County	
G- Bob BATHMAN	MCCI (?)	
G- DAVE WILLIAMS	ODOT	
MA- David Lohman	Port of Portland	
S- Robin Meathley Phillips	ODOT	

