

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 92-1559 FOR THE PURPOSE  
OF ENDORSING TRI-MET GRANT APPLICATIONS FOR FUNDING  
UNDER 1) SECTION 20, HUMAN RESOURCES PROGRAM, AND  
2) SECTION 16(B) (2)/CIGARETTE TAX, SPECIAL TRANSPORTA-  
TION DISCRETIONARY PROGRAM

Date: January 22, 1992

Presented by: Andrew Cotugno

PROPOSED ACTION

Adopt Resolution No. 92-1559 endorsing Tri-Met's grant applica-  
tions for funding two projects:

- 1) Section 20, Human Resources Program . . . . . \$187,500 total  
(\$150,000 federal)
- 2) Section 16(b) (2)/Cigarette Tax, Special  
Transportation Discretionary Program. . . . . \$1,000,000 total  
(State and federal amounts to be determined  
later.)

TPAC has reviewed the grant application requests and recommends  
approval of Resolution No. 92-1559 with a request that additional  
details be provided the Committee by Tri-Met's Committee on  
Accessible Transportation following its next meeting.

FACTUAL BACKGROUND AND ANALYSIS

Section 20, Human Resources Program

Tri-Met intends to submit a Section 20 Human Resources Program  
grant application to the Federal Transit Administration by the  
end of February. The funding would provide for a Disadvantaged  
Business Enterprise (DBE) training program to enable Disadvan-  
taged Business Enterprises to participate in contracts related to  
the Westside Light Rail Project. Tri-Met received Section 20  
funds for a similar program during construction of the Banfield  
Light Rail Project. Exhibit A describes the program to be  
undertaken using the funds.

Section 16(b) (2)/Cigarette Tax, Special Transportation  
Discretionary Program

Tri-Met is also preparing a grant application requesting  
approximately \$1.0 million with a distribution of 60 percent for  
capital and 40 percent for operating and training. The funding  
will come from the ODOT-administered Special Transportation Fund  
Discretionary Program for the elderly and disabled (now termed  
'elderly persons and persons with disabilities').

Project specifics are currently being developed by the Committee  
on Accessible Transportation and Tri-Met's Special Transportation

Fund Advisory Committee for approval by the Tri-Met Board in February. The grant funds would be used to purchase specially equipped vehicles and/or equipment and to provide transportation services.

EXECUTIVE OFFICER RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 92-1559.

ACC:BP:lmk  
92-1559.RES  
1-31-92

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF ENDORSING ) RESOLUTION NO. 92-1559  
TRI-MET GRANT APPLICATIONS FOR )  
FUNDING UNDER 1) SECTION 20, ) Introduced by  
HUMAN RESOURCES PROGRAM, AND ) Councilor Richard Devlin  
2) SECTION 16(B)(2)/CIGARETTE )  
TAX, SPECIAL TRANSPORTATION )  
DISCRETIONARY PROGRAM )

Whereas, Tri-Met intends to submit a Section 20 Human Resources Program grant application to the Federal Transit Administration by the end of February; and

Whereas, This funding would provide for a Disadvantaged Business Enterprise (DBE) training program to enable Disadvantaged Business Enterprises to participate in contracts related to the Westside Light Rail Project; and

Whereas, Tri-Met is also preparing a grant application in the amount of \$1.0 million to utilize funds under the ODOT-administered Special Transportation Fund Discretionary Program for the elderly and disabled; and

Whereas, The Discretionary Program optionally uses a combination of cigarette taxes and Section 16(b)(2) funds, the ratio of which is not established at this time; now, therefore,

BE IT RESOLVED:

1. That the Council of the Metropolitan Service District (Metro) endorses Tri-Met's grant application for the Section 20 Human Resources Program as outlined in Exhibit A to the resolution.

2. That Metro endorses Tri-Met's grant application for

funding under ODOT's Special Transportation Fund Discretionary Program for the elderly and disabled, and recognizes that the amounts from the cigarette tax and from Section 16(b)(2) will be determined at a later time as will the list of projects when Tri-Met has developed them.

3. That the Transportation Improvement Program and its Annual Element be amended to reflect these allocations.

4. That these actions are consistent with the Regional Transportation Plan and affirmative Intergovernmental Project Review is hereby given.

ADOPTED by the Council of the Metropolitan Service District  
this \_\_\_\_\_ day of \_\_\_\_\_, 1992.

Jim Gardner, Presiding Officer

ACC:BP:lmk  
92-1559.RES  
1-22-92

EXHIBIT A

Disadvantaged Business Enterprise Training Program

Tri-Met intends to apply for a Section 20 Human Resources Program grant to provide funding for a Disadvantaged Business Enterprise (DBE) Training Program to enable DBE's to participate in contracting opportunities available through the Westside Light Rail Project. The Westside Light Rail Project will be the most extensive public works project in the history of the metropolitan area and will offer opportunities for participation by DBE's in professional services, equipment and supplies, and construction contracts. The training program will be designed to provide DBE's information on contracting opportunities and the procurement process, bonding, and required certification. The program will include workshops conducted locally and at other locations within the region as well as production of a videotape to be distributed throughout the nation. The goal is to provide technical assistance to DBE's to increase their participation in Westside contracting opportunities.

Budget:       \$187,500  
              \$150,000 (Federal share)



**METRO**

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

# Memorandum

Date: January 29, 1992  
To: TPAC/JPACT/RPAC  
From: Andrew C. Cotugno, Transportation Director  
Ethan Seltzer, Planning Supervisor  
Re: Local Government Dues Assessment

In accordance with ORS 268, the Metro Council must notify local governments of the planned dues assessment 120 days prior to the start of the fiscal year (i.e., by March 1). In addition, Metro must consult with a "local government advisory committee" to determine whether it is necessary to assess the dues.

In January 1990, the Metro Council designated JPACT and the UGM PAC as the "local government advisory committees" to satisfy this requirement, JPACT for the Transportation Department use of the dues and the UGM PAC for the Planning and Development Department's use of the dues. Pending formation of RPAC, it is proposed that JPACT serve this purpose for the FY 93 budget.

ACC:lmk

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 92-1561C FOR THE PURPOSE OF PROVIDING THE ASSESSMENT OF DUES TO LOCAL GOVERNMENTS FOR FY 1992-93

Date: February 12, 1992

Presented by: Andrew Cotugno

## FACTUAL BACKGROUND AND ANALYSIS

### Assessment Authorization and Procedure

ORS 268.513 (Attachment A) authorizes the Metro Council to:

"charge the cities and counties within the District for the services and activities carried out under ORS 268.380 and 268.390."

If the Council follows the recommendation of the Local Government Advisory Committee and determines that it is necessary to charge these local governments, it must establish the total amount to be charged and assess each city and county on the basis of population. The assessment cannot exceed \$.51 per capita per year.

In making the assessment, the Council is required to notify each city, county, Tri-Met and the Port of Portland of its intent to assess and the amount of the assessment at least 120 days before the beginning of the fiscal year for which the charge will be made. The notification for the FY 1991-92 assessment must be made prior to March 3, 1992. Assessments must be paid before October 1, 1992.

TPAC reviewed the proposed dues assessment at its meeting on January 31 and deferred action until its special February 12 meeting to allow further review of jurisdictional budgets prior to its recommendation. At that time, they recommended adoption of this resolution.

### Proposed FY 1991-92 Assessment

Exhibit A shows the population figures and proposed dues assessment schedule. The values are based upon the latest certified population figures from the Center for Population Research and Census at Portland State University. Each county's unincorporated population estimate is based upon data provided by the Center for Population Research and Census using a formula devised by Metro staff.

The maximum assessment at \$.51 per capita for cities and counties and at 12.5 percent of that rate for Tri-Met and the Port of Portland is \$689,280. In the FY 91-92 budget, the actual dues

assessment was approved at \$.43 which in FY 92-93 would be \$581,158. The Transportation and Planning and Development Departments' proposed budgets are based upon continuation of this \$.43 level. However, options for a higher level assessment are presented in Attachment B.

Use of the dues assessment for the Transportation Department and the Planning and Development Department at a \$.43 level generally falls into the following major categories:

1. Grant Match - \$150,845 - The dues plus ODOT and Tri-Met local match are used to leverage federal funding toward Transportation Planning. The program areas, which must be approved in the FY 92 Unified Work Program, include:

- Model Refinement
- Local Technical Assistance
- Regional Transportation Plan Update
- Transportation Improvement Program
- Willamette River Bridge Study
- Demand Management
- Air Quality Plan
- Regional HCT Plan
- Management and Coordination

2. Data Resource Center - \$281,425 - The Data Resource Center publishes periodic updates of historical and forecasted population and employment growth throughout the Portland metropolitan area. In addition, the Regional Land Information System (RLIS) is operational and provides land use-related data. Funding sources for the Data Resource Center include dues, transportation grants, solid waste fees and Metro's General Fund. In general, the dues share is approximately 25 percent of the Data Section budget. Revenues collected from data sales are used to reduce the dues share of this budget.
3. Region 2040/Urban Growth Management - \$148,887 - The Transportation Department and Planning and Development Department are jointly sponsoring the Region 2040 program. In addition, associated projects relating to urban reserves and infill are underway. Other funding sources in the program include Metro General Fund, Tri-Met and ODOT.

#### EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Resolution No. 92-1561C.



ATTACHMENT A

268.513 Service charge for planning functions of district. (1) The council shall consult with the advisory committee appointed under ORS 268.170 before determining whether it is necessary to charge the cities and counties within the district for the services and activities carried out under ORS 268.380 and 268.390. If the council determines that it is necessary to charge cities and counties within the district for any fiscal year, it shall determine the total amount to be charged and shall assess each city and county with the portion of the total amount as the population of the portion of the city or county within the district bears to the total population of the district provided, however, that the service charge shall not exceed the rate of 51 cents per capita per year. For the purposes of this subsection the population of a county does not include the population of any city situated within the boundaries of that county. The population of each city and county shall be determined in the manner prescribed by the council.

(2) The council shall notify each city and county of its intent to assess and the amount it proposes to assess each city and county at least 120 days before the beginning of the fiscal year for which the charge will be made.

(3) The decision of the council to charge the cities and counties within the district, and the amount of the charge upon each, shall be binding upon those cities and coun-

ties. Cities and counties shall pay their charge on or before October 1 of the fiscal year for which the charge has been made.

(4) When the council determines that it is necessary to impose the service charges authorized under subsection (1) of this section for any fiscal year, each mass transit district organized under ORS chapter 267 and port located wholly or partly within the district shall also pay a service charge to the district for that fiscal year for the services and activities carried out under ORS 268.380 and 268.390. The charge for a mass transit district or port shall be the amount obtained by applying, for the population of the mass transit district or port within the boundaries of the district, a per capita charge that is 12-1/2 percent of the per capita rate established for cities and counties for the same fiscal year. Subsections (2) and (3) of this section apply to charges assessed under this subsection.

(5) This section shall not apply to a fiscal year that begins on or after July 1, 1993. [1977 c.665 §16; 1979 c.804 §10; 1991 c.353 §5; 1995 c.210 §1; 1999 c.327 §2]

ATTACHMENT B

Proposed FY 93  
Local Government Dues Assessment

I. Proposed Budget @ 43¢

Data Resource Center	\$1,286,565	\$281,425	22%
Model Refinement	1,050,735	18,998	1.8%
Local Technical Assistance	139,950	18,990	13.6%
RTP Update	210,550	11,555	5.5%
TIP	142,900	4,822	3.3%
Willamette River Br. Study	193,450	6,951	3.6%
* Region 2040 - Phase I	193,500	3,265	1.7%
** Region 2040 - Phase II	258,500	37,500	14.5%
Demand Management	140,600	10,060	7.2%
Air Quality Plan	92,500	9,250	10%
Regional HCT Plan	241,450	40,725	16.7%
Management & Coordination	197,000	<u>29,494</u>	15%
Transp. Dept. Subtotal		\$473,035	
Urban Growth Mgmt. (P & D)	\$411,000	<u>\$108,122</u>	26%
TOTAL		\$581,157	

\* Also includes carryover:

Dues . . . . .	\$ 31,250
Metro General Fund . . . . .	31,250
ODOT . . . . .	31,250
Tri-Met. . . . .	<u>31,250</u>
	\$125,000

\*\* Also includes:

Metro General Fund . . . . .	\$ 37,500
Tri-Met. . . . .	37,500
ODOT . . . . .	<u>37,500</u>
	\$112,500

II. Proposed RLIS support from PSU - \$35,000 . . . . 2.58¢

III. Potential Region 2040 enhancement up to maximum of 51¢  
 5.42¢ . . . . . \$ 73,122  
 8¢ . . . . . \$108,122

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF PROVIDING ) RESOLUTION NO. 92-1561C  
THE ASSESSMENT OF DUES TO LOCAL ) Introduced by Rena Cusma  
GOVERNMENTS FOR FY 1992-93 ) Executive Officer

WHEREAS, ORS 268.513 authorizes the Council of the Metropolitan Service District (Metro) to "charge the cities and counties within the District for the services and activities carried out under ORS 268.380 and 268.390"; and

WHEREAS, Metro Ordinance 84-180 requires the Metro Council to seek the advice of the Local Government Advisory Committee regarding the assessment of dues as authorized by ORS 268.513; and

WHEREAS, The Joint Policy Advisory Committee on Transportation (JPACT) and the Regional Policy Advisory Committee (RPAC) ~~was were~~ appointed as the Local Government Advisory Committees to review ~~Transportation Department~~ use of the local government dues by Resolution No. 90-1212 and this requirement has been fulfilled; now, therefore,

BE IT RESOLVED:

1. ~~[That the Metro Council hereby establishes local government dues assessment within the District in the amount of \$\_\_\_\_\_ per capita for FY 1992-93.]~~ That the Metro Council intends to assess local governments at a rate of up to \$.43 per capita and amounts shown on Exhibit A attached hereto. The Council will establish the final assessment rate and amount based upon deliberation on the FY 1992-93 budget.

2. That the Metro Council further requests a recommendation from RPAC and JPACT regarding the specific work program and

amount of the dues assessment during the budget process.

23. That notification of the assessment be sent to all cities and counties within the District, Tri-Met and the Port of Portland prior to March 3, 1992.

ADOPTED by the Metro Council this \_\_\_\_\_ day of February 1992.

Jim Gardner, Presiding Officer

92-1561C.RES  
ACC:lmk  
2-12-92

## EXHIBIT A

	POPULATION Estimate 1991	ASSESSMENT @.35/	ASSESSMENT @.43/	ASSESSMENT @.51/
<b>Clackamas County</b>				
Total In Metro	197783			
Gladstone	10420	\$3,647.00	\$4,480.60	\$5,314.20
Happy Valley	1650	\$577.50	\$709.50	\$841.50
Johnson City	610	\$213.50	\$262.30	\$311.10
Lake Oswego	31545	\$11,040.75	\$13,564.35	\$16,087.95
Milwaukie	19450	\$6,807.50	\$8,363.50	\$9,919.50
Oregon City	16760	\$5,866.00	\$7,206.80	\$8,547.60
Rivergrove	295	\$103.25	\$126.85	\$150.45
West Linn	17160	\$6,006.00	\$7,378.80	\$8,751.60
Wilsonville	8755	\$3,064.25	\$3,764.65	\$4,465.05
Unincorporated In Metro	91138	\$31,898.46	\$39,189.53	\$46,480.61
<b>Multnomah County</b>				
Total In Metro	592724			
Fairview	2590	\$906.50	\$1,113.70	\$1,320.90
Gresham	71225	\$24,928.75	\$30,626.75	\$36,324.75
Maywood Park	780	\$273.00	\$335.40	\$397.80
Portland	453065	\$158,572.75	\$194,817.95	\$231,063.15
Troutdale	8195	\$2,868.25	\$3,523.85	\$4,179.45
Wood Village	2930	\$1,025.50	\$1,259.90	\$1,494.30
Unincorporated In Metro	53939	\$18,878.80	\$23,193.96	\$27,509.11
<b>Washington County</b>				
Total In Metro	295718			
Beaverton	57290	\$20,051.50	\$24,634.70	\$29,217.90
Cornelius	6345	\$2,220.75	\$2,728.35	\$3,235.95
Durham	770	\$269.50	\$331.10	\$392.70
Forest Grove	13830	\$4,840.50	\$5,946.90	\$7,053.30
Hillsboro	39500	\$13,825.00	\$16,985.00	\$20,145.00
King City	2060	\$721.00	\$885.80	\$1,050.60
Sherwood	3305	\$1,156.75	\$1,421.15	\$1,685.55
Tigard	30835	\$10,792.25	\$13,259.05	\$15,725.85
Tualatin	16220	\$5,677.00	\$6,974.60	\$8,272.20
Unincorporated In Metro	125563	\$43,947.19	\$53,992.26	\$64,037.34
Total Local		\$380,179.20	\$467,077.30	\$553,975.41
Port of Portland		\$47,522.40	\$58,384.66	\$69,246.93
Tri-Met		\$47,522.40	\$58,384.66	\$69,246.93
<b>TOTAL ASSESSMENT</b>		<b>\$475,224.00</b>	<b>\$583,846.63</b>	<b>\$692,469.26</b>

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 92-1561 FOR THE PURPOSE OF PROVIDING THE ASSESSMENT OF DUES TO LOCAL GOVERN- MENTS FOR FY 1992-93

Date: January 29, 1992

Presented by: Andrew Cotugno

## FACTUAL BACKGROUND AND ANALYSIS

### Assessment Authorization and Procedure

ORS 268.513 (Attachment A) authorizes the Metro Council to:

"charge the cities and counties within the District for the services and activities carried out under ORS 268.380 and 268.390."

If the Council follows the recommendation of the Local Government Advisory Committee and determines that it is necessary to charge these local governments, it must establish the total amount to be charged and assess each city and county on the basis of population. The assessment cannot exceed \$.51 per capita per year.

In making the assessment, the Council is required to notify each city, county, Tri-Met and the Port of Portland of its intent to assess and the amount of the assessment at least 120 days before the beginning of the fiscal year for which the charge will be made. The notification for the FY 1991-92 assessment must be made prior to March 3, 1992. Assessments must be paid before October 1, 1992.

TPAC reviewed the proposed dues assessment at its meeting on January 31 and deferred action until its special February 12 meeting to allow further review of jurisdictional budgets prior to its recommendation.

### Proposed FY 1991-92 Assessment

Attachment B shows the population figures and proposed dues assessment schedule. The values are based upon the latest certified population figures from the Center for Population Research and Census at Portland State University. Each county's unincorporated population estimate is based upon data provided by the Center for Population Research and Census using a formula devised by Metro staff (Attachment C).

The maximum assessment at \$.51 per capita for cities and counties and at 12.5 percent of that rate for Tri-Met and the Port of Portland is \$689,280. In the FY 91-92 budget, the actual dues assessment was approved at \$.43 which in FY 92-93 would be

\$581,158. The Transportation and Planning and Development Departments' proposed budgets are based upon continuation of this \$.43 level. However, options for a higher level assessment are presented in Attachment C.

Use of the dues assessment for the Transportation Department and the Planning and Development Department at a \$.43 level generally falls into the following major categories:

1. Grant Match - \$150,845 - The dues plus ODOT and Tri-Met local match are used to leverage federal funding toward Transportation Planning. The program areas, which must be approved in the FY 92 Unified Work Program, include:

- Model Refinement
- Local Technical Assistance
- Regional Transportation Plan Update
- Transportation Improvement Program
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- Air Quality Plan
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- Management and Coordination

2. Data Resource Center - \$281,425 - The Data Resource Center publishes periodic updates of historical and forecasted population and employment growth throughout the Portland metropolitan area. In addition, the Regional Land Information System (RLIS) is operational and provides land use-related data. Funding sources for the Data Resource Center include dues, transportation grants, solid waste fees and Metro's General Fund. In general, the dues share is approximately 25 percent of the Data Section budget. Revenues collected from data sales are used to reduce the dues share of this budget.
3. Region 2040/Urban Growth Management - \$148,887 - The Transportation Department and Planning and Development Department are jointly sponsoring the Region 2040 program. In addition, associated projects relating to urban reserves and infill are underway. Other funding sources in the program include Metro General Fund, Tri-Met and ODOT.

#### EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends adoption of Resolution No. 92-1561.

ATTACHMENT A

268.513 Service charge for planning functions of district. (1) The council shall consult with the advisory committee appointed under ORS 268.170 before determining whether it is necessary to charge the cities and counties within the district for the services and activities carried out under ORS 268.380 and 268.390. If the council determines that it is necessary to charge cities and counties within the district for any fiscal year, it shall determine the total amount to be charged and shall assess each city and county with the portion of the total amount as the population of the portion of the city or county within the district bears to the total population of the district provided, however, that the service charge shall not exceed the rate of 51 cents per capita per year. For the purposes of this subsection the population of a county does not include the population of any city situated within the boundaries of that county. The population of each city and county shall be determined in the manner prescribed by the council.

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(4) When the council determines that it is necessary to impose the service charges authorized under subsection (1) of this section for any fiscal year, each mass transit district organized under ORS chapter 267 and port located wholly or partly within the district shall also pay a service charge to the district for that fiscal year for the services and activities carried out under ORS 268.380 and 268.390. The charge for a mass transit district or port shall be the amount obtained by applying, for the population of the mass transit district or port within the boundaries of the district, a per capita charge that is 12-1/2 percent of the per capita rate established for cities and counties for the same fiscal year. Subsections (2) and (3) of this section apply to charges assessed under this subsection.

(5) This section shall not apply to a fiscal year that begins on or after July 1, 1993. [1977 c.665 §16; 1979 c.804 §10; 1981 c.353 §5; 1985 c.210 §1; 1989 c.327 §2]



## ATTACHMENT B

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ATTACHMENT C

Proposed FY 93  
Local Government Dues Assessment

I. Proposed Budget @ 43¢

Data Resource Center	\$1,286,565	\$281,425	22%
Model Refinement	1,050,735	18,998	1.8%
Local Technical Assistance	139,950	18,990	13.6%
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TIP	142,900	4,822	3.3%
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Management & Coordination	197,000	<u>29,494</u>	15%
Transp. Dept. Subtotal		\$473,035	
Urban Growth Mgmt. (P & D)	\$411,000	<u>\$108,122</u>	26%
TOTAL		\$581,157	

\*Also includes carryover:

Dues . . . . .	\$ 31,250
Metro General Fund . . . . .	31,250
ODOT . . . . .	31,250
Tri-Met. . . . .	<u>31,250</u>
	\$125,000

\*\*Also includes:

Metro General Fund . . . . .	\$ 32,500
Tri-Met. . . . .	37,500
ODOT . . . . .	<u>37,500</u>
	\$112,500

II. Proposed RLIS support from PSU - \$50,000 . . . 3.7¢

III. Potential Region 2040 enhancement up to maximum of 51¢	
4.3¢ . . . . .	\$ 58,122
8¢ . . . . .	\$108,122

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF PROVIDING ) RESOLUTION NO. 92-1561  
THE ASSESSMENT OF DUES TO LOCAL ) Introduced by Rena Cusma  
GOVERNMENTS FOR FY 1992-93 ) Executive Officer

WHEREAS, ORS 268.513 authorizes the Council of the Metropolitan Service District (Metro) to "charge the cities and counties within the District for the services and activities carried out under ORS 268.380 and 268.390"; and

WHEREAS, Metro Ordinance 84-180 requires the Metro Council to seek the advice of the Local Government Advisory Committee regarding the assessment of dues as authorized by ORS 268.513; and

WHEREAS, The Joint Policy Advisory Committee on Transportation was appointed as the Local Government Advisory Committee to review Transportation Department use of the local government dues by Resolution No. 90-1212 and this requirement has been fulfilled; now, therefore,

BE IT RESOLVED:

1. That the Metro Council hereby establishes local government dues assessment within the District in the amount of \$\_\_\_ per capita for FY 1992-93.

2. That notification of the assessment be sent to all cities and counties within the District, Tri-Met and the Port of Portland prior to March 3, 1992.

ADOPTED by the Metro Council this \_\_\_\_\_ day of February 1992.

Jim Gardner, Presiding Officer

92-1561.RES  
ACC:lmk  
1-19-92

FEB 4 1992

**LEVEL BOARDING FOR MAX**

**Development and Evaluation of Options**

**DRAFT**

for

Tri-Met

**DRAFT**

by the Independent Consulting Team of

**LTK ENGINEERING SERVICES  
ZIMMER GUNSUL FRASCA PARTNERSHIP  
ICF KAISER ENGINEERS  
ENVIRONMENTAL ACCESS INC.  
DONALD L. MACDONALD, P.ENG.**

**DRAFT PROJECT REPORT**

**February 4, 1992**

## **EXECUTIVE SUMMARY**

In April 1991 by the Portland Planning Commission, Portland City Council, Metro Council, and Tri-Met Board of Directors adopted resolutions requiring level boarding for Westside MAX. In September 1991, Tri-Met's Committee on Accessible Transportation (CAT) recommended an independent consultant study of level boarding.

The term "level boarding" refers to boarding MAX light rail vehicles without using steps or lifts. The wayside lifts on Eastside MAX to raise users -- primarily in wheelchairs -- to the level of the car floor. Therefore, wayside lifts do not provide level boarding.

### **COMMUNITY INVOLVEMENT AND COORDINATION**

Because the study originated in response to keen community interest in level boarding, a concerted effort has been made to involve community groups during all phases of its preparation.

Two sets of meetings were conducted with interested community groups. A first round of sessions in November was organized around a slide show describing the problem and depicting major solutions under study. In February, a second series of meetings is seeking comment on draft recommendations.

The focus of community involvement during the study is the Walsh Advisory Committee, a group convened by Tri-Met General Manager Tom Walsh to provide guidance to the consultants.

### **LEVEL BOARDING STUDY GOAL**

Tri-Met's ultimate goal is to provide a regional light rail system offering a high level of access and service to all users.

### **PRIMARY ALTERNATIVES**

Three primary alternatives are developed and examined in the study report:

- ◆ Mini-high platforms - level

boarding, operator-assisted, at front door of train only; retractable ramp to bridge and horizontal gap between car and platform

- ◆ Full-length high platforms - level boarding, unassisted, at all doors, but with short vertical gap (less than 5/8 inches, and within legal requirements)
- ◆ Low-floor light rail vehicles - unassisted level or near-level boarding, with or without gap, at some or all doors.

## **BACKGROUND RESEARCH**

Research conducted by the study team consisted of three components: a review of transit industry technical literature, field inspections of other North American and European light rail systems using one of the primary level boarding technologies under study, and discussions with light rail vehicle manufacturers.

Further information on development of

goals, objectives, and the study context boarding must fit in Portland is provided in Section I, Introduction. Summaries of research conducted, the community and involvement process, and the use of information from both to describe MAX level boarding options are presented in Section II, Study Process.

Based on the research program and community input received during the initial round of meetings with interested agencies, organizations and individuals, the most critical issues to be faced for each of the primary level boarding alternatives are:

- ◆ **Mini-high platforms** - Provide less than universal level boarding
- ◆ **Full-length high platforms** - Engender significant urban impacts, particularly in downtown Portland
- ◆ **Low-floor light rail vehicles** - Developmental for North America, thus involve relatively high technical, cost and procurement risks

## SPECIFIC OPTIONS EXAMINED

The report provides detailed analyses and evaluations of level boarding options having desirable characteristics. All alternatives provide for through operation between East- and Westside lines:

- ◆ Mini-High Platforms on Westside only (Alternative M-1), with bridge plates on the platforms; continue use of wayside lifts on Eastside and in downtown Portland; no special equipment on new or existing vehicles
- ◆ Mini-High Platforms at both new Westside stations and replacing lifts at all Eastside and downtown stations (Alternative M-2); trapdoors and bridgeplates built into new cars and added to existing light rail vehicles
- ◆ Full-Length High Platforms on Westside only (Alternative F-1); continue use of wayside lifts on Eastside and in downtown Portland; new cars delivered with movable steps at all entries and sliding or sliding-plug doors;
- ◆ existing cars modified with movable steps and exterior sliding or sliding-plug doors
- ◆ Full-Length High Platforms at new Westside stations and replacing low platforms at Eastside and downtown stations (Alternative F-2); new cars delivered for high-level boarding; existing LRVs modified (stepwells covered, doors changed as above)
- ◆ Low-Floor Light Rail Vehicles are articulated (Alternative L-1), fully compatible with existing cars, which existing LRVs do not run alone; lifts removed from all stations
- ◆ New cars are non-articulated (Alternative L-2); fully compatible to operate in service with Type 1 MAX LRVs in trains 150 feet long. All-new trains use three new cars to create trains filling station platforms

## ANALYSIS AND EVALUATION OF MAX LEVEL BOARDING OPTIONS

Evaluation of each option included:

- ◆ Analysis and selection of required physical improvements to existing light rail vehicles, stations and other transit system facilities and equipment,
- ◆ Assessment of compliance with requirements of the 1990 Americans with Disabilities Act,
- ◆ Consideration of operational impacts and benefits,
- ◆ Evaluation of how options can be integrated into the urban environment,
- ◆ Estimates of incremental capital and operating costs, together with impacts on the Westside Light Rail Project schedule, and
- ◆ Discussion of other technical and institutional risks and uncertainties.

These analyses are presented in Section III, Development of Alternatives, and Section IV, Evaluation of Options.

## System Improvements Required

Physical improvements to accommodate level boarding will be needed for all alternatives. Categories of assets requiring modification or replacement include new and existing light rail vehicles, passenger stations (platforms and, for some options, other station furnishings and equipment), and other light rail system elements such as: storage and maintenance facilities, and/or wayside clearances.

## Operating Improvements Desired

Without question, the recommended option(s) must comply with the requirements of the 1990 Americans with Disabilities Act and its implementing regulations.

In addition, the consensus of the Walsh Advisory Committee is that the ultimate goal for MAX is "system-wide universal level boarding", i.e., stepless boarding at every station of every train and every car at every door. Therefore, it is necessary to evaluate each level boarding option in



light of that goal:

- ◆ Achievement of universal level boarding, or
- ◆ Establishment of a program to reach this goal over time, and
- ◆ Selection of a single MAX level boarding technology for use system-wide.

Level boarding should be implemented in a way that enhances the overall operating efficiency of MAX. Removing for wayside lifts, which lengthen vehicle stopping (dwell) time, will be the primary operating benefit.

As the system moves toward universal level boarding and fewer passengers are required to use steps, all passengers will benefit and station dwell times can be further reduced. Whether from full high platforms or with low-floor vehicles, universal level boarding will significantly improve service, not only for riders using mobility aids, but for the entire riding public. Without steps at vehicle entries, boarding and alighting will be faster, station stops shorter, and service more

reliable. The MAX system will be easier for riders to use, and easier for Tri-Met to operate.

### Community and Environmental Impacts

The three primary alternatives affect the urban community, particularly downtown Portland, in drastically different degrees.

High platforms are a major addition to the streetscape and have significant impacts, particularly in downtown Portland. Mini-high platforms and low-floor vehicles (to the extent they may require reconstruction/modification of platforms) will be less intrusive, both during construction and in service. Community and urban design impacts are much less critical outside downtown Portland; and effects on the natural environment are few.

### Implementation Risks

All level boarding alternatives entail risks and uncertainties: technical, cost, schedule and/or institutional.

There is little doubt that successful installation of the more conventional primary options -- mini-high and full-length high platforms -- is most threatened by institutional concerns:

codes (M-1, etc.).

- ◆ Mini-High Platforms:  
Acceptability to users
- ◆ Full-Length High Platforms:  
Acceptability to downtown  
authorities and commercial  
interests

Procurement of low-floor cars appears to be possible, but will involve several significant technical, procurement and schedule risks. Technical risks can be limited to some extent by carefully applying only those design techniques necessary to meet agency goals and objectives.

### Summary of Analyses

Table S-1 summarizes how each option evaluated in the body of the report performs in meeting the overall study goal and objectives. Please refer back to page ES-3 to identify the alternatives'

**TABLE S-1: SUMMARY OF LEVEL BOARDING ALTERNATIVES  
CONFORMITY WITH TRI-MET GOAL AND OBJECTIVES  
AND CAPITAL COSTS TO IMPLEMENT**

ITEM	MINI-HIGH		FULL HIGH		LOW-FLOOR LRVs	
	M-1	M-2	F-1	F-2	L-1	L-2
<b>GOAL:</b>	No	No	West only	Yes	Yes	Yes
Offer high level of access and service to all users.						
<b>OBJECTIVES:</b>						
Achieve, or establish a program to achieve over time, universal level boarding.	No	No	Yes	Yes	Yes	Yes
Select one level boarding technology to avoid passenger confusion.	No	Yes	No	Yes	Yes	Yes
Apply only modest levels of technical innovation to limit Tri-Met risks	Yes	Yes	No	Yes	No	Yes
Improve quality of service for all riders and streamline LRT operations: • Improve service quality for all riders • Streamline LRT operations	No No	No No	West only West only	Yes Yes	Yes Some	Some Some
Enhance urban community, minimize negative impacts on residents, businesses, traffic and environment: • During construction • After completion	Yes Yes	Some Some	No No	No No	Yes Yes	Yes Yes
Maintain adopted Westside LRT Project: • Schedule • Incremental \$Mill to PE Plan (M-1)	Yes —	Maybe \$5.62	Maybe \$26.11	Maybe \$33.97	No \$26.26	No \$32.15
Accommodate existing and future LRVs and additional regional LRT lines	Yes	Yes	Maybe	Yes	Yes	Yes

## **DRAFT RECOMMENDATIONS OF THE ADVISORY COMMITTEE LEVEL BOARDING FOR MAX STUDY**

After considering the study's analysis, evaluation and conclusions, the advisory committee has recommended that Tri-Met pursue a course comprised of these steps:

- State Tri-Met's preference for adopting low-floor light rail vehicles as the single level-boarding technology for the MAX system.
- Further assess the type of low-floor vehicle best suited for the MAX system, after discussions with carbuilders, and prepare a revised set of specifications and procurement schedule.
- Design Westside light rail station platforms for use with the recommended low-floor cars, and modify Eastside platforms and other facilities to accommodate low-floor cars when they are placed in service.
- Determine a plan for funding the additional costs of 39 low-floor cars and associated facilities, and seek regional consensus in support of this plan.

**LEVEL BOARDING FOR MAX**

**\*\*\*\*\* SUMMARY FOR PUBLIC PRESENTATIONS \*\*\*\*\***

**Development and Evaluation of Options**

prepared for

**Tri-County Metropolitan Transportation District of Oregon**

by the Independent Consulting Team of

**LTK ENGINEERING SERVICES  
ZIMMER GUNSUL FRASCA PARTNERSHIP  
ICF KAISER ENGINEERS  
ENVIRONMENTAL ACCESS INC.  
DONALD L. MACDONALD, P.ENG.**

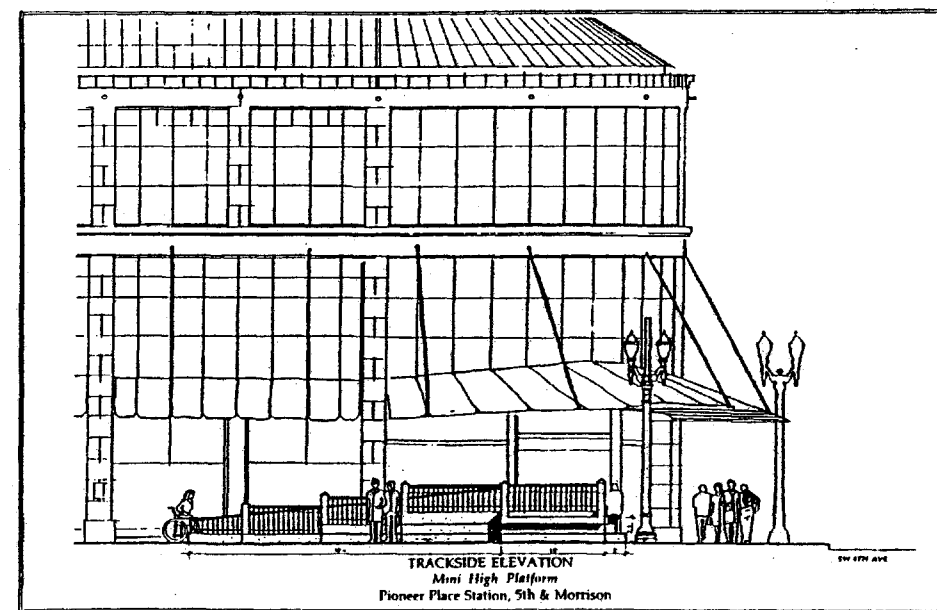
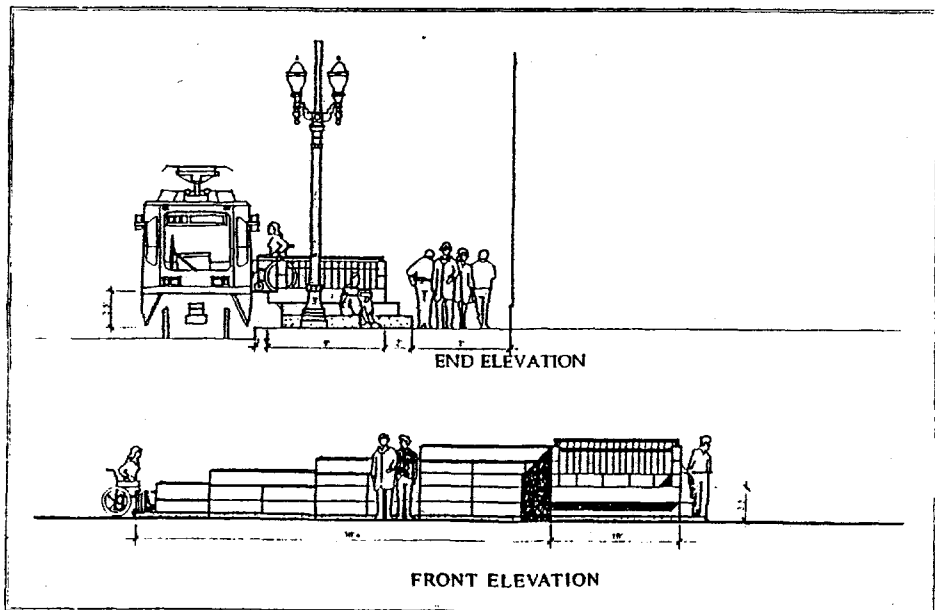
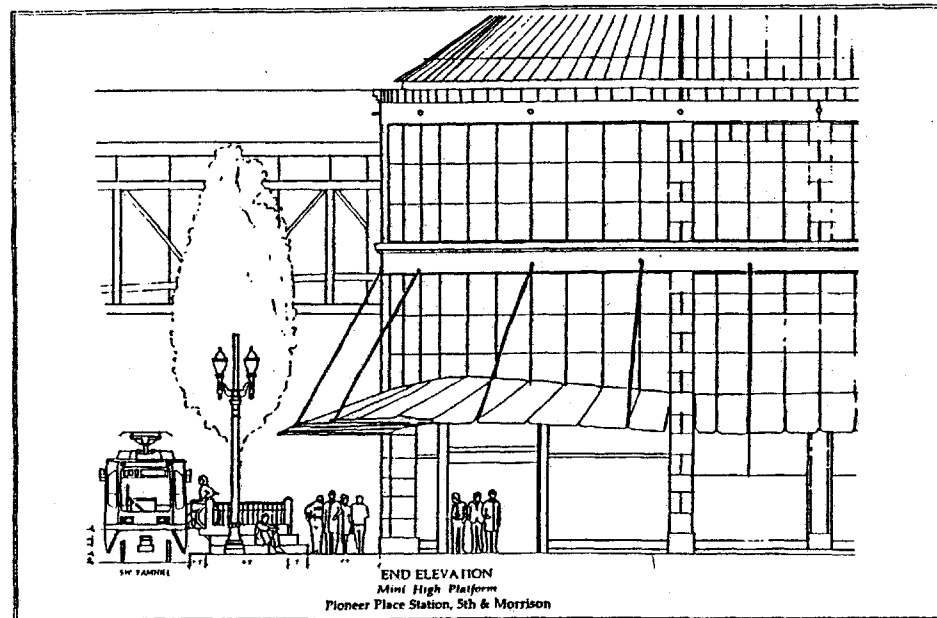
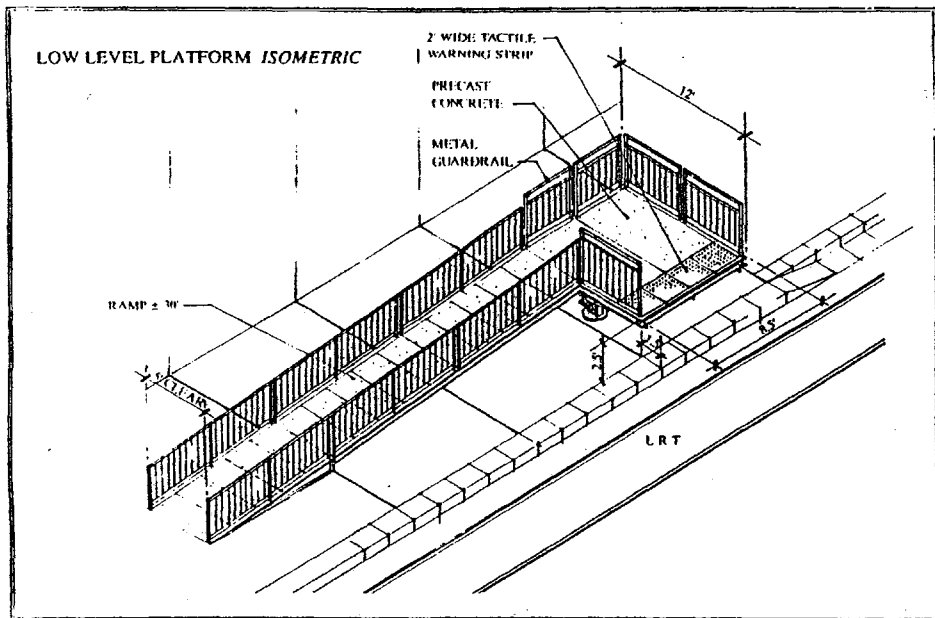
**DRAFT PROJECT REPORT**

**February 11, 1992**

## **ACCESSIBILITY STUDY PROCESS**

- ◆ **Survey available solutions -- North America, Europe**
- ◆ **Full, open-minded analysis of options:**
  - **Full-length high platforms**
  - **Mini-high platforms**
  - **Low-floor light rail vehicles**
- ◆ **Frequent contact with interested groups, individuals**

**FIGURE ES-1: MINI-HIGH PLATFORM CONCEPTS**



**FIGURE ES-2: FULL-LENGTH HIGH PLATFORM CONCEPTS**

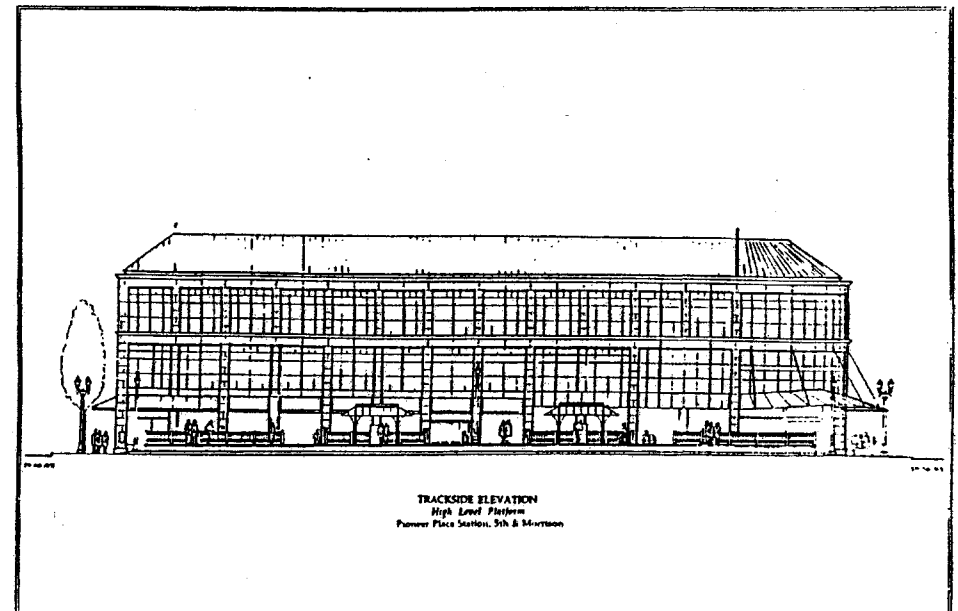
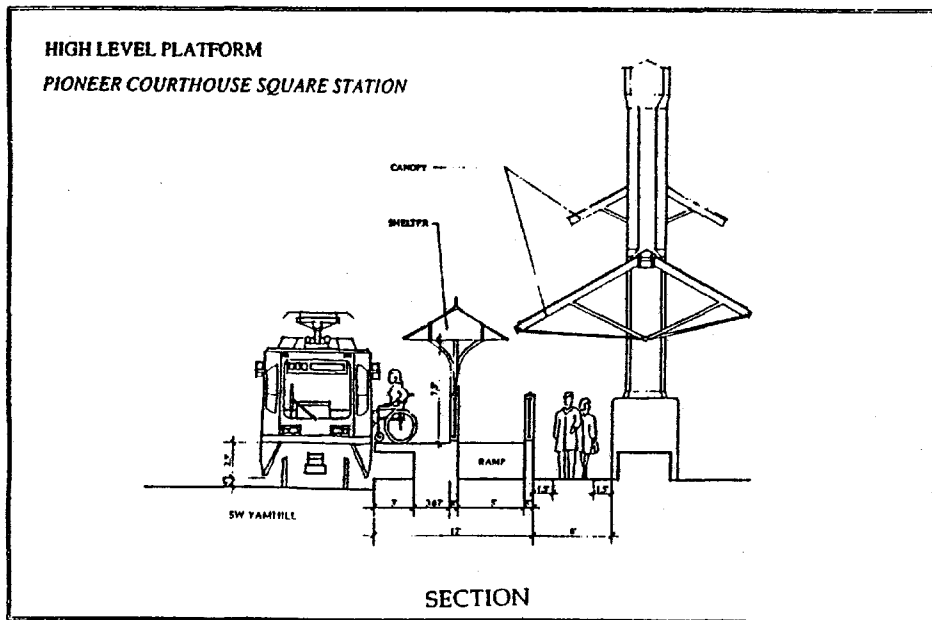
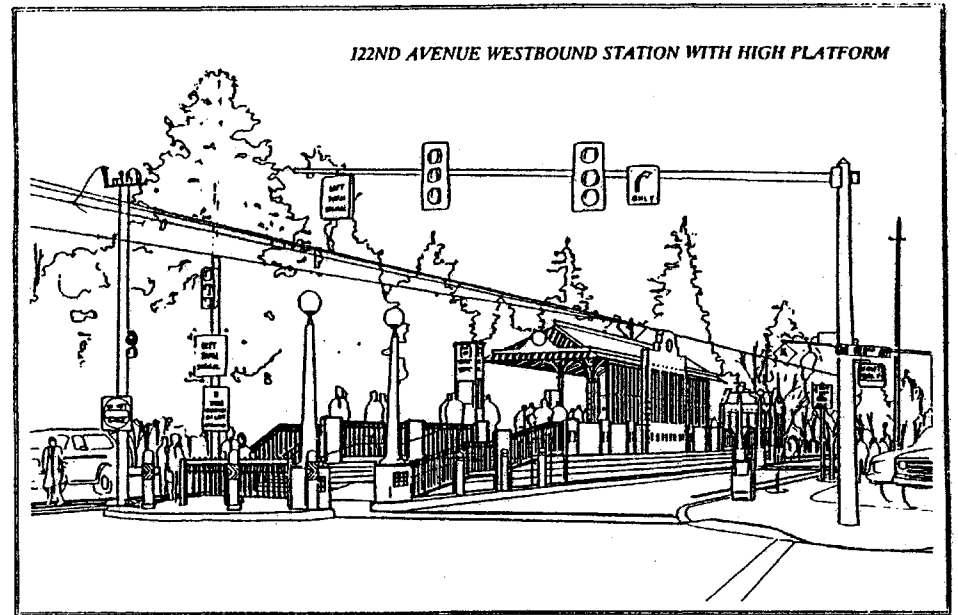
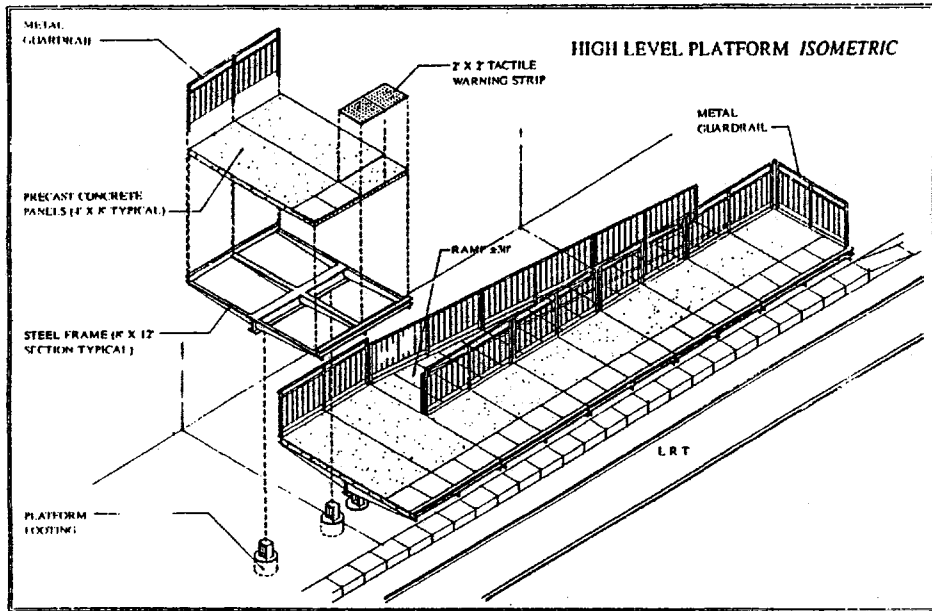
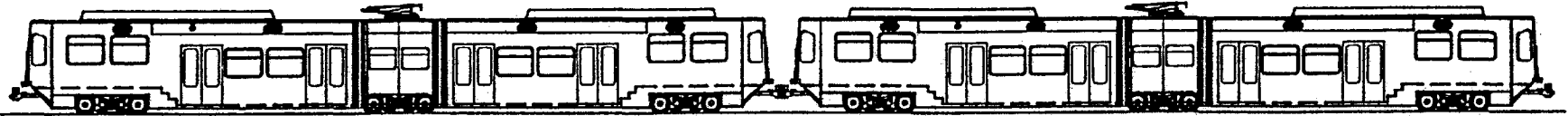
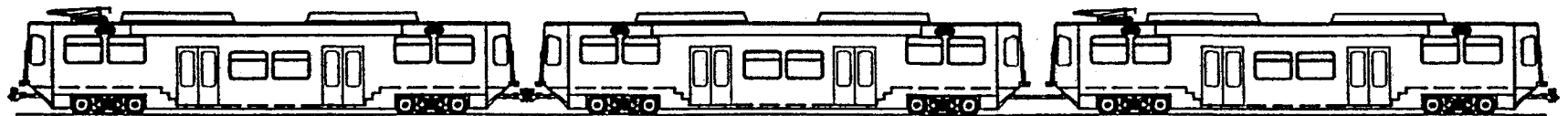




FIGURE ES-3: LOW-FLOOR LIGHT RAIL VEHICLE CONCEPTS



164 SEATS PER TRAIN



180 SEATS PER TRAIN

**MAJOR ISSUES RELATED TO PRIMARY ALTERNATIVES  
FOR MAX LEVEL BOARDING**

<b>KEY CHARACTERISTICS</b>	<b>MINI-HIGH PLATFORMS</b>	<b>FULL HIGH PLATFORMS</b>	<b>LOW-FLOOR VEHICLES</b>
<b>Establish Program for Full Level Boarding</b>	No	Yes	Yes
<b>Minimize Permanent Urban Impacts</b>	Yes	No	Yes
<b>Minimize Technical Risks to Westside Light Rail Project</b>	Yes	Yes	No

## **PRIMARY LEVEL BOARDING ALTERNATIVES AND SUB-OPTIONS**

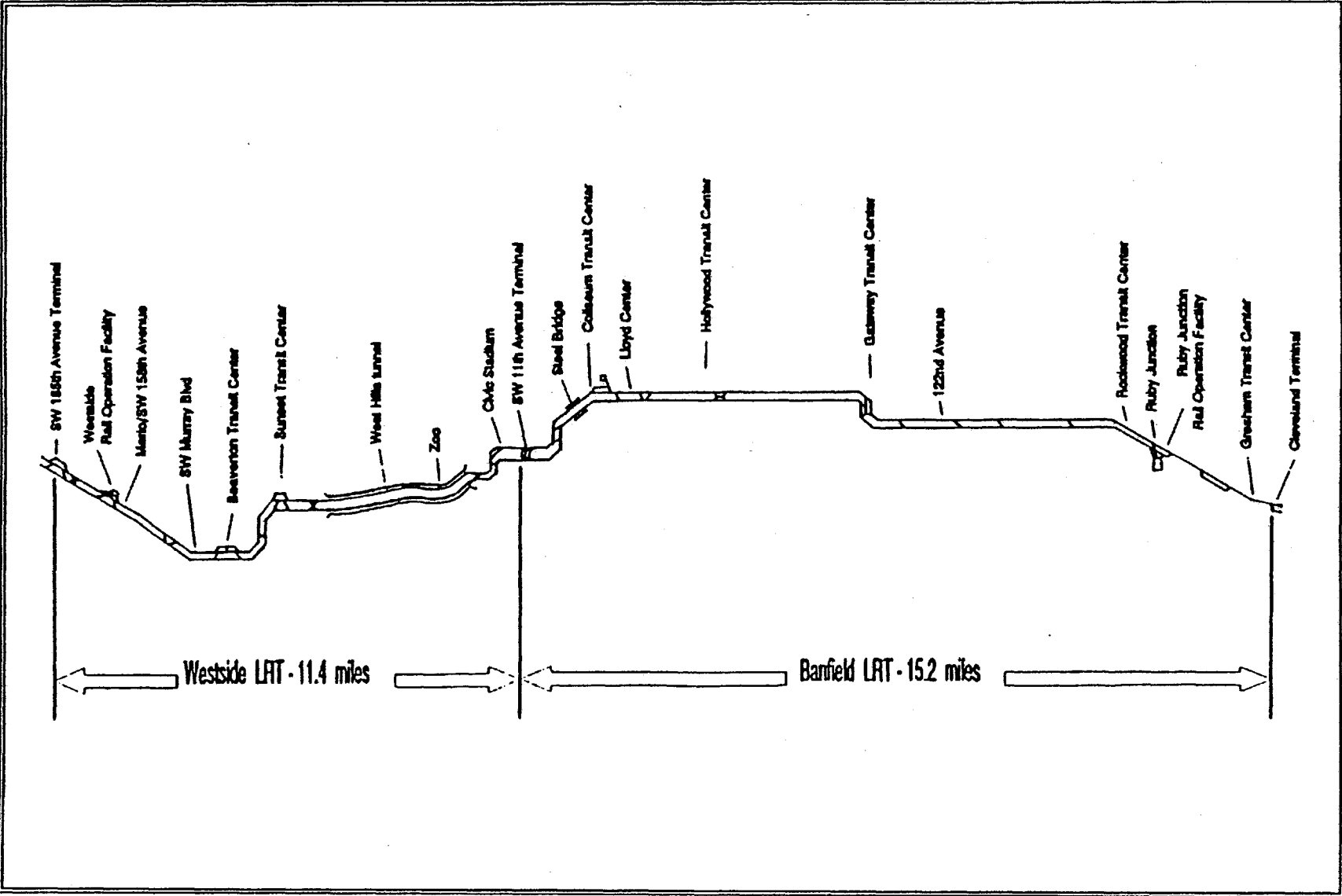
- ◆ **MINI-HIGH PLATFORMS:**
  - M-1, Westside only
  - M-2, Westside and Eastside
  
- ◆ **FULL-LENGTH HIGH PLATFORMS:**
  - F-1, Westside only
  - F-2, Westside and Eastside
  
- ◆ **LOW-FLOOR LIGHT RAIL VEHICLES:**
  - L-1, Articulated Cars
  - L-2, Non-Articulated Cars

**TABLE 4-1: SUMMARY OF PHYSICAL IMPROVEMENTS FOR LEVEL BOARDING ALTERNATIVES**

ITEM	MINI-HIGH		FULL HIGH		LOW-FLOOR LRV	
	M-1	M-2	F-1	F-2	L-1	L-2
Principal Facility Changes New LRV Type	West #2	Both #2	West #2(a)	Both #2(a)	Both LFV-3	Both LFV-5/5A
<b>STATIONS:</b>						
Westside Stations, Build: Mini-High Pltfrms Full High Pltfrms	X	X	X	X		
Eastside Stations, Build: Mini-High Pltfrms Full High Pltfrms Raise Existing (If Needed)		X		X	X	X
Wayside Lifts: Remove Eastside Retain Eastside Add Westside	X	X	X	X	X	X
<b>LIGHT RAIL VEHICLES:</b>						
LRV Trapdoors/Bridgeplates: Install in New Cars Retrofit Existing LRVs		X X				
Movable Steps/Sliding Doors: Install in New Cars Retrofit Existing LRVs			X X			
Sliding Doors/Flat Floors: Install in New Cars Retrofit Existing LRVs				X X		
Low-Floor LRVs & Facilities: Purchase Low-Floor LRVs Modify Yards & Shops Modify Wayside Clearances					X X	X X X

(a) Modified for high level loading as indicated under Light Rail Vehicles

FIGURE 3-7: EAST-WEST MAX SYSTEM, MAINLINE TRACK SCHEMATIC



**LEVEL BOARDING SUB-OPTIONS RELATED TO STUDY OBJECTIVES**

<b>OBJECTIVES</b>	<b>MINI-HIGH PLATFORMS</b>		<b>FULL HIGH PLATFORMS</b>		<b>LOW-FLOOR CARS</b>	
	<b>M-1</b>	<b>M-2</b>	<b>F-1</b>	<b>F-2</b>	<b>L-1</b>	<b>L-2</b>
<b>Establish Full Level Boarding (LB) Program</b>	No	No	Yes	Yes	Yes	Yes
<b>Provide Consistent LB Access, West &amp; East</b>	No	Yes	No	Yes	Yes	Yes
<b>Degree of Technical Innovation Required</b>	Low	Low	High	Medium	High	Medium
<b>MAX Infrastructure Changes Required</b>	Low	Low	Low	High	Low	High
<b>Permanent Urban Impacts after Completion</b>	Low	Low	High	Very High	Low	Low
<b>Maintain Westside LRT Schedule &amp; Budget</b>	Yes	No	No	No	No	No

**ESTIMATED CAPITAL COSTS OF SUB-OPTIONS  
FOR ELEMENTS RELATED TO LEVEL BOARDING**

(Millions of 1992 Dollars)

PRIMARY CAPITAL COST CATEGORIES	MINI-HIGH PLATFORMS		FULL HIGH PLATFORMS		LOW-FLOOR CARS	
	M-1	M-2	F-1	F-2	L-1	L-2
Light Rail Vehicles	\$ 80.3	\$ 81.9	\$ 92.9	\$ 85.0	\$ 97.5	\$ 98.6
MAX Stations	1.6	3.9	6.9	20.2	2.9	2.9
Other MAX Facilities	--	--	--	--	2.0	5.1
Admin/Engrng/Contingency	<u>15.2</u>	<u>17.0</u>	<u>23.4</u>	<u>25.9</u>	<u>21.0</u>	<u>22.7</u>
Total Estimated Capital	\$ 97.1	\$102.8	\$123.2	\$131.1	\$123.4	\$129.3
Increase re P.E. Plan (M-1)	--	\$ 5.7	\$ 26.1	\$ 34.0	\$ 26.3	\$ 32.2

## **MAX ACCESS STUDY CONCLUSIONS**

The challenge facing Tri-Met and the greater Portland community is to identify and select a MAX level boarding package balancing ADA requirements, local expectations and aspirations, the civic consensus on what fits Portland's urban character, and the state of light rail technology readiness:

### ♦ **Mini-high platforms:**

- Cheap and operationally effective
- Can satisfy the letter of ADA mandates, but not local expectations
- Downtown streetscape impacts are a concern

### ♦ **Full-length high platforms:**

- Costly, but operationally effective if implemented systemwide
- Meet ADA regulations and local universal level boarding expectations -- if air suspension on cars
- Movable step sub-option is undesirable
- Construction on Eastside under traffic is difficult
- Impacts on downtown streetscape are essentially unacceptable

### ♦ **Low-Floor Light Rail Vehicles:**

- More costly than mini-high platforms, but probably less than full high platforms
- Technically risky, as no design(s) suitable for North America are available "off-the-shelf"
- Meet ADA and local expectations
- Set program to achieve universal level boarding in time, with acceptable urban impacts
- Level boarding operating advantages without the urban impacts of high platforms on streets



## ISTEA HIGHWAY PROGRAM

(Six year authorization for six year period from Feb. 1992 through 1997.)

### National Highway System (NHS)

- Newly defined 155,000(+/- 15%) miles.
- Proposed by state in cooperation with local officials.
- Congressional approval by Sept. 30, 1995.
- Eligible projects include construction, reconstruction, resurfacing, restoration and rehabilitation. In addition safety and operational improvements, start-up costs for traffic management plans, transportation planning, development of management systems and transit projects on NHS route are eligible (or adjacent corridor highway and transit projects if improvements have comparable benefits to those of NHS route.).
- Federal Share - 80%. (90% to 100% for certain projects)
- Transferability - 50% of funds can be transferred by state to Surface Transportation Program (STP) (or 100 percent if approved by U.S. Secretary of Transportation.)

### Interstate Maintenance

(Replaces 1-4R with 3R program)

- Eligible projects include reconstruction but can not add capacity unless primary use is high occupancy lanes.
- Preventive maintenance eligible if cost effective.
- Federal share - 90%.

### Interstate Completion

(This is to be last completion authorized.)

- Funded to completion in five years.
- Discretionary component is available.
- Federal share 90%. (80% if add general vehicle lanes)

Interstate Substitution Highway Program  
(Continued for four years.)

- Funds made available until expended.
- Federal share - 85%.
- (Not known if we can switch between highway and transit under new act.)

Surface Transportation Program  
(Consolidates secondary, urban, primary construction programs)

- Eligible roads (including NHS) that are not functionally classified as local or rural minor collection.
- Eligible improvements include construction, 4R including interstate operational improvements, transit capital costs, safety improvements, transportation planning, transportation control measure, transportation enhancement activities, parking, carpool, bicycle and pedestrian walkway projects.
- Federal share - 80%. (90% max 95% if used for certain projects)

Congestion Mitigation and Air Quality  
(Congestion mitigation program funding may not be used for construction of single occupancy vehicle capacity.)

- Eligible improvements must contribute to attainment of air quality standard.
- Federal share - 80%. (90% - 95% maximum)
- If in attainment areas, funds are eligible for STP activities.

Bridge Replacement and Rehabilitation

- Basically unchanged from previous years.
- 40% of funds can be transferred to NHS or STP.
- Federal share - 80%.

FUNDING CATEGORY	FFY 91	FFY 92	FFY 93	FFY 94	FFY 95	FFY 96	FFY 97
<b>FEDERAL HIGHWAY PROGRAM</b>							
Interstate Construction	\$27.20	\$23.31					
Interstate Maintenance	\$37.66	\$35.15	19.83%	19.87%	19.87%	19.87%	19.87%
National Hwy. System	\$29.17	\$34.55	19.85%	19.85%	19.85%	19.88%	19.88%
Surface Transp. Program	\$21.48	\$34.12	19.84%	19.84%	19.84%	19.87%	19.87%
10% Safety	\$4.57	\$3.41					
10% Enhancement	\$0.00	\$3.41					
Portland Region (1)	\$3.80	\$7.04					
Balance of State (2)	\$13.11	\$10.02					
Anywhere in State	\$0.00	\$10.24					
Congestion/ Air Quality	\$0.00	\$4.43	19.81%	19.81%	19.81%	19.93%	19.93%
Bridge	\$7.79	\$25.17	20.72%	20.72%	20.72%	20.76%	20.76%
Interstate Transf. Hwy.	\$11.66	\$2.37	same	same	same	gone	gone
Minimum Allocation	\$13.59	\$1.26	19.81%	19.81%	19.81%	19.81%	20.05%
Donor State Bonus	\$0.00	\$6.81					
Apportionment Adjustment	\$0.00	\$22.28	same	same	same	same	same
	\$13.59	\$30.35					
Allocated to State		\$15.18					
10% Safety		\$1.52					
10% Enhancement		\$1.52					
Portland Region STP		\$3.13					
Bal. of State STP		\$4.46					
Anywhere in State STP		\$4.55					
Metropolitan Planning	\$0.432	\$0.986					
Metro	\$0.235	\$0.483					
Other MPOs	\$0.197	\$0.503					
Demo Projects	\$1.27	\$3.68					
	\$150.68	\$195.10					
<b>FEDERAL TRANSIT PROGRAM</b>							
Section 9 - Cap. & Opera	\$12.40	\$13.58	42.87%	44.98%	44.98%	44.98%	105.24%
Portland	\$11.16	\$12.22					
Vancouver	\$1.24	\$1.36					
Section 9 Operating			CPI	CPI	CPI	CPI	CPI
Portland	\$4.84	\$4.40					
Vancouver	\$0.00	\$0.00					
Section 8 Plng. - Oregon		\$316,325	61.75%	58.37%	58.37%	58.37%	124.03%
Section 8 Plng. - Metro	\$209,000	\$220,000					
Section 3			51.25%	52.74%	52.74%	52.74%	116.10%
Bus	\$220.0	\$268.0					
New Starts	\$440.0	\$537.0					
Rail Mod.	\$455.0	\$537.0					
Interstate Transfer - Transit		\$160.0	3.03%	gone	gone	gone	gone

(1) FFY 91 Portland Region FAU = \$3.8 m.  
Balance of E(4) Hwy. to go = \$9.6m.

(2) Balance of state FAU = \$3.3; FAS = \$9.81  
Balance of E(4) Transit to go = \$16.5m.



**METRO**

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

# Memorandum

## DRAFT

Date: February 12, 1992  
To: ODOT  
From: JPACT  
Re: ODOT Six-Year Transportation Improvement Program

We have reviewed the Draft program in anticipation of the upcoming hearings and find it very difficult to evaluate due to the current circumstances. The process was initiated well before Congress adopted the new Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA). As such, it was developed on the basis of the Act submitted by the President which was considerably different than the final adopted version. In particular, although the ISTEA produced \$386.7 million of increased funds over the previous STA, the Draft program is based upon \$173 million more than is now expected to be available during the next six years.

The adopted ISTEA is responsive to many of the initiatives recommended by the Portland region to introduce greater flexibility to fund needed improvements and provide for integration with land use and environmental concerns. It is an opportunity that we worked hard to achieve and is consistent with the multi-modal direction set in the Regional Transportation Plan and the Oregon Transportation Plan. It allows the new "National Highway System" (NHS) category of funds to be used on alternative arterial or transit improvements that cost-effectively benefit the NHS route. In addition, it provides for the transfer of up to 50 percent of the NHS funds (100 percent with the approval of the Secretary of Transportation) to the more flexible "Surface Transportation Program" (STP) category. This program provides funds to the state and the region which can be used for literally any transportation capital improvement. In addition, ISTEA creates two new categories to address environmental concerns. An Enhancement Program is created to fund environmental mitigation, bike trails, historic preservation, scenic easements and landscaping and acquisition of abandoned rail corridors. A new Congestion Mitigation/Air Quality Program is created to implement Air Quality Implementation Plans in non-attainment areas. In total, up to one-half of the \$1.1 billion of federal highway funds are potentially flexible.

Under these circumstances, we have the following comments:

1. The projects identified for Modernization are important priorities for the Portland region. They were ranked "high" by the Portland region based upon a comparison with other needed highway projects. They would help advance the highway element of the Regional Transportation Plan.
2. The Draft as currently published is \$173 million overprogrammed and, in all likelihood, is more overprogrammed considering the eligibility of using the two new environmental accounts. In order to comment on these priorities, we need a balanced statewide program to evaluate. While we can comment on the relative priority of projects in our region, we are unable to weigh these against projects elsewhere in the state.
3. ISTEA changes directions for metropolitan areas and states throughout the country, emphasizing a multi-modal approach to transportation solutions and a sensitivity to protecting the environment. ODOT has done an excellent job in moving toward a more multi-modal direction through development of the Draft Oregon Transportation Plan (OTP). The Six-Year Program, however, does not consider the possibility of using this new flexibility for alternative transportation improvements. The Portland region expects to consider a multi-modal set of alternative transportation projects for funding through its STP Program. Use of state STP and NHS funds should also take into consideration a multi-modal set of transportation improvements and it is important to have resources to implement the OTP when it is adopted. In addition, use of the Enhancement Program and the Air Quality Program should consider a broader set of candidate projects. In particular, the Regional Transportation Plan includes examples for each of the following types of projects which should be considered:
  - arterial alternatives to NHS routes;
  - arterial improvements required for urban mobility;
  - transit projects as alternatives to an NHS improvement or urban mobility improvement to accelerate Tri-Met's Transit Development Program;
  - bikepaths, pedestrian paths, rail right-of-way acquisition, historic preservation and other enhancement projects;

- air quality projects, particularly demand management programs; and
- establishment of funding towards future regional rail corridors.

We recommend creation of a separate Bikepath/Pedestrian Path section of the program in order to clearly reflect compliance on this issue to the Transportation Rule. We also recommend that ODOT separate out the newly available "Enhancement" and "Air Quality/Congestion Mitigation" programs and allow the region to submit project recommendations before adoption in July. Finally, multi-modal projects should be included in the "Development" section to ensure projects are ready to go for future Six-Year Program updates.

4. We request that ODOT work with the region to respond to the changing environment created by passage of ISTEA in order to ensure that programming of funds produces a balanced multi-modal Regional Transportation Plan and Oregon Transportation Plan.

Optional added JPACT language:

In addition, we request that ODOT flag specific new projects in the adopted Six-Year Program in order to allow the region to work with ODOT to consider alternative projects by October. This would then allow ODOT to entertain an amendment to the Six-Year Program at that time.

5. Consideration of bonds for meeting the unfunded portion of the Six-Year Program is an interesting prospect. However, care should be taken to not use bonds to commit future flexible federal funds for highway improvements to be built in the short term. This would have the effect of committing future flexible funds for highways, thereby closing out their consideration for alternative transportation projects.
6. A Bridge Program could be administered on a statewide basis. The opportunity for ODOT to undertake this task is presented by the large increase in Highway Bridge Replacement (HBR) funds. Under this approach, ODOT would select projects for funding based upon the severity of the problem, regardless of jurisdiction rather than administering a state highway Bridge Program separate from a City/County Bridge Program. (See attachment endorsed by JPACT and AOC for more details.)

ODOT

February 12, 1992

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7. The region expects to undertake a similar multi-modal project evaluation for newly available Surface Transportation Program funds, Enhancement funds, Air Quality/Congestion Mitigation funds and Section 9 funds.

The overall concern of the Portland region is to implement all aspects of the multi-modal Regional Transportation Plan. Toward this objective, use of funds in the Six-Year Program and new federal funds available to the region are only a part of the overall solution. These decisions must be integrated with a comprehensive approach to development of new transportation resources.

ACC:lmk



**METRO**

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

# Memorandum

**Date:** June 3, 1991

**To:** JPACT

**From:** Andrew C. Cotugno, Transportation Director, Metro  
Jerry Parmenter, Washington County  
Terry Bray, City of Portland

**Re:** ODOT HBR Program

We recommend inclusion of the attached HBR recommendations as part of the region's comments on the ODOT Six-Year Program update. TPAC endorsed this proposal at their May 31, 1991 meeting.

ACC:JP:TB:lmk

Attachment



## Highway Bridge Replacement Program Recommendations

1. The program under the 1987 Surface Transportation Act is now nearly complete. During the period from 1987 to 1991, the program faced severe federal cutbacks, resulting in deferred bridge projects. The 1991 Surface Transportation Act appears to include a renewed Bridge Program with a substantial increase in funding level to Oregon. This presents an opportunity to take a fresh approach to the administration of the program.
2. It is recommended that ODOT pursue a comprehensive approach to selecting bridge projects to fund through the new HBR Program which selects bridges according to their importance and severity of deficiency regardless of jurisdiction. This would put state and local bridge projects on an even playing field.
3. As an interim approach, it is recommended that ODOT develop a two-year allocation of funds to both state and local projects through the current Six-Year Program process using existing policies and procedures. The criteria and ranking used for the selection of state and local projects should be released through the Six-Year Program process.
4. During the next two years, it is recommended that ODOT, AOC and LOC develop through an independent contractor a process and criteria to be used in the next update to select bridges. The selection of projects for the remainder of the '91 Surface Transportation Act should be programmed in the next Six-Year Program update. This should be based upon a common set of criteria, regardless of jurisdiction.
5. These recommendations should be communicated to the Oregon Transportation Commission and ODOT's Local Officials Advisory Committee as input to the current Six-Year Program process.
6. These recommendations should be communicated to AOC and LOC for consideration of a revised intergovernmental agreement with ODOT regarding administration of the HBR Program.

### CURRENT POLICIES AND CRITERIA:

1. The current STA requires a minimum of 15 percent and a maximum of 35 percent to be spent for bridges "off the Federal-Aid Highway system." All such bridges are under the jurisdiction of local governments.
2. The ODOT/AOC/LOC agreement on the HBR Program provides an allocation of HBR funds to off-system bridges (between 15-35 percent) based upon their share of the total cost of deficient bridges.

3. There is no clear criteria to fund "on-system" local projects. Actual experience has been a 37 percent share to local governments for both on and off-system projects.
4. Local government bridge priorities are established using the following criteria:
  - . FHWA sufficiency rating
  - . Cost per ADT
  - . Percent of deficient structures under the responsibility of the applying jurisdiction (sufficiency rating < 50)
  - . Historical structure rehabilitated rather than replaced

Local bridge selection is administered through a bridge committee which includes an AOC and LOC appointee.

5. ODOT provides half of the 80/20 local match; they are now reconsidering this policy.
6. ODOT pays for the inspection of all state and local bridges, providing a comprehensive, uniform assessment.
7. The design standards for state and federally funded bridge projects are defined by ODOT consistent with AASHTO standards. Changes in these design standards as prescribed by the state become the defacto standard for locally funded bridge projects.

SUMMARY  
Draft ODOT 6-Year  
Transportation Improvement Program  
Modernization Projects

1993

I-84	181st Ave. to 223rd Ave. widening/interchanges	\$39.3
US 26	Widening w/ LRT	46.0
TV Hwy	Shute Park Rd. to 21st Ave. widen/curbs/sidewlks	5.87
Hwy 47	Banks to Forest Grove widen/realign	4.2
Hwy 213	@ Leland Rd. intersection	.74
I-5	Tualatin Park & Ride	.4
Hwy. 217	Ramp Metering	.66
I-205	Bikeway Clackamas River to McLoughlin Blvd.	.18
Hwy 99W	Bikeway Bancroft to Terwilliger	.3
Various TSM Projects		<u>.76</u>
		\$98.41

1994

I-5	Stafford Rd. Interchange	\$12.645
I-5	Hwy. 217/Kruse Way Interchange	36.442
US 26	Widening w/ LRT	10.386
US 26	Sylvan reconstruction w/ LRT	24.235
Hwy. 43	TSM from Taylor's Ferry to I-205	1.672
Greenburg Rd.	Bikeway	.562
Hall Blvd.	Bikeway	<u>.605</u>
		\$86.547

1995

I-5	Water Ave. Ramps	\$17.5
I-84	223rd to Troutdale widen/interchanges	50.32
I-205	Glisan SB LT Lane	.175
I-205	Glisan NB LT Lane	.396
US 26	Widening w/ LRT	48.1
Hwy. 43	Bikeway @ McVey	.524
Hwy. 43	Jolie Pt. intersection	.334
Scholls Ferry Rd.	@ Beef Bend Intersection LT lane	.733
Boones Ferry Rd.	Bikeway	<u>.19</u>
		\$118.272

1996

I-205	Columbia Blvd. SB on-ramp widening	\$ .435
US 26	Widening w/ LRT	19.625
Sandy Blvd.	MACS	5.095
TV Hwy.	110th to 160th sidewalks/overlay	1.16
TV Hwy	Hwy 217 to 117th raised median	4.63
Hwy. 43	West Linn Park & Ride	.462
Hwy 99E	Harold to Tacoma widen to 6 lanes	13.029
Hwy 99E	Milwaukie Park & Ride	2.5
Hwy 99W	@ Tualatin Rd. intersection	.966
Farmington Rd.	Murray to 209th widening	26.273
Various TSM		<u>.873</u>
		\$74.175

1997

I-5	Marquam ramps to McLoughlin Blvd.	\$63.074
I-84	Gateway Park & Ride	2.25
US 30	NE Portland Hwy. @ 60th	6.904
Hwy 47	Relocation in Forest Grove	9.037
Hwy 99E	Marquam Ramps to Harold St. widening	9.257
Scholls Ferry Rd.	@ Hwy 217 intersection LT lane	.45
Various TSM		<u>3.851</u>
		\$94.823

1998

I-5	Hwy 217/Kruse Way Interchange	\$12.8
I-5	Hood Ave. to Terwilliger SB Climbing Lane	41.563
I-84	82nd Ave. Park & Ride	.355
US 26	Cedar Hills Blvd. to 185th Ave widen to 6 lanes	40.119
Beaverton-Hillsdale Hwy.	@ Hwy. 217 LT lane	1.11
Various TSM		.955
Various MACS		<u>4.036</u>
		\$100.938

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GRAND TOTAL		\$573.165
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COMMITTEE MEETING TITLE JPACT

DATE 2-13-92, 7:15 a.m.

NAME

AFFILIATION

NAME	AFFILIATION
EARL BLUMENAUER	CITY OF PORTLAND
Steve Greenwood	DEQ
Bob [unclear]	Clackamas Co.
LARRY COLE	CITIES OF WASHINGTON COUNTY
Jim Gardner	Metro
Don Forbes	ODOT
Gerry Smith	WSDOT
Susan McLean	Ometro
Les White	C-TRAN
Carter MacNicol	PORT
TOM WASH	TRI-MET
Roy Rogers	WASHINGTON COUNTY
BOB LIDDELL	CITIES OF CLACKAMAS COUNTY
RICHARD DEUKIN	METRO
Andy [unclear]	metro
Rachel [unclear]	Mult. Co.
Miss Ellie	Downtown
Tom Santor	Clackamas County
Ernie Warner	WASH. COUNTY
Craig [unclear]	Clackamas Cities
GB ARRINGTON	TRI-MET
STEVE DOTTERER	CITY OF PORTLAND
Tuck Wilson	

COMMITTEE MEETING TITLE

SPACT

DATE

2-13-92

NAME

AFFILIATION

JIM HOWELL

OREARF

Molly O'Reilly

CITIZEN

Roger Buchanan

Metro Council

Rick Root

BEAVERTON

Gail Ryder

Metro

JOHN RIST

ODOT

Jill Larsen

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Don Adams

ODOT

Ted Jones

ODOT

Bob Post

TRI-MET

Dean Cokingbill

IRC

Keith Ahola

WSDOT

KIM CTTN

C-TRAN

DAVE C. CHAMBERS

WASHINGTON COUNTY - VICE CHAIR  
HAND-USE ADVISORY COMMISSION