

 **Metro** | *Agenda*

Meeting: **RTO SUBCOMMITTEE OF TPAC ****
Date: **Wednesday, December 14, 2011**
Time: **3:00 p.m. – 5:00 p.m.**
Place: **Room 501, Metro Regional Center, 600 NE Grand Avenue, Portland**

Subcommittee members: To join the meeting by phone, please contact Pamela Blackhorse in advance of the meeting at Pamela.Blackhorse@oregonmetro.gov or 503-797-1757. Pamela will call you from the meeting room to link you to the phone conference. Conference calls are limited to three people.

- 3:00 p.m. Call to order/declaration of a quorum/introductions
- 3:05 p.m. Meeting summary from November 2011 Meetings
[APPROVAL REQUESTED]* – Dan Kaempff, Metro
- 3:05 p.m. Citizen Communications
- 3:10 p.m. RTO Strategic Plan Draft Recommendations & Discussion
[INFORMATIONAL]*
- 3:10 – 3:20 p.m. Strategic Plan Overview (Dan Kaempff, Metro)
- 3:20 – 3:35 p.m. Mission, Goals, & Objectives (Thomas Brennan, Nelson\Nygaard)
Presentation and discussion
- 3:35 – 3:50 p.m. Evaluation (Thomas Brennan)
Presentation and discussion
- 3:50 – 4:20 p.m. Roles & Actors (Thomas Brennan)
Presentation and discussion
- 4:20 – 4:50 p.m. Funding Prioritization (Thomas Brennan)
Presentation and discussion
- 4:50 – 5:00 p.m. Strategic Plan Next Steps and Transition Plan (Dan Kaempff)
- 5:00 p.m. Adjourn

* Meeting materials will be available electronically prior to the meeting.

** Inclement weather reminder: in case of inclement weather, the Metro Regional Center may have a late opening or building closure. For information about meeting cancellations due to building closure or late opening, please access www.pdxinfo.net.



***RTO Subcommittee of TPAC
Wednesday, November 9, 2011
3 to 5 p.m.
Metro Regional Center, Room 270***

Committee Members Present:

Dan Kaempff - Chair	Metro
Sarah Angell	TMA Representative
Dan Bower	Portland Bureau of Transportation
Adriana Britton	TriMet
Jennifer Campos	City of Vancouver
Gail Curtis (alternate)	Oregon Department of Transportation, Region 1
Sandra Doubleday	City of Gresham
Susan Drake	Department of Environmental Quality
Adrian Esteban	Community Representative
Derek Hofbauer	Community Representative
Steve Hoyt-McBeth	Portland Bureau of Transportation
Jen Massa Smith	City of Wilsonville SMART
Alison Wiley	Oregon Department of Transportation

Committee Members Excused:

Len Smith	Oregon Department of Energy
Aisha Willits	Washington County

Metro Staff:

Mary Ann Aschenbrenner	Metro
Pamela Blackhorse	Metro
Ted Leybold	Metro
Pam Peck	Metro
Deena Platman	Metro
Caleb Winter	Metro

Guests:

Lenny Anderson	Swan Island TMA
Brie Becker	Nelson Nygaard
Pete Collins	SWCR
Steve Hoyt-McBeth	Portland Bureau of Transportation
Ross Peterson	Nelson Nygaard
Jessica Roberts	Alta Planning

I. CALL TO ORDER/DECLARATION OF QUORUM/INTRODUCTIONS

Chair Kaempff declared a quorum and called the meeting to order at 3:03 p.m.

Chair Kaempff provided a flyer for Metro's Active Transportation Program. He asked the Subcommittee to review the information and provide feedback for the program scope of work by next week.

II. MEETING SUMMARY FROM JULY & SEPTEMBER 2011 MEETINGS

Chair Kaempff asked if there were any changes to the July 13, and September 14, 2011 meeting minutes. Ms. Britton asked for changes to the July minutes for the redundant language for vehicle miles reduced. There were no changes to the September minutes.

Chair Kaempff asked for a motion to approve the meeting minutes for July and September, with the changes as stated. Mr. Hofbauer moved to approve the meeting minutes. Ms. Britton seconded the motion. The meeting minutes for July 13, and September 14, 2011 were unanimously approved. There were no abstentions.

III. CITIZEN COMMUNICATIONS

Ms. Roberts with Alta Planning briefly discussed the ACT Canada conference and asked the Subcommittee if they would be interested in more information.

Mr. Anderson of Swan Island TMA announced that there would be a ground breaking ceremony for the Waud Bluff Trail at 3 p.m. on November 15 and invited the Subcommittee members to attend.

IV. RTO STRATEGIC PLAN DRAFT RECOMMENDATIONS & DISCUSSION

Chair Kaempff introduced Mr. Ross Peterson with Nelson Nygaard. Mr. Peterson presented the preliminary recommendations and a draft mission statement for the 2012-2017 RTO Strategic Plan. He outlined the goals and objectives based on findings from the think tank meeting, evaluation and stakeholder interviews, and staff and Subcommittee input. Additionally, he discussed the implications of the landscape scan and the biennial performance evaluation.

Further, Mr. Peterson talked about the approach to the new funding structure for the Plan. He discussed the new transportation demand management (TDM) landscape in light of current economic challenges and talked about reevaluating public/private partnership policy to determine what the desired outcomes should be.

Mr. Peterson presented four key issues: mission and desired outcomes, evaluation, actors and roles, and funding prioritizations. He stated that the mission and desired outcomes addressed quality of life, economic development, travel convenience, competitive travel choices, health and social and regional equity. He pointed out that climate change was down played due to economy and stated that vehicle miles reduced (VMR) should not be the only performance measure.

Further, he asked if RTO staff should play the role wholesaler or retailer. He recommended improvements be made by linking Metro's statement of "Making a Great Place" to the RTO mission and desired outcomes and suggested they identify how the program feeds into the performance targets of the Regional Transportation Plan (RTP) triple-bottom-line framework.

Mr. Peterson suggested the draft mission statement as: “Make the Portland Metro Region a great place by working with local and regional partners to promote travel options that increase active transportation, are environmentally sustainable, and support economically vibrant communities.”

The Subcommittee suggested that they move the last part of the statement to the beginning. Additionally, they questioned the value of leading with the value behind Congestion Mitigation and Air Quality (CMAQ). Finally, they asked who the audience would be for the statement and asked if freight’s movement of goods and services should be included as an economic performance measure.

Mr. Peterson stated that the Subcommittee would be the audience for the mission statement. Chair Kaempff suggested that they view the mission statement in light of how the RTO Program would be presented to the public.

Mr. Peterson discussed the recommended goals and objectives for Plan:

Goal 1: “Align the RTO program with regional growth management and livability objectives.” This will help articulate performance measures for diverse projects and integrate RTO with other parts of Metro. Additionally, it should support projects that provide information and services to a geographically and socio-economically diverse population. Further it should work with other Metro programs and regional partners to make travel options part of every transportation project.

Goal 2: “Be a leader in developing local, regional, and national policies that promote walking, biking, transit and high-occupancy vehicle travel.” As such, RTO should develop programs that meet needs in urban centers, corridors, and suburban areas, as well as work with local jurisdictions to build local political and staff support. Additionally, the program should support local jurisdictions in developing and implementing policies that support the RTO mission, measure and evaluate the success of the Program to report progress, aid in decision-making and encourage innovation.

Goal 3: “Support local partners to engage with employers and commuters to increase the use of travel options for commute trips.” Mr. Peterson stated that employer outreach would remain a very important part of the program. It should support local partners to make and provide travel options services to employers and commuters, and provide information and technical services to local and regional partners. Additionally, it should make the business case for employers to support travel options, and address employer needs in transit underserved areas.

Goal 4: “Develop tools to support consideration of travel choices and the increased use of travel options for all trips.” Mr. Peterson pointed out that Drive Less, Save More (DLSM) was important to the program. He encouraged the Subcommittee and staff to continue the regional collaborative marketing coordination to increase awareness of travel options and reduce drive-alone trips, develop and enhance traveler information tools and provide technical services to local partners to help support the RTO mission.

The Subcommittee pointed out that they were already a leader in developing policy for walking and biking.

Mr. Peterson stated talked about evaluation and posed questions about what should be measured and how. Further, he stated that Nelson\Nygaard began a meta-evaluation or an evaluation of the evaluation process and provided successful evaluation examples.

Mr. Peterson addressed several evaluation challenges, He stated that some transportation management associations (TMAs) struggled to get private sector support and recommended not using VMR as the singular performance measure in the strategic plan. He suggested that small grant recipients struggled to achieve reporting requirements and pointed out that staff capacity was an issue, as well as the lack of consistency in reporting requirements.

Mr. Peterson stated that a singular VMR performance measure was not realistic, as not all programs are designed to achieve that VMR goal right away. Additionally, Mr. Peterson questioned how they might measure VMR performance to translate into health as a desired outcome. He asked if they should allow CMAQ reporting to drive performance measurements or was it possible to include other performance measures.

Moving forward, he stated that they would need to track other desired outcomes and multiple targets and recommended being more strategic about performance measures. Additionally he suggested that reporting and invoicing relate directly to contracted goals, RTO goals and the RTP. He stated that evaluations should align the level of reporting with the funding level and program type. Further, he suggested that program type point to awareness-focused or action-focused performance measures.

Mr. Peterson pointed out that some programs received more funds than others. He suggested that evaluation expectations grow with the amount of funding given. Further, he suggested they tie reporting and invoicing to the RTO goals and stated that programs that did not have as much funding utilize awareness-focused outputs only. He suggested that programs with outputs and preliminary outcomes consider some mechanism within the framework to estimate outcomes. Finally, Mr. Peterson proposed an evaluation framework of: RTP goals, RTO goals, RTO performance measures, contracted expectations, reporting requirements and evaluation. He stated that some of this already existed but would need to be strengthened.

The subcommittee again stated these suggestions were similar to what they do already. Additionally, they pointed out that funding for programs such as Sunday Parkways would be affected and felt that that this and other projects differed from measurement of individualized marketing (IM) programs. Mr. Peterson mentioned that Metro needs to understand this and be in sync with the amount that RTO invests.

Mr. Peterson discussed the roles for Metro, its partners and RTO. He stated that Metro should be a policy leader, a leader for program development and a regional liaison for shared best practices. Metro should build local capacity and political support, as well as provide technical services and regional marketing. However, partner roles should cover on-the-ground delivery, retail role, with Metro playing the wholesale role. Additionally, partners should continue with employer outreach and regional collaboration. Finally, he stated that TDM functions cover policy input, planning, travel options services such as ridematching, technical services, marketing and evaluation.

Further, Mr. Peterson pointed out that the role of Subcommittee was conflicted in terms of financial decision making versus being a collaborative forum. He stated that making financial decisions were divisive and did not support a collaborative forum. He suggested that the Transportation Policy Advisory Committee (TPAC) carry funding decisions and suggested that the RTO subcommittee hold quarterly forums.

The Subcommittee expressed concern. They pointed out that the details could get lost if funneled up to a higher level. However, they recognized the need to help TPAC fully understand how the Program and its more complex issues worked. Further, they stated that they looked at the overall picture and not just the numbers, which kept them from neglecting smaller groups who could benefit from funding and helped them structure where funds should go. Finally, they questioned whether separate roles would give them more freedom to collaborate and make recommendations based on the goals presented, They felt that developing a more straightforward evaluation may assist with strengthening the objective criteria.

Mr. Peterson responded that RTO and its partners had a culture that held onto programs that were not beneficial. He pointed out that committee objectivity tended to become diluted by the collaborative functions. Mr. Peterson asked them to consider the issue and whether or not it should be addressed.

Additionally, Mr. Peterson pointed out that, in terms of TMA policy, booster grants were a misnomer as it was similar to the base funding they already received. He pointed this out as a good example of why decision making was difficult and roles were incompatible.

Mr. Peterson presented the funding prioritization as a spectrum of opportunity in which formula funding and regional equity vied with performance of corridors and infrastructure. He pointed out that perspectives should address organizational capacity, consider outlying areas, corridors and local jurisdictions while providing formula funds for regional employer outreach done by TriMet. He stated that the current funding structure embodied many of stated issues and recommended a funding structure with a local performance-based approach. He recommended consolidating grants. He suggested combining TMA, IM and small grant program funding and emphasized the need for local support, a problem statement, a proven business model, or complementary funding stream. Additionally, he suggested shifting some administration funding to support Metro regional technical services.

Mr. Peterson stated that a competitive grant process would align with the previously mentioned goals, but acknowledged that political realities could influence these decisions. However, he stated that the benefits were already proven through local support and funding, emphasis on local transportation system plans (TSP)s and alignment with other regional infrastructure investments. Ideally, it would allow Metro staff to spend more time to build local capacity and provide technical services.

The Subcommittee pointed out that TMAs would have to go through a competitive process for funding. They questioned if there would be access to the technical services. They wondered what the implications would be for an established TMA. Finally, they stated that TMAs would not be guaranteed funding unless they meet the performance measures.

Mr. Peterson acknowledged their questions and stated that less money would stay with RTO staff, while more went out to partners. Grants would require local support. Performance measures would allow for small projects. He acknowledged that this would move funding from being TMA centric and shift focus from VMR goals to include performance measures.

The Subcommittee recognized that they needed a goal that would address economy and equity, but agreed that air quality alone would not be enough. RTO Staff pointed out that the RTP had six or more criteria that address economy, environment and community and asked what an economy based goal would look like. The Subcommittee suggested measuring productivity and value, but questioned how to

do this without using VMR. They asked if economic metrics would create a new set of issues and suggested that they address how much household income was spent, or not spent using alternative modes of transportation.

Mr. Peterson acknowledged the Subcommittee's suggestion for using mode shift as a performance measure. He proposed that they consider using mode split and VMR and their effects on health, active transportation and the reliability of transportation modes. Chair Kaempff pointed out that short trips would not generate VMR, but shifting modes for short trips is consistent with RTO goals. He suggested that they emphasize particular travel modes in geographic context.

The Subcommittee felt that congestion as a performance measure has challenges. Additionally, they stated level of service was a bad metric to use, but that a multiple measure process should be considered. Further, they pointed out that equity was rather broad. They asked that the strategic plan also consider people with disadvantaged backgrounds and how they influence mode shift. Mr. Peterson pointed out that they could also track the number of people contacted as an output.

The Subcommittee asked if Nelson Nygaard would be making more recommendations for the strategic plan. They suggested that partnerships be strengthened and asked for any suggestions for adding new partners in the future. Additionally, they suggested that health and wellness be tied in. Further, they asked if individualized marketing had policy language from past TPAC and JPACT funding decisions. Finally, they suggested that Nelson Nygaard consider an "opportunity statement" for grant applications (Nelson Nygaard's recommendation is to include a "problem statement").

Mr. Peterson stated that they would make additional recommendations for the plan based on the Subcommittee's input. The Subcommittee agreed that they had enough information to go on from Nelson Nygaard's presentation until a draft RTO Strategic Plan can be sent out December 7. Chair Kaempff asked the Subcommittee to get back to him with comments no later the next Subcommittee meeting on December 14.

V. ADJOURN

There being no further business, Chair Kaempff adjourned the meeting at 5:03 p.m.

Meeting packet materials:

Document Type	Date	Description	Document Nbr.
Agenda	110911	Agenda, November 9, 2011	110911-rto01
Summary	110911	Meeting Summary, July 13, 2011	110911-rto02
Summary	110911	Meeting Summary, September 14,2011	110911-rto03
Document	110911	Active Transportation Flyer	110911-rto04
Document	110911	Memorandum: CMAQ Quarterly Report	110911-rto05
Presentation	110911	Nelson Nygaard: RTO Strategic Plan	110911-rto06

Meeting summary respectfully submitted by,

Pamela Blackhorse
November 9, 2011

DRAFT



Date: UPDATED - December 8, 2011
To: Regional Travel Options Subcommittee and Interested Parties
Cc:
From: Dan Kaempff, Principal Transportation Planner
Re: **DRAFT Regional Travel Options Strategic Plan**

The main item for discussion at next week's RTO Subcommittee meeting will be the draft RTO Strategic Plan.

Please review the Plan and prepare for a discussion at the meeting on the 14th. There are several specific areas in the draft plan that reflect significant changes to the current RTO program structure.

- Proposed performance measures would broaden the means of measuring program outcomes and create a tiered strategy tied to levels of funding. These proposed measures support Triple Bottom Line desired outcomes in the areas of Society, Economy and Environment as called for in the 2035 Regional Transportation Plan.
- Based on stakeholder input, it is recommended that Metro's role as an outreach partner be eliminated, and the existing resources and responsibilities associated with that task be reallocated to other regional partners. Metro's roles in the areas of fiscal administration, marketing and communications coordination, evaluation and technical support would continue, but with some refinements.
- The Plan is recommending a series of changes that, if immediately adopted, would result in significant budget impacts for a number of RTO partners. Several current dedicated programmatic and grant funding streams would be consolidated into one competitive grant process, to be conducted biannually.

Recognizing the significance of these proposed changes, Metro staff is suggesting a high-level summary outlining the next steps required of both Metro and regional partners be added to the plan once the plan elements have been approved by the Subcommittee. Based on this, a more detailed implementation strategy will be developed with input from stakeholders and Subcommittee members in the weeks and months ahead.

It may be useful to consider the following general timeline and series of events leading to Plan adoption:

- 12/14/11 – RTO Subcommittee meeting. Review and discussion of initial draft Strategic Plan
- Mid-December to early January – Provide comments to Metro staff and Nelson Nygaard
- 1/11/12 – RTO Subcommittee meeting. Strategic Plan action
- 2/17/12 – TPAC meeting. Strategic Plan briefing
- 3/1/12 – JPACT meeting. Strategic Plan briefing
- 3/30/12 – TPAC meeting. Strategic Plan action
- 4/12/12 – JPACT meeting. Strategic Plan action
- Late April – Council adoption



METRO REGIONAL TRAVEL OPTIONS

2012 – 2017 STRATEGIC PLAN

Draft

December 2011



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EXECUTIVE SUMMARY

Metro's Regional Travel Options (RTO) program supports Metro's mission of creating a great place by increasing the awareness of non-single occupancy vehicle (SOV) travel options such as biking, walking, taking transit, and ridesharing. The RTO program is an important, low-cost component of the region's aggressive goal to reach a non-SOV mode-share of 50 percent or more by 2035. In fiscal year 2009-2010, the RTO program accounted for only half of one percent of the region's transportation budget, yet it funded over 20 regional partners and helped to reduce between 98 and 145 million vehicle miles traveled¹. At the core, the program is designed to help make the best use of the region's existing transportation infrastructure and service investments.

To accomplish this, the RTO program provides strategic investments in a range of programs, including: individualized marketing, employer and commuter travel options, Transportation Management Associations, and traveler information tools and services. These investments contribute to the economic, environmental, and socio-economic health and prosperity of the region in the following ways:



RTO Investments contribute to making a great place

- **Economic:** The RTO program helps to reduce traffic congestion by encouraging non-SOV modes. Decreased traffic congestion ensures the efficient movement of freight and goods. Moreover, RTO investments help to utilize the existing transportation system, instead of investing money into new and costly infrastructure improvements. Cost effective travel options such as biking and walking put money back in people's pockets that can be spent in the local economy rather than exported to international oil companies. This green dividend has been attributed to saving Metro area residents as much as \$2.6 billion per year².
- **Environment:** Biking, walking, taking transit, ridesharing, and telecommuting help to reduce the number of single occupancy vehicles on the road. As such, the RTO program reduces greenhouse gas emissions, reduces water pollution from auto travel, and improves air quality.
- **Equity & Health:** The RTO program works to provide affordable transportation options for all residents. Households in the Metro region generally spend between 15% and 28% of their household income on transportation costs.³ Non-SOV modes can provide more affordable transportation choices. Moreover, these transportation options improve community health (improved air quality, active transportation options, etc.)

¹ These figures reflect a conservative estimate based on reported figures and include a 40 – 60 percent discount from actual numbers reported from the various sources. Because ECO data includes employers' VMR over multiple years between their baseline and follow up surveys, these figures also reflect so-called maintenance VMR, or VMR reduced as part of prior investments.

² Cortright, J. (2007, June 28). Portland's Green Dividend. Chicago, Illinois: CEOs for Cities.

³ Center for Neighborhood Technology. (2011). "Housing + Transportation Affordability Index" Portland-Vancouver WA. Web. Assessed 15 November 2011.

GUIDING PRINCIPLES

The purpose of this strategic plan is to define a mission, a set of goals and objectives, and a 5-year plan that supports a regional travel options program. The strategic plan development process was guided by the following principles:

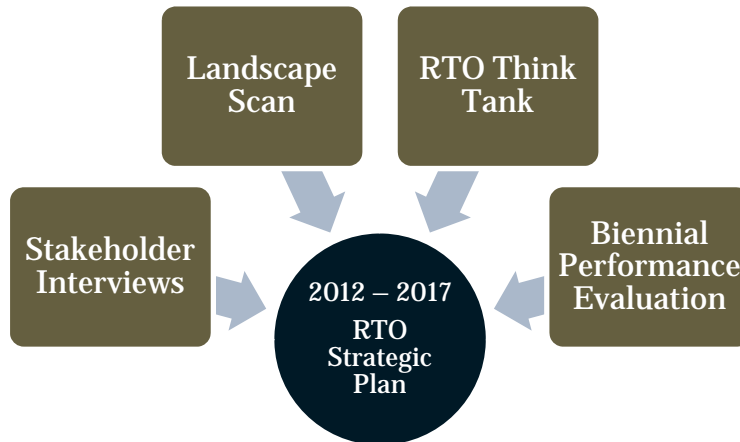
- Link to other Metro programs to proactively integrate transportation demand management into regional planning and growth management processes
- Enable local partners to reach out to employers and residents to help make non-SOV travel choices
- Provide regional policy support and program development that supports efficient use of the existing transportation system
- Establish a sustainable and diverse funding stream by linking the RTO program to other Metro transportation investments
- Streamline Metro RTO services to limit duplication of roles and foster collaboration and the sharing of best practices among regional partners
- Position the Metro RTO program to leverage community partners – such as health care providers, local jurisdictions, non-profit organizations and others – to proactively build a regional travel options program that serves the diverse needs of the region
- Develop a streamlined evaluation process that links to Metro’s overarching economic, environmental, and community building goals and reduces the administrative burden on Metro RTO staff and its grantees

METHODOLOGY

The 2012-2017 Metro RTO strategic plan is supported by the following four efforts (also represented in Figure 1, below):

- **Stakeholder Interviews:** 17 interviews with over 50 participants were conducted to understand the strengths, weaknesses and opportunities of the Metro RTO program. Participants included local city and county representatives, Metro staff, businesses, non-profit organizations, transit agencies, state representatives, universities, and current and past RTO grant recipients. Appendix X provides a summary of the stakeholder interviews.
- **Landscape Scan:** A landscape scan was conducted to understand expected external changes to the Metro RTO program in the next five years, such as increasing energy prices, emerging social media and traveler information technologies, and an increased emphasis on the connection between transportation and health. Appendix X provides a complete summary of the landscape scan.
- **RTO Think Tank:** On October 6, 2011, regional policy makers and leaders in the community gathered to discuss key issues facing the RTO program to help guide the direction of the program in the next five years. Participants included city and county policy makers, health care representatives, Metro Councilors, and non-profit representatives. Appendix X provides a summary of meeting notes from the Think Tank event.
- **Biennial Performance Evaluation:** A biennial performance evaluation was conducted to assess the performance of Metro RTO-funded programs. Appendix X provides the complete biennial evaluation.

Figure 1 Metro RTO Strategic Plan Process



ORGANIZATION

This strategic plan is organized into four components. **Chapter 1, Existing Program Structure**, provides an overview of the existing RTO program. A succinct and in-depth understanding of the existing program enables the reviewers to evaluate the program as a means of identifying issues and opportunities to be addressed in the strategic plan. The findings of the assessment – which are sourced from a wide range of inputs including stakeholder interviews, the biennial assessment, the project think-tank, a landscape scan, and others – are compiled in **Chapter 2, Issues and Opportunities**. **Chapter 3, Recommendations** provides strategic responses to the issues and opportunities by setting forth a series of recommendations to be considered by stakeholders, members of the RTO subcommittee, RTO staff, and ultimately Metro’s TPAC and JPACT bodies. For readers interested in more detail, the four major inputs to the strategic plan are contained in the **Appendix**. These include a summary of stakeholder interviews, a landscape scan, a summary of the think-tank meeting, and the biennial evaluation results for the 2009 – 2011 RTO investment period.

SUMMARY OF KEY ISSUES, OPPORTUNITIES & RECOMMENDATIONS

Figure 2, below summarizes these key issues and opportunities and correlates them with the recommendations. The majority of the recommendations are encapsulated in the recommended funding model which includes the following elements:

1. Clarification and reassignment of roles for Metro, TriMet, and the RTO subcommittee
2. Formalization of formula funding for TriMet’s employer outreach program
3. Consolidation of TMA, small grant and individualized marketing grants under a single competitive grant process
4. Reallocation of funds to reflect changes in roles and an increase in the proportion of funds directed toward grants
5. Updates to Metro’s Public Private Partnership policy
6. Recommendations for integrating the existing RTO evaluation framework into these other recommendations

Figure 2 Summary of Key Questions, Issues and Opportunities, and Recommendations

	Key Questions	Issues & Opportunities	Recommendations
Mission, Goals & Objectives	<ul style="list-style-type: none"> What outcomes should the RTO program strive to achieve? How can the RTO program be more closely aligned with other Metro investments? 	<p>Issues</p> <ul style="list-style-type: none"> The RTO program helps make a great place through contributions to quality of life, economic development, health, and social and regional equity. However, these contributions are not well articulated in the regional transportation policy and planning discourse The singular performance target to reduce VMT results in miss opportunities for RTO program to demonstrate its contributions to other important outcomes <p>Opportunities</p> <ul style="list-style-type: none"> Link RTO program to other Metro programs by articulating goals that reflect and build on goals defined in the RTP RTO Program evaluation framework is well advanced and can help RTO play a leadership role in performance-based planning 	<ul style="list-style-type: none"> Adopt a new mission statement that reflects RTO's contribution to making a great place Adopt new performance targets aligned with a triple-bottom-line approach to performance evaluation Integrate triple bottom line performance measures into existing evaluation methodology developed by Portland State University
Evaluation	<ul style="list-style-type: none"> What performance measures should be used to track performance relative to new goals? How should the evaluation framework be modified to respond to the changing landscape and emerging opportunities? 	<p>Issues</p> <ul style="list-style-type: none"> Stakeholders expressed a concern that evaluation requirements are overly burdensome, consume a disproportionate share of project resources, and could be streamlined without sacrificing objectives of the evaluation process. Singular VMR target and return on investment methodology skews performance measurement. <p>Opportunities</p> <ul style="list-style-type: none"> Good to Great: While some RTO funded programs faced specific challenges, many RTO investments have become national models for implementing innovative travel demand management practices. There is an opportunity to continue developing the evaluation process so that a good program becomes great. Become a leader at Metro by defining RTO's contribution to the regional goals and through adaptation of the existing evaluation framework to support a triple bottom line evaluation framework. 	<ul style="list-style-type: none"> Align level of evaluation and reporting effort with funding level and program type. Express RTO goals through evaluation criteria, RTO recipients' work plans, invoice and reporting requirements, and two-year evaluation.
Roles & Actors	<ul style="list-style-type: none"> What roles and functions should Metro and its partners play in delivering regional RTO programs? What functional changes are needed to respond to the changing landscape and new opportunities? 	<p>Issues</p> <ul style="list-style-type: none"> Overlapping roles dilute the effectiveness of individual actors. This is especially true for TMAs who compete with TriMet and others to deliver employer-focused programming. Stakeholders – including funded partners and private sector representatives – feel that employer outreach should be done by Metro's partners. Metro should play a wholesale role in support of retail level delivery at the local level. The effectiveness of the RTO Subcommittee is reduced because of its conflicting role as a funding decision making entity and a collaborative forum. Regional collaboration is important in the delivery of services. <p>Opportunities</p> <ul style="list-style-type: none"> More clearly defined roles can improve the efficiency of the RTO program by reducing redundancy. Separating the RTO subcommittee into its distinct parts has the potential to improve both the decision making and collaborative processes. 	<ul style="list-style-type: none"> Focus Metro staff resources to: Support local jurisdictions, TMAs, and other organizations that promote travel options; Serve as a regional liaison to share best practices and develop regional policy that supports travel options; Provide technical services to support local partners (mapping, website, surveys, etc.) Support TMAs, local jurisdictions, and TriMet in leading direct outreach at the local level Divide RTO subcommittee roles: funding decisions should be separated from RTO collaborative functions.
Prioritization of Funding	<ul style="list-style-type: none"> Given the issues and opportunities on the horizon, how should funding be prioritized during the next 5-year planning period? What organizational, policy, and institutional framework is needed to deliver the desired outcomes? What specific changes need to be made to the existing policy for public private partnerships (TMAs)? 	<p>Issues</p> <ul style="list-style-type: none"> Reduced availability of funding brought on by on-going economic recession RTO – like many other regional programs – faces the conflicting objective of providing for regional equity while also demonstrating performance. Not all TMAs have achieved private sector support as originally envisioned when the Public Private Partnership policy was enacted. TMA booster funding is serving more of a formula funding function than the intended performance-based function. <p>Opportunities</p> <ul style="list-style-type: none"> Provide a streamlined funding structure to ensure limited funding is dedicated to effective investments while building local capacity Increase the proportion of funding available for grants by clarifying roles, reducing redundancy and improving effectiveness 	<ul style="list-style-type: none"> Combine TMA, individualized marketing, and Small Grants Program funding; emphasize the need for local support, a problem statement, and a proven business model or complementary funding streams. Establish formula funding for employer outreach with specific performance requirements. Reduce Metro's total administrative budget for RTO and direct proportionally more funding toward grants. Eliminate TMA-specific funding and shift TMA program administration funding to support RTO recipients with technical services.

1 EXISTING PROGRAM STRUCTURE

Metro's RTO program is a regional Travel Demand Management organization serving the Portland metropolitan area. The RTO program is administratively housed at Metro, the area's regional government and Metropolitan Planning Organization (MPO). The program is delivered by approximately 6 full time equivalent (FTE) staff who perform a variety of functions in the following general areas:

- Regional Marketing & Communications
- RTO Grant Administration & Evaluation
- Employer Outreach
- Traveler Information
- Regional Mobility Coordination
- Public Private Partnership Program for Transportation Management Associations

The RTO program's work plan is directed by a five-year strategic plan. The current 2008-2013 plan identifies six goals focusing on collaborative marketing, commuter services, traveler information tools, downtowns and centers, measurement, and policy and funding. Every two years the RTO program undergoes a performance evaluation to measure progress toward these strategic goals. This year, Metro has combined the biennial evaluation with an update to its Strategic Plan as well as an evaluation of the overall effectiveness of its TMA program.

The Metro RTO program is funded by the Federal Congestion Mitigation and Air Quality (CMAQ) program. Established as part of the Clean Air Act of 1990, this program provides funding to each state to help achieve the National Ambient Air Quality Standards (NAAQs). The RTO budget is approximately \$2.5 million per year. Over the past five years the RTO budget has averaged approximately one half of one percent of the total state and federal investment in transportation infrastructure spending in the Portland region.

Metro's RTO program can be characterized as a semi-centralized partnership model. Within this model, program development occurs both locally and regionally. Delivery of services is carried out at the local level. Evaluation is conducted at both the local and regional levels, but is driven by RTO program requirements, which stem largely from federal funding requirements. Partners within this model include non-profit organizations, Transportation Management Associations (TMAs), municipalities, counties, area transit agencies including TriMet and Wilsonville SMART, and state and federal agencies.

PROGRAMS & SERVICES

The Metro RTO program manages and supports a wide range of travel options programs in the region. In partnership with local and regional organizations, the Metro RTO program supports a regional travel options marketing campaign, individualized trip planning programs for residents, employer outreach and commuter services, and traveler information and tools and services.

Drive Less/Save More Marketing Campaign

The Drive Less/Save More (DLSM) marketing campaign is a regional marketing campaign that encourages people to reduce single-person car trips and adopt cost-saving driving habits. The campaign uses radio, television, and print media, in combination with direct community outreach. As of 2011, the DLSM marketing campaign is administered by the state of Oregon; the Metro RTO program leads the regional marketing effort. Based on a 2010 regional RTO awareness survey, 34% of respondents had heard of the DLSM campaign.

Individualized Marketing

Individualized marketing projects (also called TravelSmart or SmartTrips projects) provide marketing material and traveler information tools directly to individuals in a defined geographic area or workplace who want to change the way they travel. The City of Portland, the City of Gresham, and Wilsonville SMART have implemented individualized marketing programs across the region.

Employer Outreach

In partnership with the TriMet Employer program, local jurisdictions, and Transportation Management Associations (TMAs), the Metro RTO program helps employers establish transportation management plans and comply with the state Employer Commute Options (ECO)⁴ requirements. The TriMet Employer Outreach program encourages employers to increase use of transit and other travel options among employees, offers transit pass programs, and provides one-on-one assistance to employers. As of June 2011, TMAs, Metro, TriMet, and SMART had worked with a combined 831 surveyed worksites and 168,587 employees to comply with the ECO rule. It is important to note that the employer outreach program also reached non-ECO affected employers not included in these numbers.

Traveler Tools and Information

The RTO program provides regional travel information tools and services and also provides grant money to fund its regional partners to provide these services. Programs managed by the Metro RTO program are:

- **Bike There! Map:** Metro's Bike There! map is sold in area bike shops and retail outlets. Since May 2007, over 50,000 Bike There! maps have been distributed for free or sold.
 - **Walk There! Guidebook:** In partnership with Kaiser Permanente and Drive Less/Save More, the Metro RTO program distributes the region-wide Walk There! guidebook that features over 50 walks in and around Portland and Vancouver. Since July 2008, over 54,000 Walk There! guidebooks have been distributed for free or sold.
 - **TriMet Open Trip Planner:** In October 2011, a new TriMet Trip Planner was launched using open source technology with grant funding from the Metro RTO program. The new traveling planning tool has the ability to integrate multiple modes of transportation for a single trip, helping users plan trips using a combination of non-SOV travel choices.
- Drive.Less.Connect:** Drive.Less.Connect, formerly CarpoolMatchNW.org, is a carpool and rideshare-matching site operated in partnership with the Oregon Department of Transportation

⁴ The Employer Commute Options rule was instituted by the Oregon Department of Environmental Quality; it requires employers with 100 or more employees to provide commute options to employees designed to reduce the number of SOV travel. ECO-affected employers are required to survey employees on a biennial basis with a goal of reducing SOV trips 10% below the baseline year.

(ODOT) and the Washington Department of Transportation (WSDOT). The new site was successfully launched in the Spring of 2011. In its first month, over 500 people had registered.

2 ASSESSMENT OF GOALS, ISSUES & OPPORTUNITIES

This chapter identifies the key issues and opportunities to which the recommendations respond. It is both retrospective as well as visionary. The first section, Assessment of Goals looks back at the outcomes achieved as a result of the previous strategic plan. Its findings are combined with findings from the stakeholder interviews (see Appendix X), think tank meeting, and evaluation to identify a set of key issues to which the RTO program will need to respond as it implements the new strategic plan.

While it is important to understand the past in preparation for the future, it is also important to look forward. The third section of this chapter summarizes important opportunities identified through the landscape scan and assessment of new regional initiatives. Taken together, the content of this chapter sets the stage for the recommendations outlined in Chapter 3.

ASSESSMENT OF GOALS

This assessment is organized around the six goals identified in the 2008 – 2013 Strategic Plan. The focus of this assessment is to identify elements of the prior strategic plan that worked well and what elements need improvement as part of the next strategic plan.

Goal 1: Continue a regional collaborative marketing campaign to increase awareness and use of travel options and reduce drive-alone trips.

The available evidence suggests that progress toward Goal 1 is mixed. On the positive side, the Drive Less Save More campaign made marked advancement in awareness and efficacy during the review period. Perhaps the best indicator of the effectiveness of the program comes from a comparison of key indicators surveyed in 2007 and again in 2009. Data from the DLSM survey show a ten percentage point increase in the number of respondents who recall having seen or heard the DLSM message. During this same period, the number of respondents who indicated taking action as a result of the DLSM campaign increased from 15 to 19 percent.

Although successes can be claimed at a broad level, the value of the DLSM campaign isn't as clear at the local level. Stakeholders interviewed for this effort expressed mixed feelings about the effectiveness of the DLSM campaign. While some stakeholders felt that the umbrella structure was helpful, others felt that it was difficult to effectively translate the regional message at the local level. The evaluation also highlighted a number of instances where promotion of the DLSM campaign was included as a component of grant recipient work plans, but little evidence was offered in those same recipients' quarterly reports to demonstrate the requirement was carried out.

Looking forward to the next five-year planning period, Metro's role in DLSSM is expected to change significantly. The Drive Less Save More campaign was recently transferred to ODOT. As such, Metro's role in the DLSSM program has changed from that of campaign manager to that of advisory partner. This new role has important implications for Metro's role in the DLSSM campaign. Goals for the 2012 – 2017 Strategic Plan should focus on the role of Metro in its new capacity as an advisor to ODOT in delivering the statewide marketing program. The transfer of responsibilities may also open new opportunities for Metro's RTO staff and local recipients explore new ways of using the DLSSM campaign.

Goal 2: Support employers and commuters to increase the use of travel options for commute trips.

Progress toward goal 2 is also mixed. Employer focused strategies made up over 20 percent or just over \$1.7 million of total RTO investments during the evaluation period. Historically employer outreach strategies have been among the most effective investments in the RTO portfolio. According to results from ECO surveys, employers are currently achieving an annual VMR of 46 million. In the past, Metro has claimed credit for between 40 – 60 percent of these VMR gains. If this assumption is still valid, RTO can claim its employer outreach efforts in this area achieved between 18 and 28 million VMR. In the past, RTO has used these figures to calculate return on investment (ROI). However, the reviewers are reluctant to estimate ROI because there is evidence that the ROI methodology previously used by Metro in the past is inaccurate⁵. Therefore, on a purely empirical level, the reviewers' assessment of the effectiveness of this goal is inconclusive. Anecdotally, however, employer outreach is considered an important strategy by many of the stakeholders and was often cited as a strategy that should be preserved.

Perhaps also reflecting the importance of employer outreach, there is anecdotal information offered during stakeholder interviews as well as empirical data from survey records identifying significant overlap in the employer outreach function. Currently, TriMet, SMART, Metro, TMAs and the City of Portland all offer employer outreach programs. Using a definition provided by Metro to identify employers that worked with both TriMet and a TMA, it was found that 46 out of 127 employers (38 Percent) worked with both TriMet and a TMA⁶. When excluding Lloyd District TMA, these figures show even more overlap with 38 of 59 employers (64 percent) working with both TriMet and a TMA. As part of the 5-year planning period, Metro should scale back its employer outreach programs to avoid duplication and consolidate value. Furthermore, Metro should clarify the role TriMet and TMAs play relative to employer outreach. This concept is explored in the recommendations chapter.

Goal 3: Provide information and services to support increased use of travel options for all trips.

Raising awareness about travel options was a major objective of many of the RTO program investments. During the investment period, the RTO program supported development of an Open-source Trip Planner, supported Sunday Parkways, continued distribution of BikeThere! and WalkThere! maps, and invested heavily in individualized marketing campaigns. Although the VMR benefits of these investments have not all been quantified to the same level, the available evidence suggests significant progress was made toward Goal 3 during the investment period.

⁵ See the "Evaluation" sub-heading under the "Issues" section, below.

⁶ See Figure 17 in the full evaluation report.

Open Trip Planner – this fall Metro and its partners unveiled the open trip planner to a global audience. Although development of this tool did not result in direct changes in travel patterns it marks important progress toward innovative approaches to development of travel tools. The open-source framework will enable the Portland region to leverage the benefits of and talents of a wide range of open-source software developers, for mobile, social, and web applications. This investment positions the RTO program in an excellent starting position for the next 5-year planning period as opportunities for mobile, social and web-based applications are emerging in new and powerful ways.

In a similar success, over 54,000 WalkThere! Guidebooks and over 50,000 BikeThere! maps have been sold or distributed for free. The WalkThere! book initiated a partnership with Kaiser. Kaiser Permanente supported the program by contributing \$13,000 to support walking events and distribute the Walk There! guidebooks for free. This partnership continued with a \$75,000 grant from Kaiser to fund Vamanos!, a project that works to increase awareness of great places for families to bike and walk in Cornelius, Forest Grove and Hillsboro. This partnership will enable Metro to build a lasting relationship with health care providers around the region. Over the next 5 years, Metro should continue pursuing programs that emphasize the importance of the health and transportation connection.

Although just two of five individualized marketing programs were in a position to report VMR, individualized marketing can claim between 24 and 35 million trips reduced for the investment period. Because the VMR reported for these two projects is for the same period of investment, it is acceptable to calculate RTO's ROI for these programs. With investments of \$300,000 and \$200,000, respectively, the estimated ROI was between \$0.01 and \$0.02 for Portland's Greenline individualized marketing project and between \$0.03 and \$0.05 for Portland's SmartTrips NNW project. Compared to other RTO investments, these are very impressive figures.

Goal 4: Promote and provide services that support increased use of travel options in local downtowns and centers

Progress toward Goal 4 is perhaps the most difficult to assess. The 2008 – 2012 strategic plan includes TMAs as part of this goal. During the investment period TMA's reached over 100 employers with over 35,000 employees. TMAs also participated in numerous community outreach events, delivered new employee kits, and worked to improve the bicycle, pedestrian, and transit environments in communities around the region. However, as described in the evaluation, TMAs showed variable success and struggled to get needed private sector support.

Other investments pursued under this goal included the Gresham Bike/Ped Wayfinding and Gresham Bike Safety and Bicycle Racks projects. The Gresham Wayfinding project successfully installed 103 wayfinding signs and delivered the Gresham Bicycle Guide to 10,000 people. The Safety and Bicycle Racks project resulted in a bicycle helmet and safety equipment giveaway and bike rack installation in downtown Gresham. These projects succeeded in raising awareness of bicycle and pedestrian modes in downtown Gresham. Similarly, the TriMet Beaverton Transit Center project successfully installed 16 bike lockers at the Beaverton Transit station to help with last-mile connections.

In addition to TMAs and last-mile type infrastructure projects, this goal also contains the RTO strategies for parking management and location-efficient living. There is no evidence that any major efforts were conducted pursuant to parking management during the investment period. The Swan Island Trip Not Taken project did contribute to the "location-efficient living" component of the goal. Evidence suggests

that a trend to longer commutes was significantly muted on Swan Island in comparison to the other two nearby employment areas.

Given the mixed performance in pursuit of this goal, there is an opportunity to reposition this goal as an objective focused on corridors and new infrastructure projects as part of the new strategic plan.

Goal 5: Report progress to aid decision making and encourage innovation

Progress toward goal 5 can be characterized as mixed with several exciting opportunities for turning what is already a very good program into a great one.

This year's biennial evaluation included a meta-evaluation of the evaluation process. The evaluation highlighted the following opportunities:

- A need for simplification & standardization of invoicing and reporting requirements
- Reiteration of the 2006 – 2008 evaluation finding regarding a need to include awareness and satisfaction as part of the evaluation framework
- A recommendation for clarifying the targets set forth in the strategic plan to strengthen the performance-based planning framework as it relates to both Metro's overall goals as well as the expectations for individual grant recipients.

The 2008 – 2013 RTO Strategic Plan contains aspects of a performance-based planning framework, but lacks performance measures and targets. This presents an excellent opportunity to further integrate the RTO program with the RTP and other Metro Initiatives by setting targets that are directly relate to established RTP goals.

The recommendations offered in Chapter 3 outline specific opportunities for addressing these issues simultaneously.

Goal 6: Follow a collaborative decision-making structure that provides program oversight and advances the goals and objectives of the Regional Transportation Plan (RTP)

Similar to Goal 5, progress toward goal 6 can be characterized as mixed with several exciting opportunities for turning what is already a very good program into a great one.

During stakeholder interviews several participants expressed the opinion that the current RTO subcommittee is not able to make effective funding decisions. One potential explanation for this is the committee's dual and conflicting roles of determining how RTO funds are to be spent while also serving as a collaborative forum for existing and potential RTO recipients. To a certain degree these functions are incompatible and would ideally be performed by separate bodies.

Goal 6 also contained strategies to form a senior-level policy task force created (Objective 6.2), and to track and support RTP policies and other state, regional and local policies that support increased use of travel options (Objective 6.3). It is not clear whether specific activities were conducted pursuant to these objectives

Objective 6.4 focuses on equitable and sustainable funding. RTO program included criteria relating to social equity and environmental justice as part of the grant application (criterion 8). In this respect,

progress was made toward this objective. However, as part of the next strategic plan, Metro may want to consider listing these as separate criteria to emphasize the distinguishing aspects of each.

KEY ISSUES

Mission & Desired Outcomes

In the past, the RTO program has been guided heavily by one metric or outcome: reducing vehicle miles traveled (VMT). Although the goal to reduce VMT is important, stakeholder interviews revealed a need for the RTO program to focus more on other outcomes, such as quality of life, economic development, convenient and competitive travel choices, the health benefits of active transportation, and social and regional equity. Reduced vehicle miles traveled is one of the best quantitative measures for many of these outcomes, but there is a need to define *why* reduced vehicle miles traveled is a benefit to the community, from an environmental, equity, and economic standpoint. Further, many RTO funded activities are designed as elements of a broad set of factors that will change travel behaviors; it is not always appropriate to measure the VMT reduction results of individual programs.

At a core-level the RTO program – like Metro’s other programs – is supportive of Metro’s overall mission of *Making a Great Place*. Outcomes associated with Making a Great Place - drawn from Metro’s Regional Values statement, include:

- Vibrant Communities
- Economic Prosperity
- Safe and Reliable Transportation
- Leadership on climate change
- Clean air and water
- Equity

Reduced dependence on SOV transportation contributes to all of the desired outcomes. Shifting the focus of the RTO mission and outcomes to align with those of other Metro programs can better integrate RTO efforts with other Metro programs.

Evaluation

Evaluation is an important component of the RTO process, both to adhere to contractual funding requirements, and to ensure that the region is consistently working to improve travel options and services for commuters and residents. A biennial evaluation was conducted concurrently with the 2012-2017 Strategic Plan Update. In addition to evaluating each program, the process revealed important lessons learned about the evaluation process itself. The following issues were identified:

Singular focus on VMR is Problematic

The strategic plan includes one performance measure that is used in the program evaluation process: vehicle miles of travel reduced (VMR) – which was set at 86 million miles in the 2008 strategic plan. This performance target was based on past program performance as measured by VMR per program dollar spent. Therefore, based on anticipated funding levels, the strategic plan divided these dollars by past program performance in reducing miles of travel to derive the performance target of 86 million miles. Of course, this is not really a performance target based on expected or desired performance, rather it is a performance level based on prior performance. Strategic planning should involve the setting of

objectives to meet program goals and should be based on the desired (yet realistic) performance of key programs and initiatives, not the de facto performance of past efforts.

Furthermore, performance targets need not necessarily focus solely on VMR. Clearly VMR is the most universal performance indicator that can be used to assess other TDM benefits, such as air quality (converting VMR to emission reduction) and congestion (converting peak period VMR to delay reduction). Other performance targets more readily reflect the other desired outcomes of the program including economic benefits (which can be achieved from mode shift through reduced costs of travel) and health benefits (which can also be achieved from mode shift through the increase use of active modes).

In addition, there are performance indicators that serve as precursors to the desired outcomes, such as awareness (% of target market aware of services) and participation (% of target population seeking and using services) and satisfaction (% of target population satisfied with services). These activities are often precursors to mode shift and other travel behavior changes that can lead to the desired outcomes.

Calculation of return on investment using VMR from ECO data is inaccurate

The primary flaw in the methodology is that it violates a basic standard of generally accepted accounting principles for calculation of investment returns. Namely, the calculation of return on investment includes a misalignment of the investment time period and the return time period. The investment figure covers a 2.5-year period whereas the benefit figure, VMR, is based on the sum of benefits accrued for multiple employers over varying time periods. As a result, the product of this calculation gives credit to current investments for benefits achieved during previous investment periods.

To illustrate this issue, consider the case of a single large employer. Using the current ROI methodology, the VMR benefit that was achieved when Nike first implemented its employee commute program in 1997 is still being counted in today's ROI estimates. This, of course, is not logical.

An evaluation framework is needed that reflects the long-term nature of RTO investments and accurately portrays those investments in more meaningful ROI terms.

In order to correct this miscalculation, VMR estimates need to be separated into two categories: maintenance VMR and new VMR. Maintenance VMR refers to VMR achieved in prior years as a result of prior investments whereas new VMR reflects new VMR benefits achieved as a result of the current investment. A methodology for separation of these figures should be developed if an ROI calculation using ECO data-derived VMR is considered important.

Improvements to invoicing and Reporting are needed

The evaluation process revealed opportunities for the Metro RTO program to improve its contracting, reporting, and evaluation processes. The current reporting, invoicing, and evaluation process lacks a clear linkage between program and Metro goals, contract requirements, invoice requirements and evaluation requirements. Metro RTO should implement a standardized system for contracting, invoicing, and reporting that relates to the evaluation framework proposed by Portland State University researchers in prior evaluations. Furthermore, the Metro RTO program should adopt thresholds based on program type and funding level for which higher-level reporting and evaluation is required (described in more detail below).

Actors and Roles

Regional transportation demand management programs require policy input, planning and program development, technical services, marketing, outreach, and evaluation. Defining and optimizing the roles and responsibilities in the Metro region was a key component of this strategic plan update. In particular, one of the primary questions asked by stakeholders and metro alike is whether RTO should play a wholesale or retail role in the delivery of TDM services? Input from the strategic planning process yielded the following conclusions:

- **Policy:** Metro should play a leading role in developing policy that supports regional transportation demand management (TDM) efforts. In particular, the Metro RTO staff should advocate for regional parking policy that directly supports TDM efforts.
- **Program Development:** Metro should play a leading role in developing programs that are then delivered by regional partners. Distinct programs should be developed for inner city/transit served areas versus outlying suburban areas with less access to transit.
- **Information Sharing:** There is a strong need for Metro and its regional partners to share best practices. Metro should be the convener of these collaborative forums.
- **Build Local Capacity & Political Support:** Jurisdictions and organizations that serve outlying areas expressed a need for Metro to help build local capacity and political support. Local staff are often not trained to deliver TDM services and political leaders are not always aware of the benefits of TDM.
- **Technical Services:** Small organizations and jurisdictions need access to technical services, such as GIS and mapping, survey instruments, and website development. Metro should provide these services on a fee-for-service basis.
- **Regional Marketing:** Although the DLSM campaign was given mixed reviews at the local level – the state Legislature has renewed its support for DLSM at the state level and it will continue to play a role in the region. Metro’s role should now shift toward influencing the state’s approach for delivering regional and statewide marketing.
- **Employer Outreach:** A key issue to be addressed in this strategic plan is the duplicative employer outreach efforts. In the past, TriMet and the TMAs were primarily responsible for employer outreach, while Metro played a supportive role by working with employers particularly interested in rideshare. The City of Portland also does employer outreach through its SmartTrips Business program. However, member-based TMAs, who need private sector support to sustain their operations, expressed that free services available from TriMet and others devalue their services. This dynamic suggests a need for restructuring employer outreach services. The roles and responsibilities, particularly for Metro RTO staff and the RTO subcommittee, TriMet, and the TMAs, are defined in further detail below.

Employer outreach should be delivered by regional partners such as TriMet, local Jurisdictions and TMAs and not by Metro. However, as regional partners continue to perform in this role, their specific roles will need to be better delineated.

Funding Prioritization

Funding prioritization is a key component of the Metro RTO program. The design of the Metro RTO grant process dictates the type of projects that are prioritized and funded. In the past, there were five distinct categories of RTO funding: (1) Metro grant administration and programs; (2) TMAs; (3) travel options grants; (4) individualized marketing; and (5) formula funding to TriMet and SMART. Metro’s exiting funding framework distributes approximately 28% of RTO funds to TMAs and local transit agencies

(TriMet and SMART) through a performance-based formula funding model. Approximately 31% of funds are distributed through a competitive grant process that includes small grants (12%) and grants for individualized marketing (19%). Approximately 41% of funds are retained within the RTO program for employer outreach, grant administration, evaluation, regional marketing, and TMA administration.

OPPORTUNITIES

The need to update the Strategic Plan reflects a continual evolution of the RTO program, changing external factors and new opportunities to influence travel choices.

External Changes – The Landscape Scan

This section provides an overview of economic, environmental, and societal trends that have taken place since the 2008-2013 Strategic Plan Update. The key issues outlined in this section helped to inform funding prioritization and program development for this 2012-2017 Strategic Plan Update. Figure 3 below outlines the key issues considered in the current Strategic Plan Update and corresponding policy recommendations.

Figure 3 Landscape Scan Policy Recommendations

Landscape Scan Component	Recommended Policy
Economy	Pursue funding for TDM in all major regional transportation projects.
	Develop business case for RTO program by articulating the benefits of RTO in terms of a "green dividend" and also through more efficient development patterns.
Energy Costs	Position the RTO program as a cost-saving program by showing how non-SOV modes save people money
Traveler Information and Tools: technology & social media	Prioritize funding programs in the grant process that provide regional traveler information tools in real time.
Human Health	Partner with healthcare providers to emphasize the relationship between health and active transportation to regional partners.
	Develop health indicators to track transportation and health performance metrics.
Growing Minority Population	Use individualized marketing model to develop culturally-specific individualized marketing programs.

Economy

The state of the economy is a key factor in the success of Metro's RTO program both from a funding and a program implementation standpoint. The RTO program is dependent on federal Congestion Mitigation and Air Quality (CMAQ) money to fund its efforts as well as state funds for the Drive Less/Save More campaign. Local jurisdictions also depend on ODOT transportation funding to implement local transportation projects. The future of these funding streams is uncertain. Furthermore, the Metro RTO program and its regional partners depend heavily on employers to participate in and help implement employer-based travel options programs. With depleting staff and limited private investment, businesses are less likely to commit staff and funding to such efforts.

As employers in the region become increasingly strapped for cash and staff, the RTO program will need to position itself more than ever as a cost savings program. The stakeholder interviews – particularly the TMAs – emphasized the importance of the RTO program speaking to the bottom line: from a business perspective, how can helping employees switch to non-SOV modes save them money? Moreover, innovative funding opportunities will need to be explored to help sustain the RTO program in the limited funding environment.

Energy Costs

Since 2008, the average gas price in the U.S. has increased from \$3.08 per gallon to \$3.63 per gallon in September 2011. Similarly, the average price for the west coast has increased from \$3.14 to \$3.81 per gallon during the same time period.⁷ Although energy price forecasts are highly uncertain,⁸ the price of gas is expected to increase as global supply decreases. Again, the RTO program should position itself as a cost-savings program for households and employers.

Traveler Information & Tools: Social Media & Information Technology

The need for convenient and reliable travel choices was a resounding theme throughout the strategic plan process. Social media, smartphones, and information technology provide opportunity for the RTO program to reach more people with up-to-date travel information. Over the next five years, the RTO program should capitalize on this growing trend to provide improved information that help people bike, walk, carpool, vanpool and take transit throughout the region.

In 2010, RTO conducted a telephone survey and focus groups to assess the travel patterns and awareness of travel choices among residents living in the Portland-Metro region. The study concluded that users were frustrated by having to use multiple information sources to plan their trip. Focus group participants noted the need for the following: (1) smartphone applications that allow users to plan trips with real time information; (2) a Google Maps function combined with Transit Tracker; and (3) text messaging capabilities to communicate with transit agencies. Funding programs to develop information and tools that provide up-to-date and reliable travel information for the region should be a priority in the upcoming grant cycles.

Human Health

The increasingly poor health conditions in the United States provide motivation for active transportation on two fronts: a dire need to improve the health of the nation; and an impetus for businesses to support and encourage active transportation as a motivation to reduce cost (health care cost and improved employee productivity, happiness, and performance).

Metro's employment outreach and collaborative marketing efforts include research on health and active transportation for employees. The current focus is to look at how businesses can improve their bottom lines by promoting active commuting and incentivizing transportation options. Metro also received a TGM Grant for Active Transportation in the summer of 2011. This project will work to improve the region's active transportation network for bicycling and walking. The health benefits of active

⁷ U.S. Energy Information Administration. (2011). "Weekly Gasoline and Diesel Prices." Web. Assessed 19 September 2011. http://www.eia.gov/dnav/pet/pet_pri_gnd_a_epmr_pte_dpgal_w.htm

⁸ U.S. Energy Information Administration. (2011). "Short-Term Energy Outlook." September 7, 2011. Web. Assessed 19 September 2011. <http://205.254.135.24/steo/>

transportation should be a driving selling point for the RTO program and an opportunity to leverage regional partners.

New Regional Initiatives

Multiple agencies and jurisdictions in the Metro region are working on climate action initiatives, local economic development, and the general livability of the region. The RTO program will improve its ability to offer innovative and cost-effective travel choices to the region if it works to align itself with regional initiatives inside and external to Metro.

A primary goal of the RTO program – to reduce dependency on single occupancy vehicle travel – aligns with Metro’s community design objectives to create 20 minute neighborhoods, its climate action plan goal to reduce greenhouse gas emissions, and its transportation efficiency objectives to move people and goods around the region in a safe, efficient, and environmentally friendly manner. The following recent initiatives are particularly relevant to the RTO Strategic Plan update.

- **Introduction of TSMO Concept in 2035 RTP** – The 2035 RTP identifies a Transportation System Management and Operations (TSMO) concept that integrates Travel Demand Management and Transportation System Management programs. This creates an opportunity to integrate transportation demand management and infrastructure efficiency as part of Metro’s overall framework for planning, implementation, and on-going evaluation of transportation programs.
- **Climate Smart Communities** – The Climate Smart Communities project is a three-phase project exploring how the region can continue to create livable communities while meeting the region’s greenhouse gas emissions targets. Transportation accounts for 38% of Oregon’s CO₂ emissions.⁹ The RTO program should align itself with the Climate Smart Communities program and be included as an implementation tool to achieve the strategies outlined in the program.
- **Transit Oriented Development (TOD) Program** – Metro’s TOD program helps to identify and remove obstacles to the creation of transit villages, main streets development, and mixed-use urban centers. The RTO program should work in partnership with TOD projects to ensure residents and employers in these developments are provided with adequate travel options and services.

⁹ State of Oregon. (2004) Oregon Strategy for Greenhouse Gas Reductions: Governor’s Advisory Group on Global Warming, 30.

3 RECOMMENDED STRATEGIC PLAN

This chapter outlines components of a recommended 5-year strategic plan for the RTO program. It consists of two main components: The first section contains a revised mission statement and new performance measures, and updated goals and objectives. This is followed by a second section outlining a recommended funding framework through which the new strategic plan should be implemented.

MISSION, PERFORMANCE MEASURES, GOALS, AND OBJECTIVES

The 2012-2017 RTO Strategic Plan is guided by a revised mission statement that emphasizes the economic, social, and environmental benefits of the RTO program. The emphasis on these strengths of the RTO program will enable it to tie in more effectively to other Metro programs, such as the Transit-Oriented Development, TSMO, RTP, and Climate Smart Communities programs.

Recommended Mission Statement and Performance Measures

The following mission statement addresses the need to tie RTO efforts more closely with other Metro programs by directly linking the mission statement to Metro's overall mission of making a great place.

Make the Portland Metro Region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation, and are environmentally sustainable.

Performance measures are a key component of any strategic plan to track progress towards shared goals, identify opportunities for improvement, and streamline performance evaluation across all programs.

Building on Metro's new triple-bottom-line framework for evaluating performance as part of the RTP, it is recommended that the RTO program articulate its performance in terms of economic benefits, social benefits and environmental benefits. The above mission statement sets the stage for a triple-bottom-line framework within RTO. This framework can be carried through the entire program using a new performance measurement framework.

It is recommended that non-SOV mode-shift be used as the principle performance measure of the RTO program. This measure is recommended over VMR because progress toward all three elements of the triple-bottom-line framework can be derived from it. Furthermore, it is recommended this performance measure be framed with a direct linkage to the RTP, and include a targeted contribution specifically for the RTO program. This recommendation is illustrated in Figure 4. Table 5 provides examples for converting Non-SOV Mode Split into meaningful metrics for communicating benefits in terms of the triple-bottom-line framework.

Figure 4 Recommended Performance Measure with Regional and RTO-specific Targets

Performance Measure	Region-wide Target	RTO-Specific Target
Non-SOV Mode Split	50 percent by 2035	Achieve at least an average 0.5 percent increase per year attributable to the RTO program during the five-year strategic planning period.

Figure 5 Example methods for converting Non-SOV trips into triple-bottom-line measures

	Conversion for reporting on Triple-Bottom-Line performance
Economic Benefits	<ul style="list-style-type: none"> ▪ Convert Non-SOV trips into household cost savings and dollars returned to local economy. ▪ Convert Non-SOV trips into number of parking spaces reduced and multiply by the average cost of parking to demonstrate direct economic savings.
Social Benefits	<ul style="list-style-type: none"> ▪ Use Active Transportation proportion of Non-SOV trips to measure improvements in health. ▪ Convert Non-SOV trips into household transportation cost savings; in cases where the cost savings benefits are localized and housing costs are known, household cost savings could be converted into combined cost of housing and transportation.
Environmental Benefits	<ul style="list-style-type: none"> ▪ Convert Non-SOV trips into Vehicle Miles Reduced and multiply by standard emission rates per VMR to calculate emission savings for specific pollutants.

Recommended Goals & Objectives

The following goals and objectives are recommended to establish a policy framework for RTO program over the next five year planning period. These goals and objectives were developed in response to the issues and opportunities identified in chapter 2.

Objective 1: Align the RTO program with regional growth management and livability objectives

- Objective 1.1 – Link RTO efforts to goals outlined in the Metro Regional Transportation System Plan (RTP).
- Objective 1.2 – Support projects that provide information and services to geographically and socio-economically diverse populations.
- Objective 1.3 – Work with other Metro programs and regional partners to make Travel Options an integral element of every transportation project.

Goal 2: Be a leader in developing local, regional, and national policies that promote walking, biking, transit and high-occupancy vehicle travel

- Objective 2.1 – Develop programs that meet needs in Urban Centers, corridors, and suburban areas.
- Objective 2.2 – Work with local jurisdictions to build local political and staff support.
- Objective 2.3 – Support local jurisdictions in developing and implementing policies that support the RTO mission.

- Objective 2.4 – Measure and evaluate the success of the RTO program to report progress, aid decision-making, and encourage innovation.

Goal 3: Support local partners to engage with employers and commuters to increase the use of travel options for commute trips

- Objective 3.1 – Support local partners to market and provide travel options services to employers and commuters.
- Objective 3.2 – Provide information and technical services to local and regional partners to make the business case for employers to support travel options.
- Objective 3.3 – Address employer needs in transit underserved areas.

Goal 4: Develop tools to support consideration of travel choices and the increased use of travel options for all trips

- Objective 4.1 – Continue a regional collaborative marketing campaign to increase awareness of travel options and reduce drive-alone trips.
- Objective 4.2 – Develop and enhance traveler information tools.
- Objective 4.3 – Provide technical services to local partners to help implement and support the RTO mission.

RECOMMENDED FUNDING MODEL

Recommendations regarding roles, funding prioritization and evaluation – the remaining key issues to be addressed – are encapsulated within the recommended funding model. The following section provides an overview of how each of these recommendations can be integrated as part of a new performance-based funding framework.

Overview

Nationwide, regional TDM programs are funded through a mixture of two generalized funding models: formula funding and discretionary funding. Formula-funding is distributed to specific entities based on prescribed criteria such as number of employers served or some other relevant metric. Discretionary funding models distribute money on a competitive basis pursuant to specific goals or strategies identified by the grant making agency and its partners. Most regions have a blend of formula and discretionary funding with some areas emphasizing one type of funding more than the other. The factors that influence how a region mixes formula funding versus competitive funding hinge on many of the issues and opportunities identified in Chapter 2.

On the one hand, formula funding helps to ensure geographic equity. However, this approach does not ensure that local capacity is available to implement programs. On the other hand, performance-based funding ensures that limited RTO funding is being granted to jurisdictions and organizations with proven support, transportation infrastructure, and the staff capacity to implement. Yet, purely competitive programs have the potential to direct funding to areas and partners with the established capacity to deliver, potentially undermining regional equity objectives.

The challenge is to identify the appropriate blend of formula and competitive funding along with the right mix of roles and monitoring and evaluation measures to ensure regional equity is preserved, important regional functions are adequately funded, and performance is recognized and rewarded.

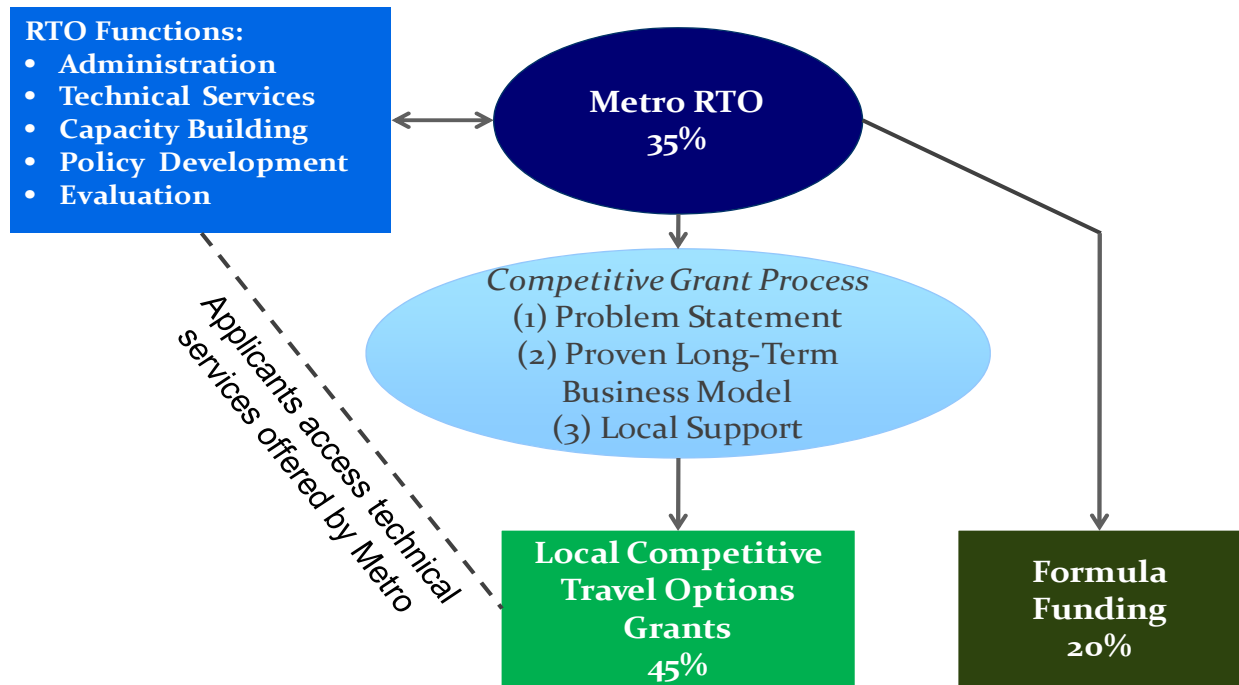
The recommended funding model reflects a careful balancing of the various issues and opportunities to establish a program that will enable the RTO program to maximize its contributions to making a great place. Figure 4 outlines the recommended 2012-2017 program funding structure.

Elements of the Recommended Funding Model

The recommended funding model includes the following key elements:

- Clarification and reassignment of roles for Metro, TriMet, and the RTO subcommittee
- Formalization of formula funding for TriMet’s employer outreach program
- Consolidation of TMA, small grant and individualized marketing grants under a single competitive grant process
- Reallocation of funds to reflect changes in roles and an increase in the proportion of funds directed toward grants and formula grants
- Updates to Metro’s Public Private Partnership policy
- Concepts for integrating these recommendations into the RTO evaluation framework

Figure 6 2012-2017 RTO Program Funding Structure



Benefits of Recommended Funding Model

The 2012-2017 funding structure offers a number of benefits to the RTO program. The competitive grant process outlined in Elements of the Recommended Funding Model

The recommended funding model includes the following key elements:

- Clarification and reassignment of roles for Metro, TriMet, and the RTO subcommittee
- Formalization of formula funding for TriMet’s employer outreach program

- Consolidation of TMA, small grant and individualized marketing grants under a single competitive grant process
- Reallocation of funds to reflect changes in roles and an increase in the proportion of funds directed toward grants and formula grants
- Updates to Metro’s Public Private Partnership policy
- Concepts for integrating these recommendations into the RTO evaluation framework

Figure 6 above will benefit the RTO program in the following ways:

- Proven local support – both monetary and political – will help align RTO efforts with local transportation system plans
- A problem or opportunity statement will help the RTO program align its efforts and funding with programs that directly relate to RTO goals and regional infrastructure investments
- Shifting commuter and rideshare services to TriMet and other partners will allow Metro staff to spend more time building local capacity and providing technical services to the region

Clarification of Roles

Shift Employer Outreach Roles

As part of the new funding model, it is recommended that Metro no longer provide employer outreach and that employer outreach functions be coordinated in a more formal manner within the region. TriMet should take on Metro’s previous functions in this area. Figure 7 below outlines the recommended roles and responsibilities for TriMet.

Figure 7 Recommended TriMet Roles & Responsibilities

Role	Description	Budget
Commuter Program	<ul style="list-style-type: none"> ▪ Implement transportation programs at worksites ▪ Work with employers to implement employer-subsidized transit passes ▪ Help employers comply with the ECO rule 	TBD
Evaluation	<ul style="list-style-type: none"> ▪ Provide ECO data to Metro on a yearly basis 	TBD
Regional Rideshare	<ul style="list-style-type: none"> ▪ Administer a regional vanpool program ▪ Administer the Drive.Less.Connect program ▪ Work with outlying areas with limited transit access to ensure travel options are available 	TBD

As part of defining TriMet’s new roles regarding employer outreach, Metro should work with local partners to define how TriMet should coordinate with partners who are funded through competitive grants to provide employer outreach. In areas where TMAs are established, Metro and TriMet should consider not offer services unless directly requested. It may be beneficial to allow TMAs the first right of refusal for assisting with ECO surveys, providing employer outreach, and connecting employers with regional TO programming.

Focus RTO staff roles

Furthermore, it is recommended that Metro staff roles be streamlined to focus on specific wholesale-level activities to be performed in support of local partners. To ensure that travel options services are distributed equally throughout the region, Metro should dedicate a portion of its staff time to local capacity building, program development, and sharing of best practices with partners around the region.

Metro RTO staff should be deliberate about reaching out to those regions or organizations that do not fare well in the competitive grant process to build local capacity and share best practices. Metro staff should dedicate a percentage of time providing direct outreach to local political leaders and local staff to build support and capacity for TDM implementation at the local level. Metro should also provide needed services, such as website development, GIS mapping tools, and other technical services, to jurisdictions and organizations with limited staffing abilities. Figure 6 below outlines the recommended roles and responsibilities for Metro RTO staff.

Restructure RTO Subcommittee

In addition, it is recommended the RTO subcommittee be restructured. The committee's funding decision making function should be divided from its collaborative functions and these functions should be performed separately. Funding decisions should not be made by an entity that is comprised largely of direct grantees. It is recommended that Metro reassign the grant decision making function of the RTO subcommittee to either a new committee comprised of non-grant recipients (such as higher-level decision makers similar to the group assembled for the Think Tank) or directly to TPAC. Yet, to preserve collaboration, it is recommended the RTO program continue convening and facilitating meetings of RTO grant recipients on a regular basis to coordinate programs and service delivery, to facilitate information sharing, and to disseminate best practices.

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Figure 8 Recommended Metro RTO Staff Roles, Responsibilities, and Budget

Existing			Recommended		
Metro's Role	Description ¹⁰	Budget ¹¹	Metro's Role	Description	Budget
Employer Outreach	<ul style="list-style-type: none"> ▪ Administer multi-modal trip tracker and rideshare matching services ▪ Work with employers ▪ Coordinate local stakeholders to deliver travel options 	\$164,416	Commuter Program	<ul style="list-style-type: none"> ▪ No direct outreach ▪ Consolidated with TriMet employer outreach activities 	\$0
Evaluation	<ul style="list-style-type: none"> ▪ Conduct RTO research, refine performance measures, estimate air quality outcomes 	\$140,513	Evaluation	<ul style="list-style-type: none"> ▪ Conduct RTO research, refine performance measures, estimate air quality outcomes 	\$89,530
General Admin	<ul style="list-style-type: none"> ▪ RTO staff supervision ▪ Approve contracts & invoices ▪ General administrative support ▪ RTO Subcommittee support 	\$134,756	General Admin	<ul style="list-style-type: none"> ▪ RTO staff and program supervision ▪ General administrative support ▪ Support for coordination committee ▪ Policy development, integration with Metro programs and initiatives 	\$149,229
Grant Administration	<ul style="list-style-type: none"> ▪ Manage grants & solicitation process 	\$102,845	Grant Administration	<ul style="list-style-type: none"> ▪ Manage grants & solicitation process (consolidated process) ▪ Approve project scopes, contracts & invoices ▪ Federal reporting 	\$202,061
Regional Vanpool	<ul style="list-style-type: none"> ▪ Manage regional vanpool program 	\$14,638	Regional Vanpool		\$0
Marketing & Communication	<ul style="list-style-type: none"> ▪ Collaborate with local, regional and statewide partners on DLSM efforts ▪ Integrate RTO activities with other Metro marketing & communications efforts ▪ BikeThere! and Walk There! development 	\$135,790	Marketing & Communication	<ul style="list-style-type: none"> ▪ Collaborate with local, regional and statewide partners on DLSM efforts ▪ Integrate RTO activities with other Metro marketing & communications efforts ▪ BikeThere! and Walk There! Development 	\$135,670

¹⁰ The description of current staff roles is taken from "RTO Staff Roles" document emailed by Caleb Winter on September 29, 2011.

¹¹ Budgeted amounts are for staff time only and do not reflect Materials & Services costs to be borne by Metro.

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Existing			Recommended		
Metro's Role	Description ¹⁰	Budget ¹¹	Metro's Role	Description	Budget
Local Capacity Building & Program Development		No current FTE assigned	Local Capacity Building & Program Development/Policy Development	<ul style="list-style-type: none"> ▪ Coordinate with local jurisdictions to build local capacity and coordinate best practices across the region ▪ Develop programs for local jurisdictions to implement (focus on program development for inner city vs. outlying areas) ▪ Coordinate Regional Mobility program activities with RTO work plan ▪ Integrate demand management strategies into projects and other planning activities ▪ Make policy recommendations that specifically support TDM, focus on free parking policy in particular 	\$64,764
Technical Services	<ul style="list-style-type: none"> ▪ Manage traveler information strategies (bike data ridematching) 	No FTE currently specified	Technical Services	Offer the following services to regional partners through grant process: <ul style="list-style-type: none"> ▪ GIS mapping & analytics ▪ Survey administration ▪ Communications/marketing 	0.00 M&S only
TMA Administration	<ul style="list-style-type: none"> ▪ Manage public-private partnership program 	\$83,037		<ul style="list-style-type: none"> ▪ Integrated into Grant Administration 	\$0
TOTAL Personal Services Budget		\$775,995			\$641,254

Formula Funding

In return for an expanded formalized role in employer outreach, TriMet should be made eligible for a larger share of formula funding as part of a formalized agreement between TriMet and Metro. TriMet's formula funds should be made subject to specific performance criteria spelled out as part of its contract with Metro to receive formula funds. Reporting and evaluation requirements for this contract should be developed following the principles outlined for competitive grants, described below.

Consolidation of Competitive Grants

The process for applying for RTO funding should be consolidated as part of an expanded competitive grant program that encompasses funding for TMAs, individualized marketing, and small grants. While funding priorities and funding levels may change from year to year¹², the process for applying for funds should be governed by this strategic plan's goals and objectives and the funding framework identified herein.

Eligibility

Eligibility should be determined as follows:

- 1) Does the proposed investment contribute to increasing use of Non-SOV modes? This should be established through a written project narrative that provides a logical explanation demonstrating how the funded efforts will contribute to reducing Non-SOV modes.
- 2) Does the applicant demonstrate interest and willingness? This should be established through a written project narrative that identifies the specific opportunity or problem to which the applicant is responding.
- 3) Does the applicant have local support? Minimum match requirements should be used as base-level eligibility criteria. If investments continue to be funded with CMAQ funding, the minimum level should be set at CMAQ thresholds. Higher local match levels can be required for higher-risk efforts or rewarded through extra points in the scoring process.
- 4) Does the applicant have the capacity to implement?

Selection Criteria

The current selection criteria used for Metro's small grant program can serve as a starting point for defining selection criteria for the consolidated grant program. The primary modification that should be made relates to Criterion # 6. Criterion # 6 should be eliminated (because of the previously identified issues associated with the previous return on investment framework) and replaced with a series of criterion that reflect the performance measures identified in this strategic plan.

¹² Funding amounts may be governed by external funding decisions such as the existing policy directing \$500,000 toward Individualized marketing every two years.

Evaluation & Performance Measures

The RTO evaluation process should be redefined to align the program investment decisions with the new performance measure identified in this strategic plan. However, it is recommended that the majority of individual recipients not be required to track or estimate their specific outcomes (i.e. direct contributions to the key performance measure), but instead, demonstrate how their funded activities are tied to the performance measures. This can be accomplished by requiring recipients to identify as part of their application and report on precursors that are known to contribute to advancement of the performance measure.

Conveniently, most of the work required to accomplish this has already been completed. Portland State University developed a robust evaluation framework for Metro’s RTO program as part of the last biennial evaluation. It identifies a matrix of precursor metrics for a wide range of RTO investment types. The precursors identified in this list (a readable version of Figure 9 is included as Appendix X) include a range of related events that contribute to the advancement of the key performance measure. These precursors include service outputs, awareness, participation, and satisfaction.

As part of the recommended funding model, recipients should be asked to select from a menu (to be adapted from PSU’s matrix of precursor metrics) the precursor indicators they will track pursuant to the performance measures their project is designed to achieve. The expected level of reporting should be based on how much funding is sought, with an increasing level of reporting for higher levels of funding (see Figure 10). The framework and an example are illustrated in Figure 11, below.

Figure 9 PSU Matrix of Precursor Metrics

Contracted Reporting Requirements

The reporting and evaluation process should reinforce the performance-based funding feedback loop by requiring that grant recipients report and meet the measures they commit to as part of their work plans. Figure 12 below illustrates how this feedback loop ties the evaluation framework back to the RTO goals.

Figure 10 Recommended Reporting Requirements

Funding Level	Reporting Requirements	Notes
\$ 0 - \$20,000	Outputs	Recipients of small grants should not be required to report on outcomes.
\$20,000 – \$100,000	Outputs, Awareness, and Participation	Recipients of medium-sized grants should be expected to conduct more rigorous evaluation, stopping short of estimating outcomes.
\$100,000 +	Outputs, Awareness, Participation, Satisfaction, and Outcomes (where appropriate)	Recipients of large grants should be required to conduct even more rigorous evaluation including when appropriate estimates of direct and indirect impacts on the relevant

		performance measures.
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Figure 11 Excerpt from PSU Evaluation Framework

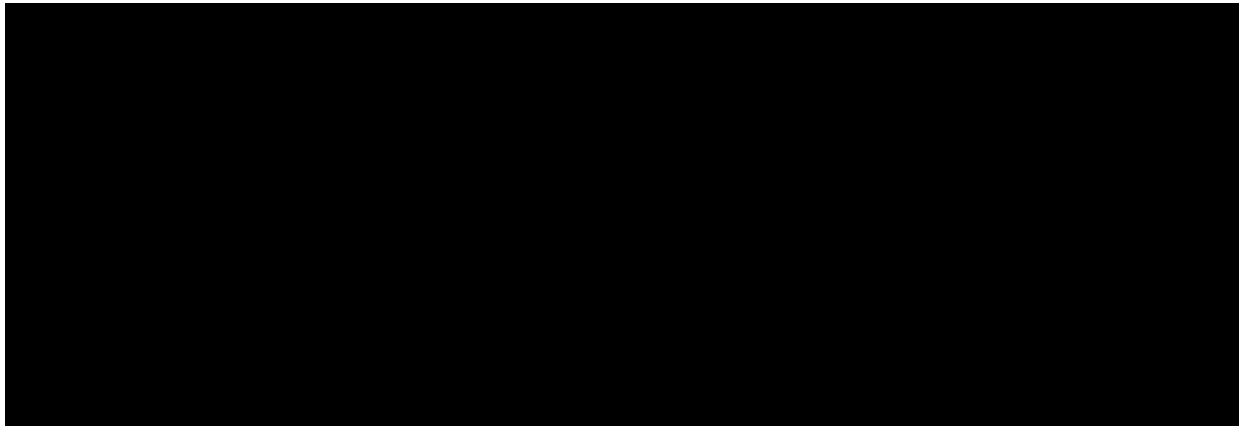
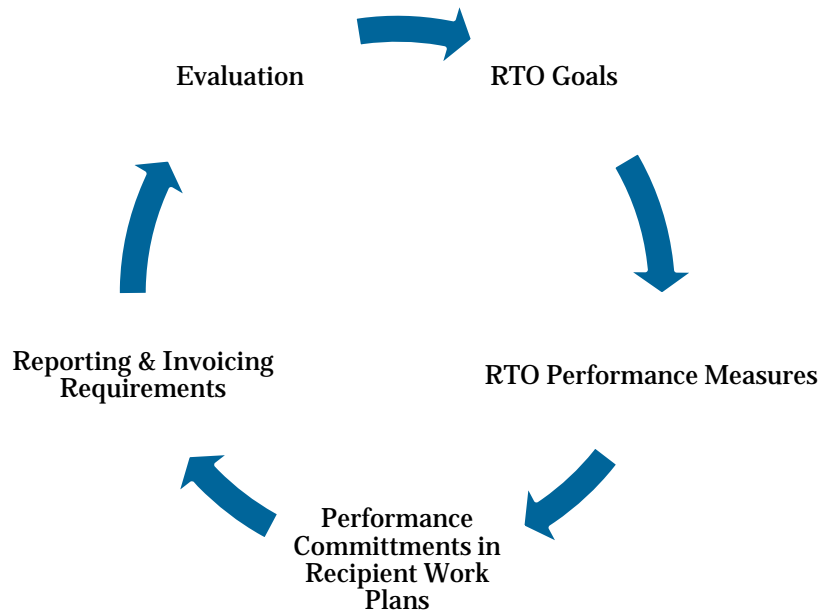


Figure 12 Diagram of Relationships among RTO Goals, Performance Measures, Reporting and Evaluation



Reallocation of RTO Funds

These recommendations are expected to reduce the total percentage of RTO funds dedicated to administration, oversight, and Metro-provided employer outreach from 41 to less than 35 percent. A portion of these funds should be redirected to TriMet to support expanded employer outreach functions and the remaining should be dedicated to competitive grants. Overall, if these recommendations are adopted, the total share of funding for formula and competitive funding programs is expected to increase from approximately 59 percent currently to over 65 percent once fully implemented. This reallocation of funds should improve the overall cost effectiveness of the RTO program through improved economies of scale, reduced duplication of effort, and increased spending on ground-level activities.

Updates to Public Private Partnership Model

The most significant change is the recommended elimination of funding specifically for TMAs. It is recommended that TMAs continue to be eligible for funding, but funding for TMAs should be channeled through the new consolidated competitive grant program. The competitive model will eliminate guaranteed funding for TMAs¹³. While TMAs roles need not change, the recommended funding model may necessitate changes in the way TMAs position themselves. The recommendation to eliminate Metro’s role in employer outreach while also increasing and formalizing coordination of other funded partners roles in employer outreach should help TMAs better define their role vis-à-vis the private sector.

NEXT STEPS

The content of this chapter may need to be adapted and formatted by Metro staff to incorporate the recommendations into a format that is useful as a standalone document. From a structural standpoint, the content in the recommended strategic plan is different from the previous strategic plan in several important ways. Figure 11, below highlights the key differences in the structure of the two strategic plans. This information is offered to assist Metro staff in assembling a standalone strategic plan.

Figure 13 Comparison of Content and Structure of 2008 – 2013 versus 2012 – 2017 Strategic Plans

2008 – 2013 Strategic Plan	2012 – 2017 Strategic Plan
Part 1 - Executive Summary	None – An executive summary for the standalone strategic plan will need to be crafted by excerpting elements of Chapters 1 and 2 of this report.
Part 2 - Mission and Policy Framework	Mission, Goals, Objectives and Performance Measures – Some of the explanatory text may not be needed for a standalone strategic plan.
Part 3 - Program Priorities	These elements are not identified as part of this strategic plan. Instead, a recommended funding framework is offered along with recommendations for eligibility & selection criteria, modified roles for program partners, and improvements to the existing evaluation process.
Part 4 - Regional Travel Options Programs and Services	
Part 5 - Goals, Objectives and Strategies	

¹³ While the current funding policy is technically considered a competitive process, the recommended model is explicitly competitive whereas the current funding policy implies a level of on-going support.

Appendix A Interview Summary

Appendix A documents, at a high level, the information obtained through the stakeholder interviews conducted for the 2012 – 2017 RTO Strategic Plan Update. The information presented is organized around four sets of questions, each with a list of typical responses, followed by a synthesis of the feedback received. The synthesis section reflects the reviewers'¹ interpretation of what was said and serves as documentation of the insights gained through the interviews.

The questions asked are organized around the following four topics:

- Part 1: Mission and desired outcomes
- Part 2: Strategies
- Part 3: Prioritization
- Part 4: Evaluation

Four meetings were held with specific groups for whom similar questions were asked, but because these groups were distinct from the other organizations interviewed their responses are reported separately. These include:

- Part 5: TMA Feedback
- Part 6: State Feedback
- Part 7: Business Feedback
- Part 8: University Feedback

Feedback and insights are summarized below.

PART 1: MISSION AND DESIRED OUTCOMES

The first set of questions relates to Metro's mission and the RTO program outcomes. These questions were designed to help the evaluators understand how people perceive the RTO program mission, and to ask whether the mission should be modified.

Questions and paraphrased responses:

What is the Metro RTO program mission?

- Reduce SOV trips and VMT
- To provide seed money to initiate strategies to support alternative modes of transportation, particularly regarding the softer side (not infrastructure)
- Promote alternative modes; increase non-SOV mode split in the region
- Public private partnerships
- Promote alternatives and choices for travelers that results in a more efficient transportation system

¹ "Reviewers" refers to the authors of this memorandum.

- RTO mission is very aligned with Metro’s mission in the Portland area – compact communities, travel options, etc.

What should be Metro’s RTO program mission?

- Most interviewees noted that the RTO mission was the right mission
- TMAs were the only group that mentioned economic development as part of the RTO mission – this is the only way they will get through to the business community, they said.
- TriMet would modify the mission slightly by saying that our mission is to manage and execute a program that has efficacy that we can track in terms of reducing SOV VMT and CO2. They view themselves as more outcomes focused.
- Suburban interviewees felt the RTO mission is less aligned with outlying areas because access to travel options is very different in these areas compared to a central-city location.

What are the historic outcomes of Metro’s RTO program?

- VMT Reduction
- Increased use of non-SOV modes
- Increased utilization of bike lanes and trails
- Reduced transportation cost for households

What should be the outcomes of Metro’s RTO program?

- Should not be so focused on VMT alone. Other outcomes are also important.
- Awareness
- How well does each program fit into other regional goals and programs?
- Shift in community culture
- Long-term relationship building with employers
- RTO needs to be more results driven
- Relationships
- Community support – a TMA can’t exist without broad community support

Part 1 Synthesis:

Interviewees generally understand the RTO mission and agree that it is the right mission. Some suburban participants felt the mission is Portland-centric and not well aligned with suburban areas where access to travel options is very different relative to Portland. However, some of the suburban interviewees were also less familiar with the RTO program, and therefore, were less specific in how they define Metro’s mission. While one interviewee (a large regional organization) felt the mission needs more emphasis on evaluation, a majority of interviewees expressed an interest in seeing a softening of the RTO mission to include recognition of less measurable outcomes relating to awareness, relationship building and culture-change.

PART 2: STRATEGIES

The following set of questions was designed to generate input from interviewees on the kinds of strategies they feel should be pursued to achieve the desired outcomes. The feedback encompassed a fairly broad discussion of barriers, ideas for improving the RTO program, and ideas for modifying the role played by the RTO program.

Questions and paraphrased responses:

What barriers do you face when pursuing important strategies?

- Metro is risk adverse; they aren't willing to fund the innovative programs
- Talking to employers is a challenge, especially when there is ample free parking: Employers simply see no value in the RTO program when there is no perceived transportation problem. Having something to sell to employers is essential – why would they want to pay a TMA? TMA's need to provide a product that is valued by employers.
- Timeframe for individualized marketing program (one year) was too short for Gresham
- Funding for evaluation: Imbalance between staff availability in Portland vs. in smaller jurisdictions to produce the same reports
- Political leadership/will
- Public perception
- Eco rule is in effect, but cities aren't given the data from the survey in any useful manner – there's a communication barrier
- Infrastructure (i.e. transit options, sidewalks along transit routes, etc).
- No last mile connectivity

What ideas do you have for improving the RTO program?

- Identify a specific strategic goal relating to smaller cities
 - Speak the local language
 - Suburban communities across the board felt that Metro was too Portland-centric
 - Tailor programs and grant opportunities to the suburbs so that they aren't competing with Portland and others.
- Funding flexibility (interviewees recognize this may be out of Metro's control)
 - Need for funding to pay for operations and infrastructure
 - Local match funding should not be subject to restrictions
- Communication to grant recipients: clearly define expectations for invoicing and evaluation; things seem to change every year
- RTO Subcommittee:
 - Funding and collaboration roles of subcommittee should be separate
 - Current RTO Subcommittee is useful for collaboration effort

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- Funding decisions should be a higher executive leadership level
 - All grant recipients should have to report on progress to a higher executive leadership level to improve accountability
- Program expectations
 - Don't treat all of the programs the same
 - Standards and evaluations requirements for programs just starting out should be different than already established programs
- Improve outreach to outlying areas:
 - RTO grants go to “people-in-the-know:” Several interviewees from outlying areas felt that the organizations that receive funding tend to be the ones with representation on the RTO sub-committee. There was a feeling that more could be done to reach out to organizations that typically don't apply for RTO funds.

What should Metro's role be?

Role	Description	Wholesale	Retail
Technical Expertise and Assistance	<ul style="list-style-type: none"> • Provide umbrella public awareness campaign; TMAs will provide more focused support. • Marketing support to TMAs • Mapping and GIS help to TMAs • Website development assistance • Provide templates for evaluation, surveys, and invoicing to ensure that expectations are clear and time is not wasted 	X	
Funding	<ul style="list-style-type: none"> • Provide funding for RTO program 	X	
Political backing	<ul style="list-style-type: none"> • Make case for RTO programs to political leaders at the local level. 	X	
Program Development and Best Practices	<ul style="list-style-type: none"> • Provide a leadership/mentorship role in training and educating local jurisdictions. • Dedicate a Metro staff person to be the local representative so that people know who to turn to for help. • Convene regional RTO players to share best practices and learn from each other. • Build capacity at front end of projects to help the program tell its story in the local community. • Define what programs work in the suburbs vs. in Portland 	X	
Define Regional Roles	<ul style="list-style-type: none"> • Clearly define who is doing what to avoid duplication of efforts (example: employer outreach) 	X	
Be the Face of Metro	<ul style="list-style-type: none"> • Opportunity to partner with TOD and other sustainability efforts at the business level 	X	
Policy Driver	<ul style="list-style-type: none"> • Push policies that help people on the ground do their job (i.e. making connections to the land use planning dialogue, providing a regional parking policy, etc). 	X	

Part 2 Synthesis:

- **Mentor vs. funder relationship:** Some of the larger organizations (TriMet, Portland, Lloyd TMA) expressed a desire for Metro to step back and simply serve as an “investor” in their program. These organizations (representing less than a quarter of interviewees, but a large share of the Metro population) believe their programs serve in a leadership capacity and therefore should be supported with fewer strings attached. Other less established programs (tend to be more suburban in nature) expressed a desire for Metro to help them build capacity within their organizations, provide technical support, and build political will in their communities. Other supportive functions requested include:
 - Regional evaluation & surveying: Several interviewees felt Metro could play a larger role in conducting regional surveys. It was suggested that this would help improve the effectiveness of evaluation while also reducing the amount of time and percent of project budgets individual grant recipients spend on evaluation.
 - Technical Support: Many organizations expressed an interest in Metro providing more technical assistance in GIS, Websites, information sharing & dissemination of best practices.
- **Wholesale vs. retail:** There was a nearly unanimous desire to see Metro perform these desired functions in a wholesale capacity. Meaning, essentially no one expressed an interest in seeing Metro directly delivering TDM programs.
- **Distribution of functions between TMAs and Metro:** There was disagreement regarding Metro’s role relative to TMAs’ roles in delivering RTO programs. One of Metro’s staff questioned the TMA model, and suggested TDM be delivered through a similar mechanism as that used to deliver support for Transit Oriented Development at Metro. For its TOD program, Metro employs in-house staff with expertise that Metro then shares with the rest of the cities. This interviewee expressed an opinion that TMA’s unnecessarily dilute the expertise of the RTO program staff and each other. Therefore, the suggestion was made that a centralized person at Metro might be more effective. Conversely, from the perspective of a TMA, the opposite opinion was expressed. TMA’s expressed concern that Metro dilutes the value TMAs offer to employers by “giving free product.” Functions such as employer outreach and assistance with surveys are viewed as one of the primary sources of value TMAs offer employers. TMAs expressed concern that these duplicative roles make it difficult for TMAs to demonstrate value and increase membership. Both perspectives point to the need for clarification regarding the distribution of roles among Metro staff and TMAs.
- **Communication:** There appears to be a need for more consistent communication about what projects are funded and what level of evaluation is expected for new projects relative to proven efforts. There also appears to be an opportunity for Metro to be more explicit in expectations for grantees, particularly relating to invoicing and reporting requirements.

PART 3: PRIORITIES

The following questions were designed to measure the level of agreement and disagreement regarding how funding should be prioritized.

Questions and paraphrased responses:

What programs are more important and should be preserved, or are less important and should be considered for elimination?

During each interview we asked interviewees if there were specific programs provided by Metro that are important and should therefore be preserved, or are less important and should therefore be considered for elimination. Not all of the interviewees were sufficiently familiar with the RTO program to confidently answer this question. The results are tabulated in Figure A-1 below.

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Figure A-1 What programs should be preserved, eliminated?

	Important			Not Important		
	#	Type	Notes	#	Type	Notes
Drive Less Save More	2	Large	<ul style="list-style-type: none"> Umbrella structure should be preserved. 	2	Mixed	<ul style="list-style-type: none"> DL/SM shouldn't be the only brand. Billboards seem ineffective – we could do program work with that funding.
Employer outreach	3	Mixed	<ul style="list-style-type: none"> Employer outreach is related to other RTO programs and helps strengthen RTO link with other Metro services Employer outreach has proven to work. 	1	Large	<ul style="list-style-type: none"> Duplicate roles should be eliminated. Metro shouldn't be performing in this capacity - it is duplicative of TriMet and TMAs.
Individualized marketing	1	Small	<ul style="list-style-type: none"> Direct, individualized marketing is proven to work. 	1	Small	<ul style="list-style-type: none"> One-size fits all approach doesn't work; needs to be tailored.
Last-mile connections (e.g.. shuttles, sidewalks)	2	Mixed	<ul style="list-style-type: none"> Tualatin shuttle has been a success because it serves a specific need. Shuttles are needed to effectively link people with travel options in suburbs. 	0	N/A	
Region-wide resources (e.g. Bike there!, Walk there!)	2	Large	<ul style="list-style-type: none"> Metro should provide more region-wide resources. 	0	N/A	
RTO marketing committee	1	Small	<ul style="list-style-type: none"> Helps focus the group on specific campaigns. 	1	Large	<ul style="list-style-type: none"> Metro should be the expert and provide leadership in defining how to communicate – there is no need for a sub-committee to do this.
RTO subcommittee	1	Small	<ul style="list-style-type: none"> Forum for regional providers to get together, share information, etc. 	2	Mixed	<ul style="list-style-type: none"> Subcommittee role needs to be reevaluated; funding decision making function seems to conflict with information sharing/collaboration function
Small grant programs	2	Small	<ul style="list-style-type: none"> Where else would we go for this kind of funding? Allows jurisdictions to come up with creative short-term projects. 	1	Large	<ul style="list-style-type: none"> These seem to be a waste of money. We should invest in places we know get a return on investment.
Tabling at events (Metro RTO)	0	N/A		2	Mixed	<ul style="list-style-type: none"> Metro should leave this to RTO funding recipients. Depends on the event - needs to have an effect beyond publicity.
TMA funding	2	Small	<ul style="list-style-type: none"> TMAs provide an appropriate level at which to engage businesses. Booster grants should be converted to regular funding to reflect the reality that all TMAs get this funding and it does not serve the “booster” function. 	1	Large	<ul style="list-style-type: none"> Booster grants should be reduced by one to create competition. TMAs dilute efficient delivery of services - consider centralizing things under Metro similar to TOD program.
Vanpool, carpool programs	2	Small	<ul style="list-style-type: none"> Drive Less Connect is exciting and promising - run it long enough to show success. Vanpool and carpool programs are important for suburban areas with fewer travel options. 	3	Large	<ul style="list-style-type: none"> RidematchNW has not been effective. Portland doesn't have the right infrastructure to support this (e.g. HOV lanes, etc).
Not sufficiently familiar with RTO programs to comment	6	Mixed	<ul style="list-style-type: none"> Mostly suburban organizations 	8	Mixed	<ul style="list-style-type: none"> Mostly suburban organizations

How should funding be prioritized?

- If it's going to be a regional program, then it needs to be equitable
- Set aside money to provide facilities/infrastructure where there are none
- Focus on the suburbs
- Flexibility in use of funds would be helpful
- Portland is having to train other jurisdictions on how to do Sunday Parkways, yet Portland didn't get money for Sunday Parkways this year
- If Metro RTO Committee stuck to the book of what they wanted to do (i.e. reduce VMT & SOV mode split), all the money would come to the City of Portland, Lloyd TMA and TriMet.
- Need a higher threshold of commitment in order to be eligible for funding
- TriMet just gets entitlement money – there needs to be more reporting requirements to get this money
- Invest in corridors so that RTO mission is in line with TSMO plan
- Invest in bigger projects to get more bang for their buck
- Money should be based on expected outcome
- TriMet wants to start a residential program to complement outreach to employers program; but money would have to be taken away from somewhere else in the RTO program
- Dedicate 90% of money to programs you know work; 10% to experimental programs
- Projects should be allocated based on cost per result
- Focus more money on TMAs because of their link to the private sector

Part 3 Synthesis:

- **Areas of Disagreement:** The greatest level of disagreement surrounds DLSSM and funding for vanpool and carpool programs.
 - Vanpool & Carpool Programs: Large organizations (Metro, TriMet and the City of Portland) tend to see less value in vanpool and carpool programs, while smaller suburban organizations (Cities, Counties and Suburban TMAs) see more value in these programs.
 - Drive Less Save More: Not all organizations agree on the value of the Drive Less Save More Campaign. Some organizations appreciate the umbrella structure while others find it difficult to translate a regional message locally.
 - Small Programs: funding for small programs was listed by at least two organizations as important while at least one organization suggested this is less important.
- **Areas of Agreement:** While not always unanimous, there are several areas where multiple organizations expressed the same or similar feelings about a single topic. These opinions relate to employer outreach, TMA booster funding, the RTO sub-committee and individualized marketing
 - **Employer Outreach:** Participants generally agree that employer outreach is effective. The organizations that expressed concern in this area felt there is

duplication in how employer outreach is being performed, and that Metro shouldn't be serving in this capacity.

- **TMA Booster Funding:** Multiple organizations expressed concern that funding for TMAs is important but that booster funding needs to be eliminated. The motivations for eliminating booster funding are mixed. Nearly all organizations that expressed an opinion about TMA funding feel that the booster funding is a misnomer – that its intended purpose of providing support for singular activities is a falsehood. One organization suggested dropping the number of booster grants by one so that there is competition for the funding. Other organizations recommend reclassifying the funds as recurring to reflect the actual function.
- **RTO Subcommittee:** While not all organizations expressed a strong opinion about the importance of the RTO subcommittee or lack of thereof, many of the organizations and individuals interviewed expressed concern that the RTO subcommittee is dysfunctional. This feeling largely stems from the fact the RTO subcommittee serves the dual roles of making funding decisions and serving as a collaborative forum. These functions appear to be at odds and point to an opportunity to revisit the RTO subcommittee structure.
- **Individualized marketing:** Organizations generally agreed that individualized marketing can and does work when it is appropriately tailored to the area. The one organization that expressed a lower priority for individualized marketing felt that Metro pressed for a one-size-fits-all model; their feeling was that a tailored approach would have been more effective.
- **Communication:** A large number of organizations (mostly suburban) indicated they are not sufficiently familiar with the RTO program to comment on what should be preserved or eliminated. These organizations tended to be the same organizations that were less familiar with the RTO mission. This lack of familiarity with the program in suburban communities points to an opportunity for Metro to do more to publicize the RTO program in outlying areas.

PART 4: EVALUATION

The following questions were designed to gauge what role evaluation should play in the RTO program.

Questions and Responses:

What role does evaluation currently play in Metro's RTO program?

- Interviewees noted that evaluation took the following amount of their budgets: 30%, 50%, 60%
- Inequity exists in the number of staff available to do evaluation at small jurisdictions vs. larger ones
 - RTO shouldn't hold everyone to same standard
- One interviewee said it wasn't worth applying for anything less than \$200k because the reporting requirements take so much of the budget

- If a strategy works, why do we have to prove it over and over again? Instead, focus on best practices – proof of concept by looking what other programs and places have had success with
- Multiple interviews used the term “micromanaged” when discussing Metro’s evaluation process
 - No other programs get this type of scrutiny; if you build a highway you don’t have to prove how many cars will be on the road
- Evaluation should be less based on outcomes – look at other things more creatively especially in communities where infrastructure isn’t even there yet
 - RTO is in the business of shifting culture – but there is no way to measure that; need to have a realistic view of what we can and can’t measure
 - Reports need to be valuable and tangible; but the problem is that the results are often very intangible
- How do you quantify VMT? This was a common question/comment in the interviews
- One grant applicant was denied because they couldn’t prove anticipated VMT reduction – they were applying for a feasibility study

What ideas do you have for improving the evaluation process?

- Link efforts to reasonable outcomes – can’t be sure bike map leads to direct increase in ridership, we have to assume
- General consensus was that only 10% of budget should be spent on evaluation; one interviewee said 20% but that it would depend on if the program was established or not
- Establish a financial threshold: under X amount should have no strings attached
- After proof of concept (individualized marketing for example), evaluation should be less stringent
- Evaluation criteria should be useful to the community, not just to please Metro

Synthesis:

- **Evaluation:** Larger more developed organizations (i.e. City of Portland and Tri-Met) indicated a preference for a more results driven process. Smaller organizations that are less developed (suburban constituents and smaller grant recipients) expressed a need for a program that allows for less rigorous or more flexible evaluation during early stages of development.
- **Are we measuring the right things?** Several organizations questioned whether Metro’s evaluation framework is focused in the right areas. “Softer” outcomes such as relationships, and culture shift were suggested as important outcomes that should be measured. TMAs in particular suggested measures that link the RTO program to broader community goals including economic development.
- **Proof of Concept Vs. Experimental Projects:** Flexibility in evaluation was a common theme heard in the interviews. Particularly regarding the level of evaluation for project at varying phases of their life-cycle. Evaluation is important, but a one-size fits all approach may not be appropriate. There appears to be a need and opportunity to allow evaluation measures to be defined on a project-by-project basis.

PART 5: TMA RELATED FEEDBACK

The following notes are from meetings with closed TMA's and the TMA directors meeting.

Closed TMAs

- North Clackamas TMA:
 - Metro didn't agree to expand the TMA's boundaries
 - Metro shouldn't use regional centers as TMA criteria, they should use size of business population
- Clackamas TMA:
 - They could not show changes in Eco survey data – TMA couldn't make the businesses fill out the Eco survey; they tried to do their own survey, but Metro seemed like it was the Eco survey or nothing; no flexibility in showing how their own programs were effective
 - TMA was geographically limited – needed to include the Milwaukie Industrial District so that they could include the Eco-affected employers – you can't make the employers fill out the survey

TMA Directors' Meeting

- Gresham TMA was created in the downtown region but majority of employers are in industrial area of town; Metro approved Gresham to expand to industrial area.
- A TMA is just a business association. We're not doing transportation to improve the air; we're doing transportation because it will save us money and make us profit.
- From a TMA perspective, transportation is just an avenue for economic development. We need to keep this in mind when discussing the objectives and outcomes of the RTO program.
- TMAs want a real product from Metro – TMA's need to provide a service that is valued by employers. Without a valued service, it is very difficult to recruit new members. There is a feeling that Metro could do more to provide this "real product." However, TMA directors were not sure what the product is or should be. Suggestions included GIS mapping, and surveying/evaluation. TMA's should deliver the product, but Metro should help develop it.
- TMAs don't want to be part of DLSSM or any regional brand; instead, Metro should leverage the individual brands of TMAs.
- Metro grants drive the product instead of the people on the ground and the market driving the product – it should be the other way around.
- TMAs feel they are being asked to spread Metro's brand (like rideshare, DLSSM, etc) but don't get any more money to do this; giving a grant to a TMA is cheaper than hiring someone at Metro to do that job.
- Booster grants:
 - The Booster grant is a misnomer – we all rely on it to operate so we play games to get it .

- Booster and regular grants were never intended to provide enough money to operate a program; private sector match was expected but doesn't happen.
- TMAs need to create something of value that isn't duplicative of something that TriMet or Metro is already providing (outreach to employers). TriMet and WTA both work with Nike, for example.
- TMAs should not be held to the same standards – the built environment is so different for each TMA.
- Employers don't see value of RTO program.
- WA County needs to be split up into a few different TMAs – how does one person cover this large territory?

Part 5 Synthesis:

- **Duplicate functions:** In theory, TMAs are expected to demonstrate sufficient value to the private sector such that after the three-year startup period the effective TMA will be adopted into the community as a valuable asset with no need for public subsidy. However, many TMAs believe they are not able to demonstrate sufficient value because many of the valuable services they offer are also offered for free by TriMet and Metro.
- **TMA boundaries & geographic coverage:** At least two TMAs reported being limited by Metro in their geographic coverage. They reported that the inability to reach out to larger employers outside their immediate district has hampered their ability to develop membership. Also, because many of the employers within their district tend to be small (and therefore not subject to ECO reporting requirements), it is difficult to report success using the ECO survey framework.
Conversely, another TMA feels their geographic area is too large to cover effectively. In order to maintain revenue, they must focus on current members, which makes it difficult to reach out to other areas in the county where efforts could be made to improve non-SOV mode splits.
- **Funding related issues:** Essentially all TMAs (as well as other non-TMA stakeholders) lamented the booster grant as a misnomer: The feeling is that the intent of the innovation booster grant approved in the 2002 Metro Council resolution is not being carried out and the booster grant is actually serving as a life-line for most of the TMAs. In addition, funding for TMAs moving forward is likely going to become increasingly difficult to secure and maintain. TMAs are going to be hard-pressed to sustain their membership as businesses scrutinize their resources and expenditures. From the public sector the funding situation is even more dire.
- **Regional marketing:** Not all TMAs are supportive of the Drive Less/Save More campaign. They feel it is important to be able to distinguish their brand from the regional brand. One TMA commented that the “Private sector doesn't see value in the RTO program” and suggested TMAs are needed to articulate the benefits of TDM efforts to the private sector. Another TMA suggested businesses – especially in the outlying areas – distrust Metro and feel “non-SOV modes” are a “Portland-thing.” In these areas, TMAs report they have made inroads with the private sector by building relationships on a one-on-one basis in a way that Metro or TriMet wouldn't have been able to do. This issue of local areas expressing a desire to convey a local brand or message was echoed in other non-TMA meetings with suburban stakeholders.

PART 6: STATE FEEDBACK

The following notes are from a meeting with State of Oregon representatives.

State Meeting Summary

- In the next few years, cities in the region will be completing their TSPs. RTP requires them to look at capacity last; therefore jurisdictions will be looking to Metro to help them with the travel options piece.
- State reps noted that it was difficult to call out what Metro had accomplished vs. what PBOT had accomplished; lines between two agencies are blurry.
- RTO needs to be better integrated into other Metro programs.
 - RTO should be aligned with RTP – align funding with corridor investments.
- As TMAs succeed, maybe they should get less money from Metro.
- RTO Subcommittee needs more rigor.
- Evaluation: need flexibility when evaluating different types of programs.

PART 7: BUSINESS FEEDBACK

The following notes are from meetings with businesses in the region. A total of eight businesses of varying size and geographic location were interviewed.

Business Meeting Summary

- Mode split
 - Predominantly SOV
 - Carpooling is popular choice, especially for those businesses with limited TriMet service
 - Transit is close by, but doesn't align with early morning or late shifts
- Barriers
 - Transit service
 - Does not align with early morning or late shifts (6 employers said this).
 - Too many transfers to make it efficient to use transit
 - Partnership between CTRAN and TriMet is crucial; employees used to bus in from Washington when the passes were the same; now it's too expensive (2 employers said this)
 - One employer also noted that the partnership between TriMet and SMART also needed to be improved; employees traveling to Wilsonville are unable to use the discounted TriMet pass because they are in the SMART zone
 - Parking
 - Free parking to employees does not give them much incentive to switch modes (2 employers said this)

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- One business noted that parking restraints onsite was prime motivator to push non SOV options
- RTO Mission
 - Needs to better reflect the needs of the outlying areas, not just the core
 - RTO is biased to Portland
 - Washington County is growing to be the economic engine of the region – needs more attention
 - Mission should focus on education and convenience – focus on the ease, not the outcome
- What Businesses Need
 - Make the business case: health care cost savings, motivation to reduce car congestion in order to move freight more efficiently
- Strategies that Businesses Use to Shift Modes
 - Give free parking, but incentivize people who don't drive by giving them iPods
 - Onsite showers and bike lockers
 - Subsidized TriMet passes
 - TMA put together a “welcome” kit for new employees to show how they can get to work using alternative modes
 - Monetary incentives
 - Commute Club
 - Carpooling
 - Metro's Guaranteed Ride Home program
- What Metro Can Do
 - Vanpool coordination (4 employers said this)
 - Hard to get off the ground without coordinating with other employers – it's just not cost effective
 - Vanpooling needs more attention from Metro
 - Shuttle managed by Metro that would link up to multiple employers
 - One employer mentioned that a shuttle from WES to industrial areas would be particularly helpful
 - Don't offer free services that the TMAs are trying to get paid to do
 - TMAs should be the sales force and actors of larger scale programs from Metro
 - Metro should be centralized service provider to enable the TMAs
 - Better define who does what in the region – the lines between Metro, TriMet, TMAs, PBOT are blurry (3 employers said this)
 - Need diverse strategies for a diverse region
 - Carsharing might be one solution (2 employers said this)
- Other Comments:
 - Metro is seen as Portland-centric entity

- There is a real dichotomy between the West-side and downtown: people want to live in Portland, but high-tech jobs are in Hillsboro and other outlying areas – RTO needs to help address this

Part 7: Synthesis

The biggest theme from the business interviews was the need for better transit service. In most cases, transit service is available, but it does not align with shift times. Vanpool coordination was also noted as a place for Metro to play a role. Metro could serve businesses by coordinating a vanpool or shuttle that would serve a cluster of businesses.

Businesses also noted how helpful it was to talk to each other during these interviews; Metro could work with TMAs to coordinate a “business roundtable” for businesses in close proximity to each other. There is an opportunity for businesses to team on carsharing and vanpooling activities, in addition to having a bigger impact and voice when approaching TriMet about needed services.

PART 8: COLLEGE/UNIVERSITY

The following notes are from a meeting with College and University representatives.

College/University Meeting Summary

- Barriers
 - People can’t use the WES system because of night classes
- Familiar with RTO brands, such as Discover Wilsonville, but didn’t know that these were RTO programs
- Didn’t know who they would contact at Metro for help
- What Metro can do:
 - Help Universities put packets together for new students on how they can get to school
 - PCC: someone from Metro should serve on their transportation committee – they need the regional perspective.
 - PCC should have one contact at Metro to help them

Metro should do an individualized marketing approach for PCC students.

Appendix B Landscape Scan

The landscape scan provides an overview of economic, environmental, and societal trends that have taken place since the 2008-2013 Strategic Plan Update. The key issues outlined in this section will help to inform funding prioritization and program development for the 2012-2017 Strategic Plan Update. Figure B-1 below outlines the key issues to be considered in the Strategic Plan Update and corresponding policy recommendations.

Figure B-1 Policy Recommendations based on the Landscape Scan

Landscape Scan Component	Recommended Policy
Economy	Pursue funding for TDM in all major regional transportation projects.
	Develop business case for RTO program by articulating the benefits of RTO in terms of a "green dividend" and also through more efficient development patterns.
Energy Costs	Position the RTO program as a cost-saving program by showing how non-SOV modes save people money
Traveler Information and Tools: technology & social media	Prioritize funding programs in the grant process that provide regional traveler information tools in real time.
Human Health	Partner with healthcare providers to emphasize the relationship between health and active transportation to regional partners.
	Develop health indicators to track transportation and health performance metrics.
Growing Minority Population	Use individualized marketing model to develop culturally-specific individualized marketing programs.

The Economy

The state of the economy is a key factor in the success of Metro's RTO program both from a funding and a program implementation standpoint. The RTO program is dependent on federal Congestion Mitigation and Air Quality (CMAQ) money to fund its efforts as well as state funds for the Drive Less/Save More campaign. Local jurisdictions also depend on ODOT transportation funding to implement local transportation projects. The future of these funding streams is uncertain. Furthermore, the Metro RTO program and its regional partners depend heavily on employers to participate in and help implement employer-based travel options programs. With depleting staff and limited private investment, businesses are less likely to commit staff and funding to such efforts.

ODOT/Federal Transportation Funding Outlook

The future of transportation funding is hard to predict, but significant funding challenges are ahead that relate to transportation infrastructure and program implementation.

Per an August 2011 Federal Funding Briefing Paper published by ODOT,¹ Oregon receives over half a billion in funding from the Federal Highway Trust each year. This money comes from the federal gas and diesel tax, as well as from fees on heavy trucks. This funding pot is facing uncertainty in the years ahead. Because the federal gas and diesel tax has not been raised since 1993, and Highway Trust Fund revenues have declined since 2007 due to the economic downturn (people are driving less), revenues were significantly below expenses by \$16 billion in fiscal year 2010. The transit program is in even worse shape. These revenue imbalances will likely lead to significant cuts in highway and transit programs.

Congressman John Mica, Chairman of the House Transportation and Infrastructure Committee, has proposed a transportation authorization bill that cuts the federal budget from \$51 billion in FY 2011 to \$34 billion in FY 2012. Under this proposal, ODOT estimates that Oregon's annual highway program funding would decrease by \$150-\$175 million. Funding for transit could be reduced by 40%.

Employer Participation

Oregon and the Portland MSA have historically higher unemployment rates than the U.S. average. In 2010, the national unemployment rate was 9.7%; Oregon was 10.8% statewide; the Portland MSA was 10.6%.² The RTO program depends heavily on employers to help influence a shift in travel behavior in the region. Regional RTO partners – the TMAs, Wilsonville SMART, and TriMet in particular - depend on employers to participate in their employer outreach programs. The annual Employee Commute Options (ECO) survey is required of employers of 100+ employees; the Trimet survey is required of employers that offer the Universal Pass Program. These surveys provide critical mode split data used to report on the success and return on investment of the RTO program.

Regional partners working with employers are finding that limited staffing is making it more difficult for employers to commit to trip reduction plans and participate in the ECO or TriMet's Universal Pass Program. Businesses are more concerned with keeping their doors open. The RTO program should consider working collaboratively with other regional programs, such as Metro's employer-based recycling and composting programs and the Portland BEST Business Center, to help make the business case for the RTO program. This collaboration would allow Metro to save money on employer-based outreach and for employer-based programs to speak the same language to businesses: these programs are designed to save businesses money.

Conclusion

As employers in the region become increasingly strapped for cash and staff, the RTO program will need to position itself more than ever as a cost savings program. The stakeholder interviews – particularly the TMAs – emphasized the importance of the RTO program speaking to the bottom line: from a business perspective, how can helping employees switch to non-SOV modes save them money? Moreover, innovative funding opportunities will need to be explored to help sustain the RTO program in the limited funding environment.

¹ Oregon Department of Transportation. (2011). "Federal Funding Briefing Paper." August 29, 2011.

² Bureau of Labor Statistics. 2010. "Local Area Unemployment Statistics." and "Labor Force Statistics from the Current Population Survey."

Energy Costs

Since 2008, the average gas price in the U.S. has increased from \$3.08 per gallon to \$3.63 per gallon in September 2011. Similarly, the average price for the west coast has increased from \$3.14 to \$3.81 per gallon during the same time period.³ Although energy price forecasts are highly uncertain,⁴ the price of gas is expected to increase as global supply decreases.

Electric Vehicles

The electric vehicle (EV) industry is gaining momentum across the U.S. as communities look for innovative strategies to reduce their greenhouse gas emissions. Oregon has proven to be an early leader in the fast emerging electric vehicle industry. A new report from Pike Research reports that Oregon is slated to install 33,000 electric vehicle charging stations by 2017, ranking 14th highest in the nation.⁵

EV Efforts in Oregon

Oregon's electric vehicle plan, *Energize Oregon*, is led by the Transportation Electrification Executive Council. The plan outlines strategies to move Oregon towards the national goal of getting one million electric vehicles on the road by 2015. The plan is funded from a \$485,000 grant from the U.S. Department of Energy.

Drive Oregon has also been a leader in Oregon's electric vehicle industry. This initiative includes a coalition of companies and interest groups engaged in the electric vehicle industry and transportation electrification. Its mission is to support and ensure that the electric vehicle industry in Oregon maintains and develops its competitive advantage. Forty companies in Oregon are currently working on electric vehicle-related technologies from batteries, to motors, to charging stations to electric components.⁶ The initiative is supported by the Governor and the Oregon Legislature and is funded in part by \$1.2 million granted by the Oregon Innovation Council.

The Portland region in particular is becoming a hub for electric vehicle testing and manufacturing. Toyota recently chose Portland to test its new plug-in hybrid Prius, which is expected to be launched in 2012. The local start-up Green Lite is also creating a plug-in hybrid prototype that gets 100 miles per gallon. A Wilsonville automotive supplier company, Eaton, also plans to build fast chargers to tap in to the electric vehicle supply chain.⁷

³ U.S. Energy Information Administration. (2011). "Weekly Gasoline and Diesel Prices." Web. Assessed 19 September 2011. http://www.eia.gov/dnav/pet/pet_pri_gnd_a_epmr_pte_dpgal_w.htm

⁴ U.S. Energy Information Administration. (2011). "Short-Term Energy Outlook." September 7, 2011. Web. Assessed 19 September 2011. <http://205.254.135.24/steo/>

⁵ Sustainable Business Oregon. (2011). "Research snapshot: Where the EV charges are." 2 September 2011. Web. Assessed 19 September 2011. <http://www.sustainablebusinessoregon.com/articles/2011/09/research-snapshot-where-the-ev.html>

⁶ Drive Oregon. (2011). "Initiatives." Web. Assessed 19 September 2011. <http://driveoregon.org/about-us/initiatives/>

⁷ Belson, Ken. (2011). "Portland Plans for Transit All Powered by Electricity." The New York Times. August 26, 2011. Web. Assessed 19 September 2011. http://www.nytimes.com/2011/08/28/automobiles/portland-plans-for-transit-all-powered-by-electricity.html?_r=1

EV and Travel Options

An important conversation is emerging in the clean vehicle discussion. Although clean vehicles support standard transportation demand management (TDM) goals of reducing greenhouse gas emissions, the goals are less aligned when addressing congestion, equity, and sprawl.

Arguably, TDM strategies can reduce traffic congestion, road and parking facility costs, crashes, urban sprawl and traffic noise, while clean vehicle strategies can increase these costs by making it less expensive to drive.⁸ With gas tax revenue predicted to decline with increasing use of clean electric vehicles, states will need to find new mechanisms to fund TDM and road maintenance. Mileage fees would take the place of gasoline taxes, which will decrease as more fuel-efficient and electric cars are introduced.

To address this, the Oregon House of Representatives is considering a new usage fee that would charge electric vehicle drivers on a per mile basis. The Road User Fee Task Force was formed to assess the viability of a per-mile charge system. House Bill 2328, Vehicle Road Usage Charge, was proposed to the House in January 2011. The Bill would require a vehicle usage fee of 0.6 cents per mile driven for electric or hybrid vehicles of the 2014 model year. The Oregon Innovative Partnerships Program would be responsible for collecting the tax. As of June 30, 2011, House Bill 2328 was being reviewed by the House of Representatives.⁹

EV & Equity

Electric vehicles also bring up equity concerns. According to the U.S. Department of Energy, electric cars are, on average \$3,500 more expensive than their non-electric vehicle equivalents. However, electric vehicles are expected to drop \$1,500 in price by 2015.¹⁰

Traveler Information & Tools: Social Media & Information Technology

Social media, smartphones, and information technology provide opportunity for the RTO program to reach more people with up-to-date travel information. Over the next five years, the RTO program should capitalize on this growing trend to provide improved information that help people bike, walk, carpool, vanpool and take transit throughout the region.

A 2011 national market study reported that 35% of adults in the U.S. own a smartphone;¹¹ while another study reported that 40% of mobile phone users own a smartphone.¹² The use of smartphones is expected to continue to increase in the next five years.

⁸ Victoria Transport Policy Institute. (2011). "Energy Conservation and Emission Reduction Strategies." TDM Encyclopedia. 9 June 2011.

⁹ OregonLive. (2011). "House Bill 2328 Measure Activity." Web. Assessed 18 October 2011. <http://gov.oregonlive.com/bill/2011/HB2328/>

¹⁰ U.S. Department of Energy. (2011). "Alternative and Advanced Vehicles: Benefits of Hybrid and Plug-In Electric Vehicles." Web. Assessed 22 September 2011. http://www.afdc.energy.gov/afdc/vehicles/electric_benefits.html

¹¹ Pew Research Center. (2011). "Smartphone Adoption & Usage." Pew Internet & American Life Project. July 11, 2011.

¹² Nielsen. (2011). "40 percent of U.S. Mobile Users Own Smartphones; 40 percent are Android." September 1, 2011.

While real-time travel technology already exists (transit tracker, TriMet Trip Planner, Google Maps, 238-RIDE, Smart Phone apps, and real-time information at transit stops), people want more real-time information at their fingertips. In June 2011, RTO hired DHM Research to conduct a telephone survey and focus groups to assess the travel patterns and awareness of travel choices among residents living in the Portland-Metro region. The study concluded that users were frustrated by having to use multiple information sources to plan their trip. Focus group participants noted the need for the following: (1) smartphone applications that allow users to plan trips with real time information; (2) a Google Maps function combined with Transit Tracker; and (3) text messaging capabilities to communicate with transit agencies.

Health

The increasingly poor health conditions in the United States provide motivation for active transportation on two fronts: a dire need to improve the health of the nation; and an impetus for businesses to support and encourage active transportation as a motivation to reduce cost (health care cost and improved employee productivity, happiness, and performance).

According to the Surgeon General, two-thirds of adults and one-third of children are overweight or obese in the United States. Between 1980 and 2008, the prevalence of obesity in the U.S. has nearly doubled in adults (from 15%-34%) and has nearly tripled in children (from 5% to 17%).¹³ Obesity is a contributing cause of many other health problems, including heart disease, stroke, diabetes, and some types of cancer. The aggressive growth in obesity rates in the U.S. is adding significantly to the nation's health care costs. Obesity-related health care costs were estimated at \$147 billion per year, according to a report released by the National Center for Chronic Disease Prevention and Health Promotion in 2010.

Metro's employment outreach and collaborative marketing efforts include research on health and active transportation for employees. The current focus is to look at how businesses can improve their bottom lines by promoting active commuting and incentivizing transportation options. Metro also received a TGM Grant for Active Transportation in the summer of 2011. This project will work to improve the region's active transportation network for bicycling and walking.

Additional health and transportation efforts are happening at the State and Metro level. In July 2011, ODOT stated that it would formalize a new Active Transportation section at ODOT, however there is no evidence that this restructuring has taken place. The restructuring was intended to formalize and better integrate a statewide multimodal transportation program.¹⁴

Growing Minority Population

Latinos and Hispanics make up the fastest growing minority population in Oregon. As of 2010, the Latino/Hispanic population was at 11.7% in Oregon, compared to 16.3% in the U.S.¹⁵ Between

¹³ U.S. Surgeon General. (2011). "The Surgeon General's Vision for a Healthy and Fit Nation Fact Sheet." Web. Assessed 10 October 2011. http://www.surgeongeneral.gov/library/obesityvision/obesityvision_factsheet.html

¹⁴ OregonLive. (2011). "New 'Active Transportation' section to be created within ODOT." July 13, 2011.

¹⁵ U.S. Census. (2010). "State and County Quick Facts: Oregon." Web. Assessed 10 October 2011. <http://quickfacts.census.gov/qfd/states/41000.html>

1980 and 1990, the Hispanic population in Oregon increased by 71%; between 1990 and 2000, the population increased by a marked 144%.¹⁶

As the Latino/Hispanic population continues to grow in the Portland Metro region, the RTO program will need to develop programs that address language and cultural barriers. Culturally-specific individualized marketing programs are one way that the RTO program can address the needs of these growing populations.

Infrastructure

Major infrastructure improvements are planned for the next 5+ years that will improve the region's access to biking, pedestrian, and transit options. The projects outlined in this section provide an opportunity for the RTO program to align investments with infrastructure projects in the region.

Portland Street Car Loop

The Portland Street Car Loop project will extend the current streetcar from downtown Portland to the Lloyd District, Central Eastside and OMSI. The line will eventually cross over the new Willamette River bridge proposed as part of the Portland-Milwaukie Light Rail project.

Lake Oswego to Portland

The proposed Lake Oswego to Portland Transit Project would connect the South Waterfront neighborhood to Lake Oswego by streetcar. As of October, 2011, the project was still in the planning phase. The Locally Preferred Alternative recommendation has been submitted to project partner jurisdictions for review. The Locally Preferred Alternative was approved by the City of Portland, the City of Lake Oswego, and TriMet in 2010. However, as of October 2011, additional analysis is being done to build a wider base of consensus before a final decision is made.

Milwaukie Light Rail

TriMet's Milwaukie MAX line will connect Brooklyn, Sellwood and Milwaukie neighborhoods to downtown Portland via OMSI, the new Portland-Milwaukie Light Rail bridge that began construction in July 2011, and South Waterfront. MAX service on the new alignment is scheduled to begin in 2015. There will be approximately 22,000 households and 85,000 employees within walking distance of Portland-Milwaukie light rail stations. By 2030, the new light rail line is expected to carry up to an average of 22,765 to 25,500 weekday riders.

¹⁶ State of Oregon. (2010). "Oregon's Demographic Trends." Office of Economic Analysis, Department of Administrative Services. February 2010. Web. Assessed 10 October 2011. http://www.oregon.gov/DAS/OEA/docs/demographic/OR_pop_trend2010.pdf

Appendix C – Summary of Think Tank Proceedings

This section documents the information obtained from the Think Tank Meeting held in the Metro Council Chambers on October 6, 2011, for the 2012 – 2017 RTO Strategic Plan Update.

The purpose of the Think Tank was to bring together regional community leaders to gather their thoughts and guidance on which strategies should be used to improve travel options in the region over the next five years. The Think Tank discussion was organized around the following three presentations:

- Part 1: Project Overview & Key Issues
 - Presenter: Thomas Brennan, *Nelson\Nygaard*
- Part 2: Integrating TDM and Regional Transportation Plans
 - Presenter: Eric Schreffler, *ESTC*
- Part 3: Regional Organizational Models
 - Presenter: Peter Valk, *Transportation Management Services*

The information presented in this memorandum is organized around the three presentations listed above. Participant comments are categorized where appropriate and then synthesized at the end of each section.

MEETING PARTICIPANTS

The following participants attended the Think Tank meeting:

Organization	Name	Title
Metro	Carlotta Collette	Metro Councilor
	Ted Leybold	MTIP project manager
City of Portland	Tom Miller	Director of Transportation
Washington County	Greg Malinowski	County Commissioner
TriMet	Drew Blevins	Director of Marketing
Kaiser Permanente	Phil Wu	Pediatrician
Oregon Environmental Council	Chris Hagerbaumer	Deputy Director
Portland Planning & Sustainability	Chris Smith	Commissioner
Ride Connection	Julie Wilcke	Chief Operation Officer
Clackamas County	Jamie Damon	County Commissioner

PART 1: PROJECT OVERVIEW & KEY ISSUES

The Think Tank meeting began with Ted Leybold providing an overview of the Metro RTO program and the purpose of today's meeting. He then asked the group the following question: "what is most important to you when you make a decision about how you make your trips?" The group expressed the following key decision-making factors: reliability, ease of travel, cost, health, safety, effectiveness, practicality, social interaction, fresh air, and stress relief.

Tom Brennan from Nelson Nygaard proceeded to give an overview of the Strategic Plan Update, the RTO program, and key issues that have been identified to date from the stakeholder interviews, the landscape scan, and the preliminary evaluation. Questions asked of the group are listed below, followed by participant responses and a synthesis of what was heard.

What should be the Considerations for the Next Five Years?

The RTO Strategic Plan will include a "Landscape Scan" section that will highlight trends and policy drivers for RTO to consider for the next five year strategic plan. The Think Tank participants emphasized the follow important factors to consider in the landscape scan:

Social Media

- Consider the smartphone apps that will be needed to help the region use travel options
 - Traveler information tools will need to be a funding priority
- The balance of technical and physical information is important because not everybody has a smartphone

Social Equity

- Consider the fast growing minority population in Oregon
 - Attend to differentiation of values and culture, language barriers
 - Use symbols instead of words
 - Social equity & environmental justice
 - Use SmartTrips model to reach out to minority population: culturally-specific individualized marketing program instead of neighborhood-specific
- Health is a component of equity

Economy

- Focus on the economy – cash is tight and therefore focusing on return on investment is important

Quality of Life

- Focus on quality of local life – the food you eat, the places you visit; quality of life is huge driver for the way people think about transportation

Equal Access

- ADA compliance – ensure that all people have equal access to transportation options in the region.
- Start to plan for the aging baby boomer population.

Question #1 Synthesis

Think Tank participants discussed the importance of emerging technologies and the potential to make travel options more convenient and more widely used. However, the Strategic Plan should also focus on growing elderly and minority populations in the region and ensure that these populations are both marketed to and planned for.

Question #2: What should the Key Outcomes of the RTO Program Be?

Think Tank participants were then asked what the key outcomes should be of the RTO program in the next five years. The following outcomes were discussed:

Diverse Community Needs

- Create travel options that meet diverse community goals
 - Metro should play a coordination role
- Develop a balance of investments that are reflective of program goals
 - Define optimal level for highest ROI for each type of investment
- Outcomes could be different for different communities
 - Create messaging that shows how different communities benefit from RTO and transportation options

Health

- Focus on health – health for people, for community, for the planet
 - Develop performance metrics that tie to health
 - VMT is a correlate with health
- GHG reduction is ultimate goal, but less driving has so many other benefits

Convenience

- Convenience and choice are key outcomes
 - Travel options should provide the same level of convenience that SOVs currently have
 - Investing in travel options helps improve convenience factor
- Redundancy in travel options is a good thing = resiliency

Awareness

- Awareness needs to be a key goal of the program
- Invest in information technology that helps people make transportation choices; train users to use these resources
- Avoid talking about travel “alternatives,” because this implies that it is a lesser choice. Deliver RTO as a pallet of choices, including options for when it is ideal to drive

Cost Savings

- Cost savings should be a key message: trip training makes sense, for example

Question #2 Synthesis

Think Tank participants generally discussed health, convenience, awareness, and cost savings as crucial outcomes of the RTO program. Interesting discussion emerged around the importance of defining outcomes differently for different types of communities. Depending on the level of involvement, political support, and infrastructure, travel options programs might aim for very different outcomes.

PART II: INTEGRATING TDM & REGIONAL TRANSPORTATION PLANS

Eric Schreffler from ESTC provided a presentation on the important link between Transportation Demand Management (TDM) and regional transportation planning.

Question #3: How can the RTO program be more effective by partnering with regional agencies and planning efforts?

Program Flexibility

- Flexibility in how RTO money is spent would help address regional differences and priorities
- Avoid a one-size-fits-all approach; consider a hierarchy of programs

Systems Thinking

- Systems thinking is important
 - Will require integration of roles and multiple organizations collaborating together
- Clarify roles: define which organizations do retail level delivery and then set them up for success
- Build-in transportation options as part of SW Corridor Plan

- Add filter/feedback for RTO as part of MTIP development
- Include a TDM component into each of the planning studies; institutionalize it into the planning process
- Use variable message signs more effectively
- Raise a sense of personal responsibility for travel choices as part of designing the system

Question #3 Synthesis

Think Tank participants discussed the possibility of linking future RTO investments more closely with corridor and other transportation planning efforts. Participants generally agreed with this idea, but emphasized that the RTO program would need a heightened level of collaboration and definition of roles between organizations in the region.

PART III: REGIONAL ORGANIZATIONAL MODELS

Peter Valk presented three regional organizational models as they relate to program development, program delivery, and program evaluation: the centralized model, the partnership model, and the decentralized model.

Question #4: What role should Metro RTO play in program development, delivery, and evaluation of programs?

Participant Responses

- Is the region ready for true regionalism within the RTO program? Consider the recent discussion surrounding bridges. The question of what role Metro should play in the RTO program is related to a bigger question about the role metro should play in the region.
- Metro should be higher level thinker and developer and then work with local partners on delivery
- Who delivers programs on the ground should be based on who has the capacity and interest to do so
- Prioritization and expectations should be proportionate
- Prioritization can be determined by level of interest and capability

Question#4 Synthesis

Think Tank participants discussed the role that Metro should play in delivering RTO services in the region. Participants expressed the need for Metro to play a high level program development role. Moreover, the Metro RTO program should provide services that help local partners succeed. However, it would be important for Metro to confirm that local partners had the capacity and interest to implement those services at a local level.

Appendix D Evaluation Report

The Metro Regional Travel Options (RTO) program works to improve travel options in the region with the goal of decreasing the reliance on single occupancy vehicles as the primary mode of travel, therefore decreasing the number of vehicle miles traveled (VMT). The RTO program is the region's Transportation Demand Management strategy and is central to the region's efforts to comply with federal air quality and congestion management requirements. RTO supports the goals outlined in the 2040 Growth Concept Regional Transportation Plan to reduce reliance on the automobile by focusing growth in centers and along major transportation corridors.

The program brings a wide-range of benefits to the region, including decreased green house gas emissions, improved health by promoting active transportation such as biking and walking, and improved livability by creating travel options that move people and goods efficiently, safely, and affordably.

In partnership with regional jurisdictions, non-profits, and public private partnerships, the RTO program achieves its mission through the following programs: (1) collaborative marketing, (2) commuter services, (3) traveler information tools, (4) transportation management associations, and (5) the travel options grant program. The RTO program is also responsible for measuring and evaluating its programs and providing policy and funding that supports TDM policies in the region.

The RTO program is guided by a five-year strategic plan. The last strategic plan was written in 2008 and covers the 2008-2013 period. The following goals were identified in the 2008-2013 Strategic Plan:

- **Goal 1** Continue a regional collaborative marketing campaign to increase awareness and use of travel options and reduce drive-alone car trips.
- **Goal 2** Support employers and commuters to increase the use of travel options for commute trips.
- **Goal 3** Provide information and services to support increased use of travel options for all trips.
- **Goal 4** Promote and provide services that support increased use of travel options in local downtowns and centers.
- **Goal 5** Report progress to aid decision-making and encourage innovation.
- **Goal 6** Follow a collaborative decision-making structure that provides program oversight and advances the goals and objectives of the Regional Transportation Plan (RTP).

Based on past performance and expected revenues, the 2008-2013 strategic plan estimated that the RTO program would reduce approximately 86,600,000 vehicle miles of travel (VMT) per year.

To measure the success of the RTO program and assess if the 86 million VMT reduction was met, a biennial evaluation was conducted. This evaluation covers the period of January 2009 – June

2011.¹ The evaluation was completed in conjunction with the 2012-2017 Strategic Plan Update; lessons learned were used to inform recommendations in the Strategic Plan.

KEY ACCOMPLISHMENTS

In the 2009-2010 evaluation period, the Metro RTO program invested nearly \$5.8 million in improving travel options around the region. Funding was dispersed to a wide range of geographies and programs in the region, from the City of Portland, to Washington County, to the City of Gresham.

The 2009-2010 evaluation period yielded many important accomplishments:

- The non-SOV mode split for employers working with the TriMet Employer Outreach program increased from 34.6% in 2008 to 38.5% in 2011.
- In its fifth year, the Drive Less/Save More campaign helped 222,000 people to reduce their car trips; an estimated 21.8 million vehicle miles reduced (VMR).²
- 51% of adults in the region recalled seeing, reading, or hearing a message about reducing car trips.
- The TMAs worked with over 120 employment sites with close to 40,000 employees.
- Transportation programs were in place at over 1,400 worksites, up 27% from the last evaluation period.
- In 2011, the Metro RTO program conducted its first regional awareness survey based on a recommendation in the 2007-2008 evaluation. The awareness survey will be conducted on a biennial basis.
- The 2011 RTO awareness survey and focus groups reported the following:
 - 59% of residents have heard of TriMet Trip Planner, and 43% have used it
 - 34% of residents are aware of the Drive Less/Save More campaign
- Over 50,000 Bike There! maps sold or distributed for free since 2007; 54,000 Walk There! guidebooks sold or distributed for free since 2008
- As of June 30, 2011, over 12,000 people were registered in the CarpoolMatchNW database. This indicates a 50% increase in carpool registrants since the 2008-2009 evaluation.
- Between January 2009 and June 2011, Metro coordinated, on average, 19 vanpools and 147 riders per month. During the evaluation period, the regional vanpool program saved a total of 3.8 million VMT at an average cost of \$.08 per VMR.
- Metro RTO funded its first two suburban Individualized Marketing campaigns.³

Comment [b1]: Caleb, would you prefer if we took this number out?

¹ This evaluation will be referred to as the 2009-2010 evaluation from this point forward.

² VMR is based on the assumption that of people who reported "taking action" based on the DLMS campaign, assuming that people may have replaced one drive-alone trip per year.

³ However, data is not yet available for these programs: Discover Wilsonville and Gresham Civic Drive individualized marketing campaigns.

PROGRAMS EVALUATED

During the evaluation period, the Metro RTO program funded and managed 33 programs across the region. A portion of Metro RTO funding was also used to manage and evaluate the RTO program, including grant administration, RTO Subcommittee management, and TMA management.

Figure 1 below outlines the programs evaluated with the corresponding budget allocation.

Figure 1 RTO 2009-2010 Budget

Program Type	Program Name	2010-2011 Budget
RTO Core Program ⁴	Bike There! Map	\$51,876
	CarpoolMatchNW	\$80,000
	Drive Less/ Save More	\$944,108
	Metro Employer Outreach	\$368,715
	Regional Vanpool	\$342,428
	RTO Evaluation & Measurement	\$318,668
	RTO Staff & Grant Administration	\$420,475
	RTO Subcommittee Management	\$53,212
	Regional Collaborative Marketing	\$364,440
	TMA Administration	\$68,077
	TriMet Employer Outreach	\$781,997
	Walk There! Guidebook	\$90,000
	Wilsonville SMART	\$126,499
TMAs	Clackamas Regional Center TMA	\$103,318
	Gresham Regional Center TMA	\$103,318
	Lloyd TMA	\$78,318
	South Waterfront TMA	\$75,000
	South Waterfront TMA Feasibility Study	\$33,081
	Swan Island TMA	\$103,318
	Westside Transportation Alliance	\$103,318
Travel Options Grants	BTA Bike Commute Challenge	\$25,000
	City of Gresham Bike/Ped Wayfinding	\$50,000

⁴ RTO Core Programs are programs either managed by Metro RTO staff or by its regional partners. Programs listed in this category are funded outside of the competitive RTO grant process.

Program Type	Program Name	2010-2011 Budget
	Community Cycling Center Barriers to Biking	\$78,625
	Gresham TMA Helmet Bike Rack	\$11,000
	Lloyd TMA Lloyd Links	\$41,445
	PBOT Sunday Parkways	\$60,000
	PSU Bike Parking	\$50,000
	Swan Island TMA Trip Not Taken	\$28,000
	Tigard Bike Map	\$20,000
	TriMet Bike Lockers	\$50,000
	TriMet Trip Planner	\$88,930
	Wilsonville Bike/Ped Coordinator	\$80,000
	WTA Bike Rack Program	\$15,000
	WTA Carefree Commuter Challenge	\$38,000
Individualized Marketing	City of Gresham Civic Drive	\$100,000
	City of Portland Greenline	\$300,000
	City of Portland SmartTrips NNE	\$200,000
	City of Portland SmartTrips NNW	\$171,520
	Wilsonville DiscoverWilsonville	\$222,480
Total RTO Funding 2009-2010		\$6,240,166

Comment [b2]: Need to reconcile; budget that RTO staff sent totals \$5,759,668

Source: Budget information provided by Metro RTO staff

EVALUATION METHODOLOGY

The current evaluation is being conducted alongside the 2012-2017 Strategic Plan Update. As such, the approach to the evaluation has changed from previous evaluations. In years past, RTO evaluations have used a structured framework in which all RTO programs were evaluated strictly on their outputs and outcomes. In discussions with Dr. Jennifer Dill who conducted the two previous evaluations, the following challenges were identified with the structured approach:

- Data needed to evaluate outcome-based performance indicators was often incomplete, incomparable and inconsistent;
- Acquiring needed data often required far more contact and follow-up than anticipated; and
- It was often difficult to separate out the unique outcomes of various projects and programs given the overlap between regional and localized programs.

The evaluation outlined in this report assesses the RTO program in a more streamlined manner. The intention is not only to evaluate the effectiveness of each RTO program, but to evaluate the evaluation process itself. The result is an overview of the accomplishments and challenges of each program, and a detailed assessment of how evaluation can be structured in the future. This

allowed for a higher level assessment of the overall evaluation framework employed by Metro and an analysis of how the framework might be improved or modified to better meet the strategic direction set forth in the other elements of this project. Lessons learned from this evaluation will be used to inform prioritization of funding and evaluation requirements in the 2012-2017 Strategic Plan Update.

Thirty-three RTO programs were evaluated using the following steps:

1. At a basic level, the first step assessed if each RTO program met its contracted requirements. Each program was listed in a matrix (see Figure 2 below) that included the program investment amount, and an assessment of whether or not contracted goals were met. Based on the stakeholder interview process, annual reports, and other data provided by Metro, each programs' accomplishments were then assessed against the goals outlined in the contract.
2. Three programs were evaluated in detail. These programs were selected based on the quality of data available and the level of investment. With input from Metro RTO staff, data quality for each program was rated. Programs with a combination of high investment and high quality data were considered for detailed evaluation.
3. Based on the level of investment and quality of data, three programs were thoroughly analyzed to show return on investment (ROI) by comparing Metro's investment to the program's reduction in vehicle miles traveled (VMT). These programs include: (1) the TriMet Employer Outreach program; (2) TMAs; and (3) Individualized Marketing programs.
4. Lessons learned from the evaluation process, including reporting, contracting, and evaluation requirements, were synthesized and recommendations were made to inform recommendations in the Strategic Plan Update.

EVALUATION SUMMARY

As described above, this evaluation provides a top level assessment of all RTO funded programs from January 2009 – June 2011. At a basic level, the evaluation looks at whether the program achieved the goals outlined in the contract. Three priority programs with both high investment and high quality data were then analyzed in further detail to calculate an estimated VMR and Metro's return on investment.

Evaluation Matrix

Figure 2 provides a high level evaluation of the Metro RTO programs funded during the 2009-2010 period. Programs with a "green" dot have achieved their program outcomes and outputs as outlined in their contract; those with a "yellow" dot, in most cases, have achieved their program outputs but have failed to report on mode split or VMR data as outlined in the contract; those with a "red" dot did not achieve their program outputs or outcomes as outlined in their contract. Projects with a "TBD" have not been completed yet and therefore we were unable to determine if contract goals were met.

Figure 2 Evaluation Matrix of Metro RTO Funded Programs, 2010-2011

Organization	2009-2010 RTO Investment	Percent	Did Program Meet Contract Goals?	Investment Period VMR (Low Estimate) ¹	Investment Period VMR (High Estimate) ¹	Cost per VMR (Metro Investment)
<i>RTO Core Program</i>	<i>\$2,201,999</i>	<i>35.29%</i>				
Metro Collaborative Marketing - Bike There! map	\$51,876	0.83%	n/a	n/a	n/a	n/a
Metro Collaborative Marketing - Walk There! guidebook	\$90,000	1.44%	n/a	n/a	n/a	n/a
Metro Collaborative Marketing - DLSP Sponsorships	\$44,108	0.71%	n/a	n/a	n/a	n/a
Metro Collaborative Marketing - Staff Time	\$253,312	4.06%	n/a	n/a	n/a	n/a
Metro Collaborative Marketing - M&S	\$111,128	1.78%	n/a	n/a	n/a	n/a
Metro Program Mngmt - Evaluation & Measurement	\$318,668	5.11%	n/a	n/a	n/a	n/a
Metro Program Mngmt - RTO Subcommittee Mngmt	\$53,212	0.85%	n/a	n/a	n/a	n/a
Metro Program Mngmt - RTO Staff Time & Materials	\$263,901	4.23%	n/a	n/a	n/a	n/a
Metro Program Mngmt RTO Grant Administration	\$156,574	2.51%	n/a	n/a	n/a	n/a
Metro Program Mngmt - TMA Administration	\$68,077	1.09%	n/a	n/a	n/a	n/a
Metro Rideshare - CarpoolMatchNW.org	\$80,000	1.28%	n/a	n/a	n/a	n/a
Metro - Employer Outreach	\$368,715	5.91%	n/a	16,304,383	24,456,575	n/a
Metro - VanPool (Operations & Staff Time)	\$342,428	5.49%	n/a	3,804,307	3,804,307	\$0.09
<i>Partner Outreach - Transit Agencies</i>	<i>\$908,496</i>	<i>14.56%</i>				
TriMet Employer Program	\$781,997	12.53%	●	42,982,007	64,473,011	\$0.01-\$0.02
Wilsonville SMART Program	\$126,499	2.03%	●	863,918	1,295,877	\$0.10-\$0.15

Organization	2009-2010 RTO Investment	Percent	Did Program Meet Contract Goals?	Investment Period VMR (Low Estimate) ¹	Investment Period VMR (High Estimate) ¹	Cost per VMR (Metro Investment)
Partner Employer Outreach - TMA Program	\$599,671	9.61%				
Clackamas Regional Center TMA	\$103,318	1.66%	●	n/a	n/a	n/a
Gresham Regional Center TMA	\$103,318	1.66%	●	751,027	1,126,541	\$0.09-\$0.14
Lloyd TMA	\$78,318	1.26%	●	3,844,269	5,766,404	\$0.01-\$0.02
Swan Island TMA	\$103,318	1.66%	●	n/a	n/a	n/a
South Waterfront TMA	\$75,000	1.20%	●	n/a	n/a	n/a
South Waterfront Feasibility Study	\$33,081	0.53%	●	n/a	n/a	n/a
Westside Transportation Alliance (WTA)	\$103,318	1.66%	●	5,350,193	8,025,290	\$0.01-\$0.02
Travel Options Grants	\$636,000	10.19%				
BTA Bike Commute Challenge	\$25,000	0.40%	●	847,265	847,265	\$0.03
City of Gresham Bike/Ped Wayfinding	\$50,000	0.80%	●	n/a	n/a	n/a
City of Tigard Bike Map	\$20,000	0.32%	TBD	n/a	n/a	n/a
Community Cycling Center Barriers to Biking	\$78,625	1.26%	●	n/a	n/a	n/a
Gresham Bicycle Safety & Bicycle Rack Project	\$11,000	0.18%	●	n/a	n/a	n/a
Lloyd TMA Lloyd Links	\$41,445	0.66%	●	n/a	n/a	n/a
PBOT Sunday Parkways	\$60,000	0.96%	●	n/a	n/a	n/a

Organization	2009-2010 RTO Investment	Percent	Did Program Meet Contract Goals?	Investment Period VMR (Low Estimate) ¹	Investment Period VMR (High Estimate) ¹	Cost per VMR (Metro Investment)
PSU Bike Parking	\$50,000	0.80%	●	n/a	n/a	n/a
Swan Island TMA Trip Not Taken	\$28,000	0.45%	●	n/a	n/a	n/a
TriMet Bike Lockers at Beaverton Transit Center	\$50,000	0.80%	●	n/a	n/a	n/a
TriMet Trip Planner	\$88,930	1.43%	●	n/a	n/a	n/a
Wilsonville Bike/Ped Coordinator	\$80,000	1.28%	●	n/a	n/a	n/a
WTA Bike Rack Program	\$15,000	0.24%	●	n/a	n/a	n/a
WTA Carefree Commuter Challenge	\$38,000	0.61%	●	n/a	n/a	n/a
Individualized Marketing	\$994,000	15.93%				
City of Gresham Civic Drive	\$100,000	1.60%	TBD	TBD	TBD	n/a
City of Portland Greenline	\$300,000	4.81%	●	19,200,000	28,800,000	\$0.01-\$0.02
City of Portland SmartTrips NNW	\$200,000	3.21%	●	4,400,000	6,600,000	\$0.03-\$0.05
City of Portland SmartTrips NNE	\$171,520	2.75%	TBD	TBD	TBD	
Wilsonville DiscoverWilsonville	\$222,480	3.57%	TBD	TBD	TBD	
TOTAL²	\$6,240,166	100%		98,347,369	145,195,268	

¹A low and high VMR estimate is provided because change in mode split cannot be 100% attributed to RTO efforts. Therefore, the low estimate assumes that RTO efforts were responsible for 40% of VMR; the high estimate assumes 60%.

² Total budget is currently being confirmed by Metro RTO staff.

It is important to note that the Metro RTO investment outlined in the far right column above is only a portion of the dollars invested in each program. All Metro RTO grants require a percent local match. Travel Options and Individualized Marketing grants require a 10.27% local match. Per Metro Resolution No. 02-3183, TMA funding is phased over three years with the idea that TMAs will become more financially stable and invested in the community over time: year 1 requires 19% local match; year 2 requires 25% local match; year 3 requires 31% local match.

Detailed Evaluation for High-Investment Programs

Vehicle Miles Reduced (VMR) is a key performance measure for the RTO program. Estimated VMR, however, is only available for some programs. This section outlines three high investment programs with quality VMR data: the TriMet Employer Outreach program, the TMAs, and two of the five individualized marketing programs (post-marketing survey data is not yet available for Gresham Civic Drive, Discover Wilsonville, and City of Portland SmartTrips NNE). The VMR and return on investment for all programs shows a “high” and a “low” estimate, assuming that only between 40% and 60% of VMR reduced can be attributed to RTO program investment. Presumably, change in gas prices, the economy, increased awareness of climate change, and other factors, also contribute to mode shift.

Figure 3 below outlines the Metro investment for these programs, estimated VMR, and estimated return on investment (cost per VMR).

Figure 3 Conservative Estimate of Overall Annual Reduction in Vehicle Miles Traveled for High Investment Programs

Program Name	% of Metro RTO Budget	Metro Investment	Investment Period VMR (Low Estimate)	Investment Period VMR (High Estimate)	Cost per VMR
TriMet Employer Outreach	15%	\$781,997	42,982,007	64,473,011	\$0.01-\$0.02
Clackamas Regional Center TMA	10%	\$103,318	n/a	n/a	n/a
Gresham Regional Center TMA		\$103,318	751,027	1,126,541	\$0.09-\$0.14
Lloyd TMA		\$78,318	3,844,269	5,766,404	\$0.01-\$0.02
South Waterfront		\$75,000	n/a	n/a	n/a
Swan Island TMA		\$103,318	Increased VMT 32,039	n/a	n/a
City of Gresham Civic Drive	16%	\$100,000	n/a	n/a	n/a
City of Portland Greenline		\$300,000	19,200,000	28,800,000	\$0.01-\$0.02
City of Portland SmartTrips NNW		\$200,000	4,400,000	6,600,000	\$0.03-\$0.05

Metro RTO Biennial Evaluation, January 2009 to June-2011
Metro Regional Travel Options Program

Program Name	% of Metro RTO Budget	Metro Investment	Investment Period VMR (Low Estimate)	Investment Period VMR (High Estimate)	Cost per VMR
City of Portland SmartTrips NNE		\$171,520	n/a	n/a	n/a
Wilsonville DiscoverWilsonville		\$222,480	n/a	n/a	n/a

Source: Budget numbers provided by Metro RTO staff; VMR calculations are taken from ECO survey data provided by Metro RTO staff.

The TriMet Employer Outreach program accounts for 15% of the Metro RTO program. These funds are granted on a formula basis, meaning they are granted outside of the competitive grant process. The TriMet Employer Outreach program is a cost effective program, yielding between 17 and 26 million VMR annually with a very low cost of \$0.01-\$0.02 per VMR.

The TMA performance, on the other hand, is variable. At one end of the spectrum, Lloyd TMA and the WTA are high performing programs at a similar low cost per VMR (\$0.01-\$0.02 per VMR). However, the Clackamas Regional Center TMA was closed in 2011 because it could not meet its mode split targets; the Gresham TMA achieved only 300,411-450,616 VMR annually at a cost between \$0.09-\$0.14 per VMR; employees surveyed as part of the Swan Island TMA actually increased in VMT.⁵

Comment [b3]: Caleb, the Lloyd numbers in the table above are based on the ECO spreadsheet from Caleb. VMR listed in Lloyd's annual report are over 1 million VMR higher. Should we stay with the numbers listed here for consistency's sake? Or adjust?

Individualized marketing programs have proven to be a cost-effective program over the last two evaluations. Although complete analysis is not yet done for three of the five individualized marketing programs funded in this evaluation period, the City of Portland Greenline and NNW projects yielded substantial VMR for a low cost of between \$0.01-\$0.05 per VMR.

TriMet Employer Outreach

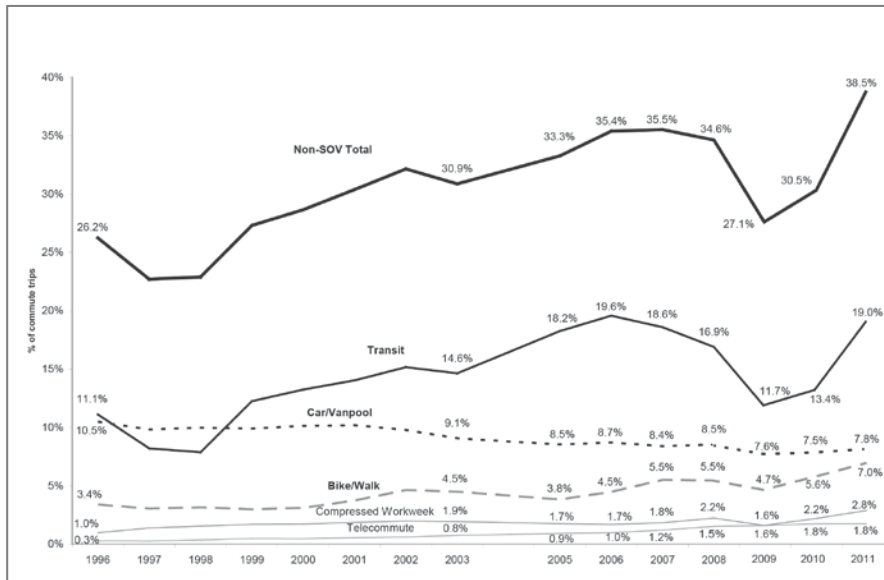
The TriMet Employer Outreach program has worked with over 1,400 employers as of June 2011. Of these, 728 employers with over 150,000 employees completed an ECO survey. Services provided to employers include: (1) assistance with filling out the state ECO survey; (2) trip reduction plans; (3) transportation options kits for new employees; (4) emergency ride home program; (5) vanpool coordination assistance; and (6) the TriMet Employee Pass program that provides transit passes to employers tax free.

Figure 4 below shows the non-SOV mode split for worksites participating in the TriMet Employer Outreach Program between 1996 and 2011. During this evaluation period (January 2009-June 2011), the non-SOV mode split increased considerably from 27.1% in 2009 to 38.5% in 2011. Transit has accounted for a large portion of the non-SOV mode split increase (11.7% to 19.0%).

⁵ The Swan Island increase in VMT could be attributed to the following factors: (1) Select weekday trips for the 85 bus line to Swan Island were cut due to low ridership in May 2010; (2) Of the 12 worksites surveyed, 5 sites increased their drive alone rate, and one site continued to have 100% drive alone rate since the base line year. Further investigation as to why these 5 sites increased their drive alone rates is needed.

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Figure 4 1996-2011 Non-SOV Commute Trips at worksites participating in TriMet Employer Outreach Program



Source: 1996-2008 figures are from TriMet and were included previous RTO Evaluation Reports; 2009-2011 figures calculated using original employer survey data from TriMet.

By comparison, non-SOV mode-split on the national scale changed very little between 2006 and 2010. The analysis in Figure 5 below uses the 2006-2008 and 2010 American Community Surveys to calculate the change in mode split nationally and in the Portland MSA between 2006 and 2010. While the RTO analysis in Figure 4 above notes a 4.9% decrease in non-SOV mode split for worksites participating in the TriMet Employer Outreach program between 2006 and 2010, the American Community Survey shows that the Portland MSA mode-split did not change during the same period. Nationally, the non-SOV mode split decreased by 1%.

Figure 5 U.S. and Portland MSA Mode Split, 2006-2010

U.S.	2006-2008 Estimate	2010 Estimate	% Change	Portland MSA	2006-2008 Estimate	2010 Estimate	% Change
Non SOV	24.00%	23.00%	-1.00%	Non SOV	28.00%	28.00%	0.00%
Public Transit	4.90%	4.90%	0.00%	Public Transit	6.10%	6.00%	-0.10%
Carpool	11.00%	10.00%	-1.00%	Carpool	11.00%	9.00%	-2.00%
Bike	0.50%	0.50%	0.00%	Bike	3.10%	3.00%	-0.10%
Walk	2.80%	2.30%	-0.50%	Walk	2.70%	3.00%	0.30%

Source: 2006-2008 American Community Survey 3-year estimate; 2010 American Community Survey 1-year estimate

Transportation Management Associations

Transportation Management Associations (TMAs) are non-profit and often member-supported organizations that provide transportation services to a particular geographic area. The TMAs in the Metro region provide an array of transportation services to businesses, including ECO survey assistance, individualized trip reduction planning, and advocacy work for improved transit service. TMAs are funded in part from Metro RTO's TMA grant program. As of June 2011, the Metro RTO program funded five TMAs, including the Lloyd TMA, Westside Transportation Alliance, Gresham Downtown Regional TMA, Swan Island TMA, and the recently formed South Waterfront TMA. Total TMA funding accounted for just under 10% of total Metro RTO funding.

As of June 2011, Metro-funded TMAs worked with a combined 127 worksites in the region with more than 35,000 employees.⁶ Each TMA faced its own set of challenges depending on its geographic location, local funding support, and level of staff expertise. These challenges can generally be categorized as follows: (1) lack of bike and transit infrastructure; (2) limited private sector support due to the economic downturn; (3) difficulty demonstrating value to the private sector due to overlap of services provided by Metro, SMART, and TriMet; and (4) availability of free parking.

TMAs are expected to maintain 1 million VMR (minimum for performance-based funds) and reduce another 500,000 VMR over the course of the year for booster funds. Figure 6 below compares the staff, local funding support, and number of employers and employees worked with compared to Metro's investment and estimated VMR. Number of worksites and ECO-eligible employees is taken from the bi-annual ECO survey; VMR is estimated by comparing each company's mode split from their baseline survey to the mode split reported in their most recent survey. In some cases, baseline surveys were taken as far back as the late 1990s when the ECO rule was instituted in Oregon.

Figure 6 TMA Detailed Evaluation, 2009-2010

TMA	# of Staff (FTE) ¹	Local Funding Support ²	# of Surveyed Worksites	# of Worksites also in Contact w/ TriMet	# of ECO-Eligible Employees	Metro Investment	Annual VMR (Low)	Annual VMR (High)	Cost per VMR ³
Gresham	2	N/A	7	7	1,537	\$103,318	300,411	450,616	\$0.09 - \$0.14
Lloyd	5	High	68	8	12,017	\$78,318	1,537,708	2,306,561	\$0.01 - \$0.02

⁶ South Waterfront TMA did not have an identified employer list at the time of the evaluation. Number of worksites and employers is calculated from the ECO Survey Data.

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TMA	# of Staff (FTE) ¹	Local Funding Support ²	# of Surveyed Worksites	# of Worksites also in Contact w/ TriMet	# of ECO-Eligible Employees	Metro Investment	Annual VMR (Low)	Annual VMR (High)	Cost per VMR ³
South Waterfront	2	Medium	n/a	n/a	n/a	\$33,081	n/a	n/a	n/a
Swan Island	1.5	Low	12	8	2,334	\$103,318	VMT Increased	VMT Increased	n/a

¹ The total number of FTE at each site do not necessarily work on RTO-related strategies. Lloyd works on other parking-related consulting; South Waterfront staff contribute to time spent on community relations; Gresham staff help run the Downtown Development Association. However, the total FTE does offer additional organizational capacity that is worth noting.

² High = Metro RTO funds account for 0% - 25% of operating budget
 Medium = Metro RTO funds account for 26% - 49% of operating budget
 Low = Metro RTO funds account for 50% - 100% of operating budget

³ Cost per VMR is based on the Metro RTO investment only; it does not take into account other local funding streams

Figure 6 above emphasizes the importance of ample staff and local funding support to sustain a successful TMA. Those TMAs with multiple staff members and medium-high local support show a higher level of VMR. Moreover, those TMAs, particularly Lloyd and the WTA, are the only two TMAs who achieved the annual 1.5 million VMR goal as outlined in their contract.

Figure 6 also highlights the duplicative efforts of TMAs and TriMet. For example, 100% of employers working with the Gresham TMA were also in contact with TriMet. Those TMAs with the highest percentage of overlap with TriMet were also the most expensive per VMR (Gresham and Swan Island). Overlapping roles and the variable performance of TMAs are addressed in the 2012-2017 strategic plan update.

Individualized Marketing

Individualized marketing (IM) has proven to be a success in the Metro region since 2002 when the City of Portland launched the Multnomah/Hillsdale pilot project. Since then, Metro has supported a number of individualized marketing programs around the region due to their proven success and cost effectiveness. IM projects identify people within a specific geographic area, oftentimes who are in proximity to new light rail service, who have a desire to change the way they travel. The projects use personal, individualized marketing material to motivate change in travel behavior. IM projects first survey the population in the study area, then distribute individualized marketing materials to those who have expressed interest, and then do a follow-up survey to document if and how the information and one-on-one contact resulted in a change in travel behavior.

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In the 2009-2010 evaluation period, Metro funded five IM programs, accounting for over 16% of the total Metro RTO budget: (1) Gresham Civic Drive; (2) Portland SmartTrips Greenline; (3) Portland SmartTrips NNW; (4) Portland NNE; and (5) Discover Wilsonville.

Figure 7 below provides an overview of Metro’s IM investment, an estimated number of households and residents reached, vehicle miles reduced as a result of the effort, and cost per VMR. At the time of this evaluation, Gresham Civic Drive, Portland SmartTrips NNE, and Discover Wilsonville had not completed their “after” surveys and therefore no VMR or cost per VMR analysis is available.

Figure 7 Individualized Marketing Return on Investment, 2009-2010

Program	Metro Investment	Households	Residents ¹	VMR (Low)	VMR (High)	Cost per VMR
Gresham Civic Drive	\$100,000	3,000	7,470	TBD	TBD	TBD
Portland SmartTrips Greenline	\$300,000	27,684	68,933	19,200,000	28,800,000	\$0.01-\$0.02
Portland SmartTrips NNW	\$200,000	31,000	77,1790	4,400,000	6,600,000	\$0.03-\$0.05
Portland SmartTrips NNE	171,520	23,000	57,270	TBD	TBD	TBD
Discover Wilsonville	\$22,480	6,500	16,185	TBD	TBD	TBD
Total	\$994,000	94,184	227,048	23,600,000	35,400,000	

¹Note: Number of residents estimated using the Census “persons per household, 2005-2009” estimate for Oregon

During the evaluation period, individualized marketing programs reached over 90,000 households, 227,000 residents and accounted for between 23 and 35 million VMR. These programs are very cost effective, at between \$0.01 and \$0.05 per VMR.

PROGRAM EVALUATION

This section provides a description and assessment of each program funded by the RTO program between January 2009 and June 2011. The assessment is based on the requirements outlined in the Metro contract compared to the accomplishments listed in the grant recipients’ annual reports, quarterly invoices, and progress reports. This section concludes with an overview of lessons learned from the program evaluation process.

RTO Core Programs

RTO Core Programs are programs either managed by Metro RTO staff or by its regional partners. Programs listed in this section are funded outside of the competitive RTO grant process. It should be noted that the program goals for Metro-led programs are not articulated with the same level of detail as other grant-funded programs in the following section.

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Bike There!

Metro's RTO program produces the regional Bike There! map. The map includes bike routes and other resources to help people bike around the region. The Bike There! map is distributed through other regional programs, such as the Bike Commute Challenge, Drive Less. Save More, Sunday Parkways, and area TMAs. In 2010, Metro printed 25,000 Bike There! maps for retail and 5,000 free maps. Bike There! accomplished the following:

- Bike There! map updated in 2010
- 2 brown bag lunches at Metro to promote new maps; 3 additional Bike There! events
- Distributed Bike There! maps to TMA participants
- Bike There! Map was distributed through other regional programs, such as Bike Commute Challenge, DLSP, Sunday Parkways, and area TMAs.
- Bike There! map is available for download off website
- Bike There! map translated into Spanish for event outreach
- Over 50,000 Bike There! maps sold or distributed for free since 2007

Walk There! Guide

Metro's RTO program produces the regional Walk There! guidebook. The popular guidebook was revised in 2009. Kaiser Permanente continued to support the program by contributing \$13,000 to support walking events and distribute the Walk There! guidebooks for free. In 2009, the guidebook received the Special Achievement Award from the Oregon Chapter of the American Planning Association.

The Walk There! Guide program accomplished the following:

- 25 community walking events, including 770 participants Program Evaluation 2010-2011
- Event participants were surveyed: 66% of participants reported finding a walking and biking trail previously unknown to them; 40% say they walk more after the Walk There! event
- 54,000 Walk There! guidebooks were sold or distributed for free since 2008

Drive Less. Save More.

In 2005, the Oregon Legislature called for a public awareness campaign to increase awareness of travel options in the region. Drive Less. Save More. (DLSP) is a social marketing campaign adopted by the Oregon Legislature to help change personal travel behavior in the state of Oregon. The program includes a mix of advertising, earned media, public outreach, and social networking to raise public awareness and prompt people to reduce SOV trips.

Drive Less. Save More. has leveraged the Oregon Legislature's investment with the following to date:

- Generated print and broadcast news stories valued at more than \$1.8 million
- Donated print, television and radio advertising valued at more than \$1.7 million
- Private and public sector contributions totaled more than \$650,000

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- Nearly 19% of the Portland population has reduced their car trips as a result of the Drive Less/Save More Campaign– more than 222,000 individuals
- Campaign impact is a conservative reduction of 21.8 million vehicle road miles
- Reduced road miles translates into a reduction of about 10,700 tons of carbon dioxide
- DLSM has provided one-on-one consultations to nearly 25,000 households |

Comment [b4]: Caleb, do we want to include these stats?

Regional Vanpool Program

Metro's Regional Vanpool program coordinates vanpool services for commuters who travel into or within the Portland, Oregon metropolitan region and Southwest Washington for work or school.

Program Evaluation

In January 2009, Metro coordinated 27 vanpools. This included 14 vanpools that originated in SW Washington for south-bound commutes into Portland (these vanpools were subsidized from a grant from C-TRAN). In May 2009, the 14 SW Washington vanpools were taken over by C-TRAN, leaving Metro with 14 vanpools. Since May 2009, Metro has steadily added to its vanpool program. As of June 2011, Metro coordinated 19 vanpools with a total of 151 riders. Between January 2009 and June 2011, Metro has coordinated, on average, 19 vanpools and 147 riders per month. In total, the regional vanpool program has saved a total of 3.8 million VMT at an average cost of \$.08 per VMR.

A 2010 survey reported that 99% of vanpool riders were satisfied with the quality of the vanpool program; 94% were satisfied with the cost of the vanpool; and 100% were satisfied with the organization of the vanpool. One limitation of vanpool programs in the Metro region is the lack of high occupancy vehicle (HOV) lanes. However, the 2010 survey reports that the largest group of riders (34%) chose to join a vanpool to save money on gas, while only 6% reported joining to save time.

CarpoolMatch NW

CarpoolMatch NW is an online tool that connects carpool drivers with carpool riders. The program enables registered users to enter in information regarding their commute trip needs; users are then matched up with riders and/or drivers with similar needs. RTO staff administer the regional rideshare program by assisting callers with inquiries and updating the database. In June 2011, CarpoolMatchNW.org transitioned to RideshareOnline powered by DriveLessSaveMore.com. As of June 2011, the online ridesharing system had approximately 12,000 members.

RTO Employer Outreach

The RTO Employer Outreach program generally works with employers at the request of TriMet or the TMAs. Employers that work directly with Metro are often outside of good transit service areas and require vanpool or carpool services.

Key accomplishments during the evaluation period include:

- Development of shared contact management database.
- Updated DriveLessSaveMore.com to include information related to employer programs.

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- Between January 2009 and June 2011, Metro RTO staff worked with 67 surveyed employers with close to 35,000 employees to develop active commute, rideshare, and transit programs. These employers show an average non-SOV mode split of 36%, up 12% from the average baseline survey.

TriMet Employer Outreach Program

TriMet has been working with employers since the 1980s to increase the number of commute trips made by transit. The program was started in 1996 when the State adopted its Employee Commute Options (ECO) rules which require employers with 100+ employees to provide commute options for employees. The program requires employers to survey its employees every two years. TriMet targets employers affected by the ECO rules, but also works with smaller interested employers. The TriMet employer outreach program includes the following components:

- **Emergency Ride Home (ERH):** ERH provides free cab rides to employees taking alternative transportation in the event of an emergency. These rides are offered to employers subsidizing any commute mode by at least \$10 per employee per month.
- **New Employee Kits:** New employee kits are provided to employers who make transit passes available at the worksite. These kits contain information on all transportation options and are branded with the regional campaign message, DriveLess. SaveMore.
- **ECO Surveys:** Employee Commute Option surveys are processed for any employer free of charge. TriMet reviews the results of the surveys with the employer to help them understand the data.
- **Direct Outreach:** TriMet reaches out to employers in the area to develop and maintain a multi-modal transportation program. Topics covered include ECO plans and surveys, transit, carpooling, vanpooling, biking, walking, telecommuting, compressed workweek and flextime. TriMet provides transit-specific information to those requesting it or to those who use the TriMet transit pass program.
- **TriMet Vanpool Shuttle Program:** TriMet supports three employers operate a vanpool by covering the lease expense of operating the van.

Program Evaluation

Between January 2009 and June 2011, the number of employers participating in the TriMet employer outreach program increased by 20% (from 1,210 to 1,454). Over the same period, TriMet assisted 694 employers with the ECO survey. Figure 8 below shows the mode share for employers working with TriMet, based on the ECO or TriMet survey data.

Figure 8 2010-2011 Commute Trip Mode Share for TriMet Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	73%	67%	-6
Transit	12%	16%	4
Bike	4%	6%	2
Carpool	9%	8%	-1

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Comp Work Week	1%	2%	1
Telecommute	0%	2%	2
# Worksites = 728			
# Eco Eligible Employees = 151,963			

Source: TriMet & ECO Survey Data

Wilsonville SMART Outreach Program

The Wilsonville SMART Options program includes five components: (1) employer outreach; (2) community outreach; (3) SMART Transit support; (4) Walk SMART; and (5) Bike SMART. These programs are based on a workplan received during Metro’s budget process. An important component of the program is to promote and encourage ridership on SMART and WES to ensure the success of the new light rail line.

The primary goals of the SMART Options program are to:

- Increase awareness and use of transportation options available in Wilsonville and the region
- Reduce drive alone trips
- Strengthen communication between SMART, the City of Wilsonville, Chamber of Commerce, local businesses, schools, and community organizations as a means of leveraging outreach efforts

The Wilsonville SMART Option program achieves its goals by reaching out to the community through walking and biking tours, brown bag lunches at City hall, distributing new resident welcome kits, and publishing media stories in the local newspaper. The Wilsonville SMART Options program also works with employers by assisting them with the ECO survey and developing trip reduction plans.

Fiscal year 2010-2011 programs include SMART Transit, Walk SMART, and Bike SMART.

Employer Outreach

As part of its program, Wilsonville works with employers in the region to comply with the ECO rule. To calculate mode split, employers are surveyed in a baseline year and then surveyed again a year or more later to show the change in model split.

The employer survey database included 17 Wilsonville worksites with survey data for the 2010-2011 evaluation period (see

Figure 9 below). Drive alone trips were reduced 3 percentage points due to an increase in transit, comp work week schedules, and telecommuting. Interestingly, carpooling decreased by 2 percentage points and biking remained constant.

Figure 9 2010-2011 Commute Trip Mode Share for Wilsonville Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	84%	81%	-3

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 Metro Regional Travel Options Program

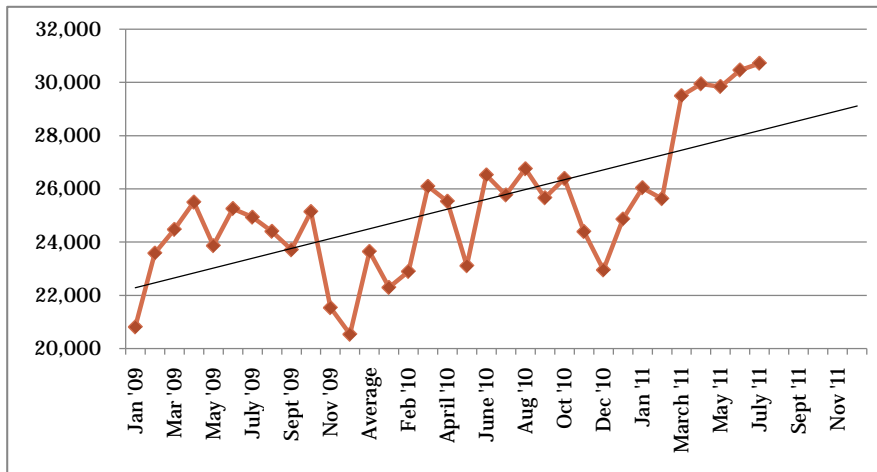
Transit	1%	3%	2
Bike	1%	1%	0
Carpool	12%	10%	-2
Comp Work Week	1%	2%	1
Telecommute	1%	3%	2
# Worksites = 28			
# Eco Eligible Employees = 4,493			

Source: TriMet & ECO Data

SMART Transit

The success of the SMART Options program was also evaluated based on the change in SMART ridership over time. Between January 2009 and July 2011, ridership on SMART transit increased considerably (see Figure 10 below). Ridership increased from 23,644 riders in 2009 to 24,862 riders in 2010 to 28,876 riders in 2011 (as of July). This represents a 22% increase in riders between 2009 and 2011. Although this data shows a positive trend during the evaluation timeframe, the change in ridership cannot be linked directly to Wilsonville SMART efforts. However, it is supporting data to show that travel behavior in the Wilsonville region is changing to alternative transportation modes.

Figure 10 SMART Transit Ridership, January 2009 - November 2011



Source: Data received from Metro RTO staff

Bike SMART/Walk SMART

In an effort to improve the pedestrian and biking experience in Wilsonville, SMART launched its Bike SMART and Walk SMART programs. These programs provide promotional material and services to help people take more biking and walking trips.

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The City of Wilsonville's SMART Options program was able to expand by hiring the Bicycle and Pedestrian Coordinator to implement priorities set forth in the City of Wilsonville's Bicycle/Pedestrian and Transit Master Plan. This staff person supports the Bike SMART and Walk SMART programs that develop tools such as maps and brochures to help people take more biking and walking trips.

A large component of the Bike/Walk SMART programs is to increase awareness of biking and walking facilities. The program developed a Wilsonville Bike and Walk Map. As of July 2011, Wilsonville SMART had distributed 4,242 bike and walk maps. Wilsonville SMART also conducted bike and pedestrian counts at 13 locations in September 2010. This is the first time that Wilsonville has conducted bike and pedestrian counts. In 2011, counts will be conducted again in the same location to make conclusions about behavior change.

Transportation Management Associations (TMAs)

This section evaluates the six active TMAs at the time of the evaluation period.

Clackamas County TMA

The Clackamas County was managed by the North Clackamas County Chamber of Commerce. It worked with employers in the Clackamas Town Center Regional Mall, Clackamas Industrial Park, Kaiser Sunnyside Hospital Campus, Omark Industrial Park, Johnson Creek Industrial Area, Sunnyside Road east to 172nd Ave. and Harmony Road to Railroad Avenue and west to Highway 224 to decrease the demand on the regional transportation system by facilitating non-SOV transportation options.

Program Evaluation

The RTO Subcommittee decided to close the Clackamas County TMA in June 2011. Stakeholder interviews revealed the following reasons for the closing:

- The TMA did not have enough education on the types of programs that could be implemented in a suburban setting.
- The TMA struggled to get employers to fill out the ECO survey; employers in the TMA geographic boundary either did not fall under ECO requirements, chose to ignore ECO requirements, or did not demonstrate a change in mode split. Therefore, the TMA could not demonstrate their success.
- The geographic area of the TMA was limited; Metro RTO staff did not permit them to change their geographic boundary.
- The TMA was linked too closely to the Chamber of Commerce; as such, the Board of Directors was pulled between Chamber and TMA responsibilities.

Gresham Regional Center TMA

The Gresham Regional Center Transportation Management Association (GRCTMA) works with businesses, public agencies, and citizens to improve access options and enhance the local economy. The GRCTMA is managed by the Gresham Downtown Association and helps employees travel to work and to other destinations safely and easily using alternative modes of transportation.

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The GRCTMA provides tailored transportation options support to employers, event planners, and residents.

Program Evaluation

As of 2011, the GRCTMA worked with 7 employers with a total of 1,537 employees who participated in the ECO or TriMet Employer Pass program survey. Twenty-three percent of employees commute to these worksites using non-SOV modes, 11% higher than the baseline survey (see Figure 11 below). Also of note is the stark increase in carpooling (a 6 percentage point increase between the baseline and current survey).

Figure 11 2010-2011 Commute Trip Mode Share for Gresham TMA Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	88%	77%	-11
Transit	5%	6%	1
Bike	2%	4%	2
Carpool	4%	10%	6
Comp Work Week	1%	2%	1
Telecommute	0%	1%	1
# Worksites = 7			
# Eco Eligible Employees = 1,537			

Source: TriMet & ECO Data

Figure 12 and Figure 13 below outline the contract goals and compare them to the actual accomplishments, as described in the GRCTMA progress reports. In 2010 and 2011, the GRCTMA reported on outputs (i.e. # of events attended and # of surveys completed) but did not provide a calculation to reflect their efforts in relation VMT reduction (as outlined in their contract).

Figure 12 Gresham Regional Center TMA Evaluation, 2010

Contract Goals	Actual Accomplishments
Community outreach: DLSP, bike rack survey, website update, bike safety fair, downtown event participation, "Try" marketing campaign	Launched new website; held transportation fair – 1,000 people participated; bike rack survey completed; "Try" campaign ads published
Employer outreach: survey 80 new GRC employers – facilitate 40 new GRCTMA members	Survey distributed to 408 Gresham Station employers; 87 surveys were returned (not noted if these were new GRC employers)
Assist TMA members to fill out ECO survey, join CarpoolMatchNW, facilitate vanpools	28 employers receive newsletter; made contact with 36 new employers; had formal meetings with 4 new employers who agreed to participate in TMA activities "to some degree"
Distribute Welcome packets to new employees	n/a
Get 10 new employment sites to participate in Bike Commute Challenge	Participated in challenges, but no note of how many new employment sites were achieved
Measure the trip activity of 1,500 employees, 100	Event survey: surveyed 103 event attendees;

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Carefree Commuter Challenge participants, and 1,500 event attendees	
Measure the usage of 630 bike racks and 7,374 parking stalls	Bike rack counts were done
Have GRCTMA-sponsored transportation options information in over 45,000 copies of various publications/printed material this year	n/a
Goal: 1,500,000 VMT reduction	n/a

Figure 13 Gresham Regional Center TMA Evaluation, 2011

Contract Goals	Actual Accomplishments
Community outreach (DLSM, bike rack survey, website update, bike safety fair, downtown event participation, "Try" marketing campaign)	Launched new website; held transportation fair – 1,000 people participated; held walking tours (attendance was low); 300+ people attended the transportation safety fair
Employer outreach: add 15 new employers GRCTMA employer outreach program	n/a
Assist TMA members to fill out Eco survey, join CarpoolMatchNW, facilitate vanpools	No mention of ECO survey in evaluation report
Develop individualized marketing program to employees using the Portland SmartTrips model	More than half of the pledgers who completed the survey were already making as many non-SOV trips as possible before they took the pledge; no quantitative data is provided from the before and after surveys
Measure the trip activity of 1,000 employees, 100 Carefree Commuter Challenge participants and 20 summer event participants, 100 customers, 100 transit riders, and 1,000 attendees	Event survey: surveyed 62 event attendees; there is a report for transportation options for employees, but it does not mention how many surveys were distributed or what the results were
Measure the usage of 630 bike racks and 7,374 parking stalls	Bike rack counts were done
Engage 500 employees to participate in the Carefree Commuter Challenge; 500 to participate in the Bike Commute Challenge	132 people participated in the CCC; reached 667 for the BCC
Have GRCTMA-sponsored transportation options information in over 5,000 copies of various publications/printed material this year	n/a
Goal: 1,515,130 VMT reduction	n/a

Lloyd TMA

The Lloyd TMA (LTMA) continues to provide strong support to businesses in the Lloyd District. The LTMA's success over the years is attributed in part to its Pedestrian, Bike, and Transportation committees that all help to promote their respective travel modes through communications and special events. The LTMA has also developed an innovative funding stream in which revenues come from the Lloyd Business Improvement District; parking meters in the district; TriMet

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Commissions; and the Metro RTO program. This additional revenue should be taken into account when analyzing Metro’s return on investment for this program.

The LTMA also operates the Lloyd District Commuter Connections store, which sells TriMet and C-TRAN passes, and other resources for biking, walking, and taking transit to work.

Program Evaluation

As of 2011, the Lloyd TMA had 80 member businesses. Of those, 68 businesses were surveyed as part of the ECO survey or Trimet Employer Pass program. Forty-four percent of employees commute to the Lloyd District using non-SOV modes (see Figure 14 below).

Figure 14 2010-2011 Commute Trip Mode Share for Lloyd TMA Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	62%	56%	-6
Transit	19%	25%	6
Bike	4%	5%	1
Carpool	13%	9%	-4
Comp Work Week	1%	3%	2
Telecommute	1%	2%	1
# Worksites = 68			
# Eco Eligible Employees = 12,017			

Source: TriMet & ECO Data

Figure 15 and Figure 16 below outline the contracted goals for the Lloyd TMA in comparison to the actual accomplishments as outlined in the LTMA 2010 and 2011 annual reports. In 2010, although VMT reduction goals were exceeded, transit use dropped 0.3% and increased walking goals were not met by 0.5%. The carpool/vanpool mode-split also decreased from 10.3% to 10%.

Figure 15 Lloyd TMA Evaluation, 2010

Contract Goals	Actual Accomplishments
Measure the trip activity of nearly 6,000 employees each year	Completed
Maintain and/or exceed 4,236,578 VMT reduced	Actual VMT reduced: 4,296,918
Increase employee use of transit from 39% to 42% of all commute trips	Transit use dropped by 0.3%
Increase employee bicyclist trips to the Lloyd District from 4.8% to 5% of all commute trips	Bicycle mode split increased to 5.9%
Increase the number of pedestrian commuters to the Lloyd District from 2.4% to 3.0% of all commute trips	Walking increased to 2.5%
Maintain existing level of employee use of car/vanpooling as a commute option (10% commute mode split)	Carpool/vanpool dropped from 10.3% to 10%
Continue efforts to fund pedestrian safety and amenity	Completed

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improvements throughout Lloyd District	
Increase employee and employer awareness of Lloyd District transportation options through staff outreach, communications and events	Completed
Continue to develop an organization that effectively supports and advocates the long-term economic vitality and livability of the Lloyd District	Completed

In 2011, the Lloyd TMA exceeded its VMT reduction goals by 158,669 VMTs. Transit use increased slightly to 39.3%. Of note, bicycling trips to the Lloyd District decreased from 5.9% to 4.8% and walking decreased from 2.5% to 1.7%.

Figure 16 Lloyd TMA Evaluation, 2011

Contract Goals	Actual Accomplishments
Measure the trip activity of nearly 6,000 employees each year	Completed
Maintain and/or exceed 4,296,918 VMT reduced	Actual VMT reduced: 4,455,587
Increase employee use of transit from 39% to 42% of all commute trips	Transit increased to 39.3%
Increase employee bicyclist trips to the Lloyd District from 5.9% to 6.1% of all commute trips	Bicycle mode split decreased to 4.8%
Increase the number of pedestrian commuters to the Lloyd District from 2.5% to 2.9% of all commute trips	Walking decreased to 1.7%
Maintain existing level of employee use of car/vanpooling as a commute option (10% commute mode split)	Carpool/vanpool rates decreased to 9.1%
Continue efforts to fund pedestrian safety and amenity improvements throughout Lloyd District	Completed: established a pedestrian committee to address pedestrian concerns
Increase employee and employer awareness of Lloyd District transportation options through staff outreach, communications and events	Completed
Continue to develop an organization that effectively supports and advocates the long-term economic vitality and livability of the Lloyd District	Completed

Swan Island TMA

The Swan Island Transportation Management Association brings together area employers and regional agencies to expand transit service, improve pedestrian and bicycle access, and increase rideshare opportunities for employees in an effort to reduce traffic on the Island.

Program Evaluation

As of 2011, Swan Island worked with 12 employers with a total of 2,334 employees who participated in the ECO or TriMet Employer Pass program survey. The non-SOV mode split for Swan Island employers actually decreased between the baseline and recent surveys by two

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percentage points. Twenty percent of employees commute to these worksites using non-SOV modes, a 2 percentage point decrease since the baseline survey was taken (see Figure 17 below). Transit ridership and comp work week schedules remained the same, carpooling decreased 4 percentage points, and biking increased one percentage point. The decrease in the non-SOV mode split could be attributed to the following factors: (1) Select weekday trips for the 85 bus line to Swan Island were cut due to low ridership in May 2010; (2) Of the 12 worksites surveyed, 5 sites increased their drive alone rate, and one site continued to have 100% drive alone rate since the base line year. Further investigation as to why these 5 sites increased their drive alone rates is needed.

Figure 17 2010-2011 Commute Trip Mode Share for Swan Island TMA Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	78%	80%	2
Transit	7%	7%	0
Bike	2%	3%	1
Carpool	2%	3%	-4
Comp Work Week	1%	1%	0
Telecommute	0%	1%	1
# Worksites = 12			
# Eco Eligible Employees = 2,334			

Source: TriMet & ECO Data

Figure 18 and Figure 19 outline the contract goals for the Swan Island TMA in 2010 and 2011. The performance of the Swan Island TMA is difficult to conduct because no annual report was submitted in 2010. Some accomplishments can be gleaned from the quarterly invoices, however, actual outcomes in terms of VMT reduced could not be calculated with the information provided.

Figure 18 Swan Island TMA Evaluation, 2010

Contract Goals	Actual Accomplishments
Increase transit ridership by 50% (85 Swan Island from 500 to 750 rides per day; Swan Island Evening Shuttle from 60 to 90 rides per day)	
Reduce 630,000 vehicle miles of travel for trips to, from and within the Swan Island TMA service area annually (150 new transit riders x 16.8 miles round trip x 250 workdays per year)	n/a
Increase employment sites participating in a transportation program from 9 to 15	
Increase non-SOV mode split from 20% to 25% among participating employment sites	n/a
25 additional bike commuters and 25 van or carpool riders reducing an additional 210,000 vehicle miles of travel	
The TMA expects to maintain vehicle miles of travel	No VMT reduction or ridership information was provided

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reductions at 9 employment sites that have subsidy programs and conduct surveys. Previous ECO survey results show approximately 665,000 VMR annually	in the annual report.
Grand total vehicle miles reduced goal for all tasks is 1,505,000 VMR annually	n/a
Distribute New Employee Kits to 500 new or relocating employees at TMA member businesses	Distributed 150 new employee kits
Partner with C-TRAN to establish three new Clark County vanpools	Completed.
Facilitate 5 new employment sites with 1,000 employees to compete in the BTA Bike Commute Challenge in September 2009	n/a
Facilitate 12 TMA members with 8,000 employees to participate in the July 2009 Carefree Commuter Challenge	n/a

Figure 19 Swan Island TMA Evaluation, 2011

Contract Goals	Actual Accomplishments
Restore transit ridership on TriMet 85 Swan Island to 450 trips per day. Increase Swan Island Evening Shuttle 100 rides per day.	n/a
Reduce 1,500,000 vehicle miles of travel for trips to, from and within the Swan Island TMA service area annually	n/a
Increase employment sites participating in a transportation program to 12	n/a
Increase non-SOV mode split from 20% to 25% among participating employment sites	n/a
50 additional year round bike commuters and 100 van or carpool riders = 750,000 VMT reduction	n/a
Swan Island individualized marketing campaign (Booster grant) based on City of Portland's SmartTrips expected to shift an additional 100 commutes to non-drive alone modes, reducing 500,000 VMT	n/a
Grand total vehicle miles reduced goal for all tasks is 1,500,000 VMR annually	No VMT reduction or ridership information was provided in the annual report.
Manage Emergency Ride Home program for members	Completed
Provide Eco survey support to 6 employers	n/a
Host transportation fairs	Completed
Distribute new employer kits	Completed
Promote bike/ped facilities and engage employees in bike commute challenges	Completed
Launch "Going to the Island" marketing campaign	Completed; reached 1,500 employees

South Waterfront TMA

The South Waterfront TMA was established in July of 2010 in response to the new and growing South Waterfront neighborhood. The TMA is part of a greater community development effort in the neighborhood working to create a vital neighborhood, particularly working to bridge the gap between the hardscape and the softscape.

To start, the South Waterfront TMA conducted an annual survey to document a baseline mode split. This also provides them with a qualitative understanding about what people value and need in the community. Because this TMA is still in the early stages of development, it was not reviewed in further detail during this evaluation period.

Westside Transportation Alliance

The Westside Transportation Alliance (WTA) provides programs and services to employers to help them reduce single occupancy vehicle (SOV) trips and greenhouse gas emissions, foster economic vitality, and improve health. The WTA services employers in Washington County, Beaverton, Hillsboro, Tigard, and Tualatin to decrease demand on the regional transportation system by increasing awareness of transportation options. Services provided to employers include ECO survey guidance and individualized auto trip reduction plans.

Program Evaluation

As of 2011, the WTA worked with 40 employers with a total of 19,573 employees who participated in the ECO or TriMet Employer Pass program survey. Twenty-three percent of employees commute to these worksites using non-SOV modes, five percentage points higher than the baseline survey (see Figure 209 below). Transit increased 3 percentage points, while carpooling decreased 3 percentage points between the baseline and current survey.

Figure 20 2010-2011 Commute Trip Mode Share for WTA Worksites

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	82%	77%	-11
Transit	5%	8%	1
Bike	3%	4%	2
Carpool	9%	6%	6
Comp Work Week	1%	2%	1
Telecommute	0%	3%	1
# Worksites = 40			
# Eco Eligible Employees = 19,573			

Source: TriMet & ECO Data

Figure 20 and Figure 21 below outline the WTA contract goals and compare them to the actual accomplishments during the evaluation period.

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Figure 21 WTA Evaluation, 2010

Contract Goals	Actual Accomplishments
Reduce 4,000,000 vehicle miles of travel for trips to, from and within the TMA service area annually.	No VMT reduction numbers are reported in the annual report, but their 2010-2011 contract reported that the 2008-2009 evaluation showed a 3.4 million VMT reduction.
Increase employment sites participating in a transportation program from 32 to 47. This includes 32 current sites and 15 new sites.	Accomplished. WTA continued to work with 32 current employment sites and added 19 new sites.
Increase non-SOV mode split from 18% to 20% among participating employment sites.	No mode split numbers are reported in the annual report.
1 driver and 7 passengers willing to form a vanpool originating at least 10 miles away.	Vanpool outreach was done, but the WTA reported no new drivers.
Facilitate 25 new CarpoolMatchNW registrants as measured by entries in the CarpoolMatch database.	Four registrants were recorded in the first three quarters. The WTA also developed a Carpool Board where employees place tags from origination cities in an area designated for their shift. Pacific Natural Foods is using the prototype. Although the WTA observed the board was being used, they could not confirm any matches.
Assist 12 employers in sending employee home location data to Metro for rideshare potential geocoding. Use map created by Metro to help employees form carpools.	Although they promoted the geo-coded maps in all of their presentations and the order form is part of their work plan binder and on CD, they did not record any orders for maps this year.
Facilitate 10 new employers to join TriMet's Universal, Select or Direct pass programs.	2 new employers joined TriMet's Universal, Select or Direct pass program.
Promote the WTA online incentive program, Westside Commuter Club, using the DriveLessSaveMore.com trip diary tool to track trips and deliver incentives provided by employers.	There is little interest by employers in offering employee incentives in this difficult economic scenario. In addition, the WTA reported that tallying trips may be too intense, and the motivation of counting carbon is not as compelling they thought.
Promote the benefit of sharing and celebrating ECO results with employees. Offer 10 PowerPoint presentations tailored to each company's ECO report and include cost savings realized by the company transit benefit, or pre-tax deduction, and site specific facilities for bike parking.	Completed.

Figure 22 WTA Evaluation, 2011

Contract Goals	Actual Accomplishments
Reduce 500,000 vehicle miles of travel for trips to, from and within the TMA service area annually.	No VMT reduction numbers are reported in the annual report.
Increase employment sites participating in a transportation program 47 to 62 (15 new sites).	Worked with 52 employers (5 new sites).
Improve WTA website.	Completed.
Participate in 6 employer transportation fairs.	Completed. Attended 10 employer transportation fairs.

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Contract Goals	Actual Accomplishments
Promote the September 2010 BTA Bike Commute Challenge.	Completed.
Community outreach to elected officials.	Participated in the following committees: Washington County Active Transportation Forum, Hillsboro 2020 Vision Implementation Committee, Transportation Options Group of Oregon, Westside Economic Alliance Transportation Committee.
Develop customer service satisfaction survey to cities and businesses using WTA services.	Completed.
Start outreach to fourth city, Tualatin.	Not mentioned in annual report or workplan.
Promote the benefit of sharing and celebrating ECO results with employees. Offer 10 PowerPoint presentations tailored to each company's ECO report and include cost savings realized by the company transit benefit, or pre-tax deduction, and site specific facilities for bike parking.	Completed.

Travel Options Grants

This section evaluates the RTO Travel Options grants. Travel Options grants are distributed by the Metro RTO program and include programs that focus on travel options awareness, wayfinding and soft infrastructure projects (such as bike rack installations), and bike commute competitions.

BTA Bike Commute Challenge

The Bike Commute Challenge is a marketing campaign and challenge to increase the number of people biking to work in the region. The month-long challenge makes bike commuting a supported and fun workplace activity during September each year. The Challenge is a statewide event that also includes participants in SW Washington, but historically more than 85% of participants have been in the Portland Metro area. This program reduces SOV use and traffic congestion and improves air quality by encouraging people to try bike commuting.

Program Evaluation

Figure 232 outlines the goals outlined in the contract, compared to the actual accomplishments of the Bike Commute Challenge.

Figure 23 Bike Commute Challenge Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Teach 10 commute workshops in Clackamas County	Scheduled 12 workshops in Washington and Clackamas Counties in 2009 and 2010, but had to cancel three of them due to lack of RSVPs.
Increase miles replaced by 5% to 177,389 by 2010	1,020,898 bike miles logged; 2010 total miles biked by new and "drive alone" bike commuters = 847,265 miles
	2009 post-program ODOT survey shows a 0.5% increase in transit use, carpooling, and biking following the

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	September challenge.
Increase the number of workshops in schools to 10 over two years.	Taught 16 workshops.
Increase the total number commute workshops to 150 over 2 years.	The BTA taught 154 workshops over two years reaching more than 2,000 individuals with our program to increase confidence, safety, and comfort bike commuting.
Improve year-round marketing materials.	The BTA worked with in-kind partner Grapheon Design to promotional poster and website design with different themes for each year's program.
Increase participation in all challenge categories by at least 5% over 2007 numbers.	The BTA increased participation of workplaces by 45% and participation of individuals by 14% over 2007 numbers. Increased participating employers to 1,240 in 2009; to 1,283 in 2010.

City of Gresham Bike/Ped Wayfinding

The goal of the Gresham Wayfinding project was to increase the number of bicycling, and walking trips taken by residents and employees of the City of Gresham by providing pedestrian and bicycle signage with directions and distances to major destinations. Other goals included encouraging a reduction in single occupant vehicle trips, reducing the vehicle miles driven by area residents, increasing the awareness and raising acceptability of all modes of travel, and increasing neighborhood mobility and livability. The directional signs included information that pointed pedestrians and bicyclists to food, transit, and shopping areas.

Program Evaluation

Figure 243 below outlines the goals outlined in the contract, compared to the actual accomplishments of the City of Gresham Bike/Ped Wayfinding signs.

Figure 24 City of Gresham Bike/Ped Wayfinding Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Reduce auto trips by 2 percent	This information was not calculated in the annual report.
Increase bicycling 5 percent, walking 5 percent, and transit 2 percent	This information was not calculated in the annual report. However, the survey reports that the bicycle guide has caused 52% of respondents to increase their number of bicycle trips.
A minimum return of 15 percent of the surveys distributed	The survey spreadsheet does not include a total number of surveys distributed; it does note that roughly 100 people answered the survey.
Place two media stories in area papers, newsletters, radio and television outlets	No media stories were mentioned in the annual report.
Increase awareness of the "Drive Less. Save More" marketing campaign	Drive Less. Save More was not mentioned in the annual report. Unclear if awareness was increased.
Increase awareness of existing pedestrian, bicycle, and	City held "Way to Go Fair," Bike to Work Day, 103 way-

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transit facilities	finding signs were installed by the end of June 2010, the Gresham Bicycle Guide was designed and delivered to 10,000 people.
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City of Tigard Bike Map

The Tigard Bike Routes map was intended to increase the number of bicycling trips taken by residents while decreasing the number of drive-alone trips. The project aimed to reach approximately 4,000 households in the City of Tigard.

Program Evaluation

Figure 24 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

Figure 25 City of Tigard Bike Map

Contract Goals	Actual Accomplishments
Place three media stories in area newspapers and in the <i>Cityscape</i> Newsletter mailed to 22,800 addresses within the Tigard area	No evaluation report on file.
Get 500 hits on the city webpage version of the bike map	
Distribute 4,000 maps to the city population	

Comment [b5]: Caleb, Last I heard, Dan had still not received a progress report for this project. Do you know the status?

Community Cycling Center Barriers to Biking

The “Identifying and Overcoming Barriers to Bicycling” project was intended to increase the awareness and acceptability of bicycling as a transportation option among minority and low-income participants in North and Northeast Portland by creating a culturally-specific program designed to meet the unique needs of the community. The project goal was to reach 250 people through ten community organizations by developing and implementing a culturally-appropriate needs assessment process that ranged from surveys to focus groups. The results of the needs assessment were to be used to inform a pilot program targeted to minority and low-income residents to promote the “Drive Less, Save More” campaign in order to increase bicycling trips and reduce car trips. This effort was part of the City of Portland Bicycle Master Plan for 2030.

Program Evaluation

Figure 265 below outlines the goals outlined in the contract, compared to the actual accomplishments of the Community Cycling Center Barriers to Biking program.

Figure 26 Community Cycling Center Barriers to Biking Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Identify barriers and opportunities for bicycling in NE/N Portland who are women, African American, Latino/Hispanic or low-income through culturally specific assessment sessions	Surveyed over 150 community members and gathered in-depth feedback from over 50 residents of affordable housing communities to learn about their interest in and concerns about bicycling
Design a pilot program that addresses culturally specific	Taught 350 adults bike safety and maintenance skills

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barriers	
Develop relationships with diverse community members	Held 75 meetings with leaders within communities of color

Bicycle Safety Equipment and Bicycle Rack Project

The Gresham Bicycle Safety Equipment and Bicycle Rack project consisted of three primary tasks: (1) a bicycle helmet and safety equipment giveaway at a public event; (2) a bike rack installation in downtown Gresham; and (3) a final report documenting the project outcomes.

Program Evaluation

Figure 27 below outlines the contracted program goals compared to the actual accomplishments.

Figure 27 Gresham Bicycle Safety Equipment and Bicycle Rack Project, 2010-2011

Contract Goals	Actual Accomplishments
A bicycle helmet and safety equipment giveaway at a public event	Completed
A bike rack installation in downtown Gresham	Completed
A final report documenting the project outcomes	No final report was submitted

Lloyd TMA Lloyd Links

Lloyd Links was the Lloyd TMA's individualized marketing program that targeted Lloyd employees who expressed an interest in changing their travel mode from drive alone to transit, biking, walking and/or rideshare. The program focused on linking Lloyd employees from their residential neighborhoods to their Lloyd work sites via personal contact and direct one-on-one assistance.

Program Evaluation

Figure 24 below outlines the goals outlined in the contract, compared to the actual accomplishments of the Lloyd Links program.

Figure 28 Lloyd Links Program Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Conduct two surveys (one before program and one after)	Completed
Increase employee use of transit from 39% to 42% of all employee commute trips	See Lloyd TMA evaluation above
Increase employee bicyclist trips to the Lloyd District from 4.6% to 5% of all commute trips (LTMA member businesses)	See Lloyd TMA evaluation above
Maintain existing level of employee use of car/vanpooling as a commute option (10% commute mode split).	See Lloyd TMA evaluation above

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Per the contract, The Lloyd Links program will be integrated into the overall mode split and VMT goals of the LTMA	See Lloyd TMA evaluation above
Attend transportation fairs.	Attended 8 transportation fairs
Reach all members at least 7 times; exchange information at least once with interested parties	Completed
Connect with 1,125 individuals each year	Completed
Increase awareness of all Lloyd TMA programs as well as DLSP	Completed

PSU Long-Term Bike Parking

PSU faculty, students, and staff identified a lack of secure and covered parking on campus. In an effort to promote more bicycling, this project developed a long-term bicycle parking structure that would hold a minimum of 75 bikes, would be ADA compliant, and would be a secure, 24-hour key-card access facility.

Program Evaluation

Figure 29 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

Figure 29 PSU Long-Term Bike Parking Evaluation 2010-2011

Contract Goals	Actual Accomplishments
Install bike facility with a minimum of 75 bikes	Installed 71 bike parking stalls in the covered facility; 6 covered bike racks outside of the facility
	At the end of Spring term 2011, there were a total of 46 bike garage users (users are required to have a permit)

Sunday Parkways

Portland Sunday Parkways promotes healthy active living through a series of free events that opens the city's streets for walkers, bikers, and roller skaters. The goal of this project was to significantly increase the community's awareness of the role of transportation with respect to air quality, global warming, and peak oil.

Program Evaluation

Figure 30 and Figure 31 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

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Figure 30 Sunday Parkways Evaluation, 2010

Contract Goals	Actual Accomplishments
Use media campaign to reach over 50,000 households	Completed.
Hold 3 Sunday Parkways events	Held 3 events: North Portland, Northeast Portland, Southeast Portland.
Engage over 15,000 residents to participate in each Sunday Parkways event	North Portland: 15,000 participants; Northeast Portland: 22,000 participants; Southeast: 25,000 participants.

Figure 31 Sunday Parkways Evaluation, 2011

Contract Outcomes	Actual Outcomes
Use media campaign to reach over 50,000 households; reach households at least 3 times	Completed.
Hold 5 Sunday Parkways events	Held 3 events: North Portland, Northeast Portland, Southeast Portland.
Involve 200 neighborhood associations or other community organizations to help plan the events.	Involved 250 organizations.
Recruit 100,000 participants to walk, bike and participate in the 5 events (total)	91,000 participants in 5 events total.

Swan Island TMA Trip Not Taken

The purpose of the Swan Island Trip Not Taken program was to reduce VMT by helping people live closer to where they work. The project had two objectives: (1) to help Swan Island employees discover North/Northeast Portland by providing information on home ownership, shopping, and other amenities; and (2) to help area residents discover Swan Island as a place to work by providing information about job opportunities.

Program Evaluation

Figure 32 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

Figure 32 Swan Island TMA Trip Not Taken Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Program will be measured by an increase in employees of Swan Island employers who have home zip codes within the project area	Michael Andersen's analysis of zip code data for Swan Island, Rivergate and Columbia Corridor offered evidence that a trend to longer commutes was significantly muted on Swan Island in comparison to the other two nearby employment areas
Gather baseline data	Completed
Develop employment collateral	Completed

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Develop home ownership collateral	Completed
Swan Island will reach out to all Swan Island TMA members; plus 6 more in 2007; plus 20 more in 2008	Completed
Attend 4 job fairs	Completed
Conduct independent evaluation of program – analyze #85 bus line ridership, ECO data, and other employment and housing trends	Not clear if this was actually completed

Trimet Beaverton Transit Center Electronic Bike Lockers

This project installed sixteen bike lockers at the Beaverton Transit Center. After the bike lockers were installed, their effectiveness was evaluated as a strategy to encourage biking to transit.

Program Evaluation

The project goal in the contract for this project reads as follows: “electronic bike lockers have the potential to shift 64,000 auto trips to bicycling and transit within the two-year life of the grant and shift 228,000 trips over a 10-year period (well within the lifespan of the lockers).

The bike lockers were installed in July 2011. The Bike & Ride facility has a capacity of 100 bikes. In September 2011, the facility averaged 24 bikes per day. No data has been collected to date to show how many auto trips have actually been shifted based on these bike racks. Moreover, due to the recent installation of these bike racks, the assessment of the use of these bike lockers is most likely premature.

Trimet Open Source Trip Planner

This project will test the usability of an Open Source Multi-Modal Trip Planner System (OS MMTPS) for a public transit agency. As designed, the test system should increase the number of biking, walking, and transit trips taken by Portland Metro area residents while decreasing the number of drive-alone trips. The system will be in beta in the Fall of 2011. Complete evaluation of this program will be conducted in the next biannual evaluation report.

WTA Bike Rack Program

The Bike Rack Grant program installed a total of 35 bike racks available to businesses that participate in the Westside Commuter Club (WCC), a component of the Westside Transportation Alliance (WTA). The new bike racks were marketed to businesses along the Westside Express Service (WES) commuter rail corridor as part of the auto trip reduction services offered by the WTA. When only one employer expressed interest in the program, the project scope was expanded to include retail locations in downtown Tigard.

Program Evaluation

Figure 33 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

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Figure 33 WTA Bike Rack Program Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Install 35 bike racks in front of interested employment sites; provide \$100 to cover permit fees	Installed 25 bike racks
An online survey will be conducted at the beginning and at the end of the project at each employer location	Of the riders surveyed, 86% of respondents reported that the bike racks encouraged them to ride their bikes to downtown Tigard; of the businesses surveyed, 61% of participating businesses reported that the racks were used more than once a week, while 54% of them said that the racks were good for business

WTA Carefree Commuter Challenge

The goal of the Westside Transportation Alliance Carefree Commuter Challenge (CCC) project was to increase the number of bicycling, walking, transit, and carpool trips taken by employees in the Metro region while decreasing the number of drive-alone trips. The non-SOV trips were tallied by employees using the DLSM online trip diary. WTA staff analyzed the data at the close of the Challenge.

Program Evaluation

Figure 34 below outlines the program accomplishments compared to goals as outlined in the Metro RTO contract.

Figure 34 WTA Carefree Commuter Challenge Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Invite 2,500 employers to participate in the CCC	Completed
Participating companies will increase by 50% from 209 to 314	Participating companies decreased to 202
Participating employees will increase by 25% from 4,548 to 5,685	Participation goals were not met. 2,200 employees participated
Vehicle miles saved will increase by 20% to 1,517,982 in 2009	Total Miles: 41,584 1-way trips
Reach all TCs at least 15 times with transportation options messages by e-mail	Completed
Place 2 media stories in area papers, and 2 newsletters	Completed
Increase awareness of the "Drive Less. Save More." marketing campaign by using the logo on web site and printed material and by pointing people to the trip diary	Completed

Individualized Marketing

City of Gresham Civic Drive

The Gresham Civic Drive Station project is an individualized marketing program to increase the number of bicycling, walking, transit, and carpool trips taken by residents in the vicinity of the new Civic Drive MAX station. In partnership with the Gresham Regional Transportation Management Association (TMA), the project targeted close to 3,000 households near the new Gresham Civic Drive MAX station. As of October, 2011, the post-marketing survey had not been completed; therefore, only the program “outputs” were evaluated during this process. Program outcomes will be evaluated upon completion of the post survey.

Program Evaluation

Figure 35 below outlines the program accomplishments of the Gresham Civic Drive program compared to goals as outlined in the Metro RTO contract.

Figure 35 City of Gresham Civic Drive, 2010-2011

Contract Goals	Actual Accomplishments
Decrease drive alone trips by 4%	The post-survey for this project has not been completed; therefore mode-split changes are not yet available.
Involve 12% of the population at least once	n/a
Reach all residents at least 5 times; interested residents 10 times	n/a
Involve 35% of target population in one program or project	23% of the target population ordered materials or participated in one of the SmartTrips outreach events.
Place 10 media stories in local media	n/a
Increase awareness of “Drive Less. Save More.” marketing campaign	n/a

City of Portland Greenline SmartTrips

The Portland Greenline SmartTrips project was launched in 2009 to reach 27,684 households in Portland neighborhoods within one-half mile of the new MAX Green Line or west of 112th, east of 72nd, north to the Gateway area and south to city boundary. Businesses in these areas could choose to participate in the program through the “SmartTrips Business” program. The primary goal of the project was to get more residents in the identified neighborhoods to use the new MAX line, thereby reducing drive alone trips and VMTs. The program was also intended to increase the awareness of other modes, such as biking, walking and ridesharing.

Program Evaluation

Figure 36 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

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Figure 36 City of Portland Greenline SmartTrips Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Decrease drive alone trips by 8%	Residents reduced their drive-alone trips by 18.4%
Reduce VMT by 8%	Average daily per capita vehicle miles (drive alone only) were reduced by 2.95 miles per person per day; saved over 48 million VMT
Increase mode split for bicycling 20%, walking 10%, transit 20%, and carpooling 3%	Residents increased their environmentally-friendly modes by 30.4%; bicycling increased 9.5% in 17 east Portland locations; transit increased 15%; carpooling doubled
Reach all residents at least 5 times; interested residents 10 times	All residents in the target area were contacted at least 5 times
Involve 35% of target population in one program or project	Approximately 25% of those in target area (8,200 households) either ordered material or participated in an event
Place 5 media stories in local media	Placed media stories in local media – number not specified
Increase awareness of CarpoolMatchNW.org and increase the number of residents who log on to the site	Smart Trips Green Line mailer included information on CarpoolMatch.NW.org
Increase awareness of "Drive Less. Save More." marketing campaign	Not included in annual report

City of Portland SmartTrips NNW

The Portland SmartTrips North-Northwest project was launched in 2009 to reach 31,000 households in North and Northwest Portland neighborhoods. In North Portland, the project outreach was bounded by Peninsular on the East, the Willamette River on the South and West, and N Columbia Boulevard on the North. In Northwest Portland, the project outreach was bounded by Willamette River on the East, W Burnside Street on the South, NW Skyline Road on the West and NW Germantown Road on the North. These neighborhoods were selected for two primary reasons: (1) a partnership opportunity with Kaiser Permanente who agreed to sponsor the reprint of the North Portland Walking Map and the development and printing of the new Northwest Portland Walking Map; and (2) a high level of economic revitalization occurring in North West, North Portland, and the St. John's area.

The project brought individualized marketing to residents and businesses in growing neighborhoods that were part of the identified neighborhoods. The primary goal of the project was to get more residents in the identified neighborhoods to use transit, thereby reducing drive alone trips and VMTs. The program was also intended to increase the awareness of other modes, such as biking, walking and ridesharing.

Program Evaluation

Figure 37 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

Metro RTO Biennial Evaluation, January 2009 to June-2011
Metro Regional Travel Options Program

Figure 37 City of Portland SmartTrips NNW Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Decrease drive alone trips by 8%	Residents reduced their drive-alone trips by 9.3%
Reduce VMT by 8%	SmartTrips North/Northwest saved over 11 million VMT in 2009, which is equivalent to shifting just over one trip per week, per person in the target area, from driving alone to another, more environmentally-friendly mode such as walking, bicycling, or transit (or a net reduction of 1.01 VMT per person, per day, in the study area)
Increase mode split for bicycling 20%, walking 10%, transit 20%, and carpooling 3%	A 10.5% increase in environmentally friendly trips; transit increased from 3% to 7% of mode split; bicycling, walking and carpooling mode splits were not reported on specifically
Reach all residents at least 5 times; interested residents 10 times	All residents in the target area were contacted at least 5 times
Involve 35% of target population in one program or project	Of the 29,500 households in the target area, a total of 3,656 households ordered materials for a return rate of 12.6%.
Place 5 media stories in local media	Placed media stories in local media – number not specified
Increase awareness of CarpoolMatchNW.org and increase the number of residents who log on to the site	Smart Trips Green Line mailer included information on CarpoolMatch.NW.org
Increase awareness of "Drive Less. Save More." marketing campaign	Not included in annual report

City of Portland SmartTrips NNE

The Portland SmartTrips North-Northeast project was launched in 2010 to reach 23,000 households in north and northeast Portland. The project brought individualized marketing to residents and businesses in growing neighborhoods that are part of the identified neighborhoods outlined in the contract. The primary goal of the project was to get more residents in the identified neighborhoods to use transit, thereby reducing drive alone trips and VMTs. The program was also intended to increase the awareness of other modes, such as biking, walking and ridesharing.

Program Evaluation

Figure 38 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

Figure 38 City of Portland SmartTrips NNE Evaluation, 2010-2011

Contract Goals	Actual Accomplishments
Decrease drive alone trips by 8%	This project is not yet complete; report will be done late 2011.

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Reduce VMT by 8%	
Increase mode split for bicycling 20%, walking 10%, transit 20%, and carpooling 3%	
Reach all residents at least 5 times; interested residents 10 times	
Involve 35% of target population in one program or project	
Place 5 media stories in local media	
Increase awareness of CarpoolMatchNW.org and increase the number of residents who log on to the site	
Increase awareness of "Drive Less. Save More. marketing campaign	

Discover Wilsonville

Discover Wilsonville was an individualized marketing project to maximize awareness and use of the many travel options in and around the residential areas of Wilsonville. The goal was to increase bicycling, walking, and transit for short trips and to connect residential areas with Town Center and the regional travel options offered at SMART Central Station. The project also sought to benefit from the synergy of existing programs, including SMART Options, Walk Smart, and Bike Smart.

This project targeted 16,000 residents in 6,500 households in Wilsonville who live north of the Willamette River. This project worked alongside continuing development of Town Center commercial land and the infill of densely developed residential areas that aligns well with creating a transit and pedestrian friendly environment.

Program Evaluation

Figure 39 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

Figure 39 Discover Wilsonville Evaluation, 2010-2011

Contract Outcomes	Actual Outcomes
Decrease drive alone trips by 4%	No data available; post-survey was being completed as of November 2011. Final report will be completed by February 2012.
Increase mode share for biking, walking, public transportation, and carpool trips	n/a
Reach all residents at least 5 times; interested residents 10 times	n/a
Involve 12% of target population in one program or project	1,763 residents participated in 28 outreach events; 1,739 kits were delivered
Place 10 media stories in local media	n/a
Increase awareness of "Drive Less. Save More. marketing campaign	n/a

EVALUATION: LESSONS LEARNED

The evaluation process revealed opportunities for the Metro RTO program to improve its contracting, reporting, and evaluation processes. Lessons learned outlined in this section will help RTO to prioritize funding, communicate expectations to grantees, and evaluate its programs in an efficient and effective manner.

Contract Requirements

Metro RTO contracts are used to document the expectations of grantees. Each contract includes a description of the project, the project amount, and the contract dates. The contracts have varying levels of detail included in them. Some contracts include a detailed workplan by task to clearly identify dollar amount per deliverable. Other contracts include a narrative with project goals. While it is understood that some programs require more details than others, the Metro RTO program should consider standardizing the contracting language for similar programs, at the least. For example, individualized marketing projects did not include similar goals in the contracts. Discover Wilsonville's contract required them to generally reduce drive alone trips by 4%, while Portland SmartTrips programs included specific VMT reduction goals and mode split targets.

Reporting & Invoicing

Reporting and invoicing are important components of the RTO program; they are necessary to evaluate the success and needed outcomes of the program. This evaluation process revealed a number of opportunities for the RTO program to streamline the invoicing and reporting processes to improve efficiency and effectiveness.

Invoicing

Each grantee is expected to submit invoices with progress reports on a quarterly basis and a summarized report at the end of the program. In the stakeholder interviews, grantees expressed concern about the time spent on the invoicing process, noting that a lack of clarity in invoicing expectations contributed to the inefficiency of the process.

Annual & Biannual Reporting

During the evaluation process, it became apparent that program reporting requirements lacked clarity as well. Some grant recipients provided only the quarterly invoices with a progress report, while others submitted detailed annual reports. Some annual reports were very useful in the evaluation process because they spoke directly to goals outlined in the contract; other annual reports appeared to be more for marketing purposes and did not specifically speak to expectations outlined in the contract. Lack of consistent reporting made it very difficult to evaluate and compare the success of each program.

Reporting expectations also varied significantly. For example, the TriMet Employer Outreach program that receives nearly 15% of the RTO budget reported only on outputs (number of employees contacted, number of employer pass programs initiated, number of vanpool miles driven, etc.). Conversely, the City of Gresham was required to conduct a before and after survey to

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document the success of its wayfinding signs. The WTA Bike Rack Installation project (for \$15,000) was also required to conduct a before and after survey to show the affect of the new bike racks on travel behavior. The level of detailed reporting did not align with the program amount invested.

Reporting on VMT

Vehicle miles reduced (VMR) is an important performance measure for the RTO program. To comply with CMAQ requirements, the RTO program must prove its contribution to VMR in the region. However, the current evaluation process revealed a discrepancy in the number of programs required to report on VMR and the number of programs actually reporting on VMR. Moreover, a significant amount of money (roughly \$2.3 million of the 2010-2011 budget) disbursed by the RTO program did not expect VMR to be measured as an outcome. Of the 13 programs that were expected to report on VMR, only 7 programs actually reported on it.

Conclusion

Lessons learned outlined in this evaluation will be used to craft recommendations for the evaluation process in the 2012-2017 Strategic Plan process.



KEY QUESTIONS

- What outcomes should the Regional Travel Options (RTO) program strive to achieve?
- How can the RTO program more closely align with other Metro programs/investments?

WHAT WE HEARD

- The RTO program helps make the Portland-Metro region a great place through contributions to quality of life, economic development, health, and social and regional equity. However, RTO program contributions to Metro's broader goals are not well articulated in the Regional Transportation Plan (RTP) and planning discourse.
- The singular Vehicle Miles Reduced (VMR) performance target results in missed opportunities for the RTO program to demonstrate its contributions to other important regional outcomes.

OPPORTUNITIES

- Better link RTO program activities to other Metro programs by articulating goals that reflect and build on goals defined in the RTP.
- The RTO program evaluation framework is well developed and can help RTO play a leadership role in performance-based planning at Metro.

RECOMMENDATIONS

- Adopt a new mission statement that reflects RTO's contribution to making the region a great place.
- Adopt new performance targets aligned with a triple-bottom-line approach to performance evaluation.
- Strengthen support for the RTO program by stressing infrastructure and roadway operations cost savings.
- Integrate triple-bottom-line performance measures into the existing evaluation methodology developed by Portland State University.

Draft Mission

Make the Portland Metro Region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation, and are environmentally sustainable.

Draft Performance Measures

The triple-bottom-line framework can be tracked using non-SOV mode split as the singular performance measure. Per the Regional Transportation Plan (RTP), the regional non-SOV mode share target is 50 percent by 2035. Based on this goal, the RTO program should achieve at least an average 0.1 percent increase in non-SOV mode share per year during the five-year strategic planning period (2012-2107).

The table below outlines how the RTO program can translate non-SOV mode split into triple-bottom-line measures.

Example methods for converting Non-SOV trips into triple-bottom-line measures

	Conversion for reporting on Triple-Bottom-Line performance
Economic Benefits	<ul style="list-style-type: none"> ▪ Convert non-SOV trips into household cost savings and dollars returned to local economy. ▪ Convert non-SOV trips into number of parking spaces reduced and multiply by the average cost of parking to demonstrate direct economic savings. ▪ Convert VMR into a roadway capital and operating cost savings calculation to demonstrate the value of TDM in managing and operating the regional transportation system.
Social Benefits	<ul style="list-style-type: none"> ▪ Use Active Transportation proportion of non-SOV trips to measure improvements in health. ▪ Convert non-SOV trips into household transportation cost savings; in cases where the cost savings benefits are localized and housing costs are known, household cost savings could be converted into combined cost of housing and transportation.
Environmental Benefits	<ul style="list-style-type: none"> ▪ Convert non-SOV trips into VMR and multiply by standard emission rates per VMR to calculate emission savings for specific pollutants.

Draft Goals & Objectives

Goal 1: Align the RTO program with regional growth management and livability objectives

- *Objective 1.1* – Link RTO efforts to goals outlined in the Metro Regional Transportation System Plan (RTP).
- *Objective 1.2* – Support projects that provide information and services to geographically and socio-economically diverse populations.
- *Objective 1.3* – Work with other Metro programs and regional partners to make Travel Options an integral element of every transportation project.

Goal 2: Be a leader in developing local, regional, and national policies that promote walking, biking, transit and high-occupancy vehicle travel

- *Objective 2.1* – Develop programs that meet needs in urban centers, corridors, and suburban areas.
- *Objective 2.2* – Work with local jurisdictions to build local political and staff support.
- *Objective 2.3* – Support local jurisdictions in developing and implementing policies that support the RTO mission.
- *Objective 2.4* – Measure and evaluate the success of the RTO program to report progress, aid decision-making, and encourage innovation.

Goal 3: Support local partners to engage with employers and commuters to increase the use of travel options for commute trips

- *Objective 3.1* – Support local partners to market and provide travel options services to employers and commuters.
- *Objective 3.2* – Provide information and technical services to local and regional partners to make the business case for employers to support travel options.
- *Objective 3.3* – Address employer needs in transit underserved areas.

Goal 4: Develop tools to support consideration of travel choices and the increased use of travel options for all trips

- *Objective 4.1* – Continue a regional collaborative marketing campaign to increase awareness of travel options and reduce drive-alone trips.
- *Objective 4.2* – Develop and enhance traveler information tools.
- *Objective 4.3* – Provide technical services to local partners to help implement and support the RTO mission.

KEY QUESTIONS

- What performance measures should be used to track performance relative to new goals?
- How should the evaluation framework be modified to respond to a changing urban and suburban landscape and emerging opportunities?

WHAT WE HEARD

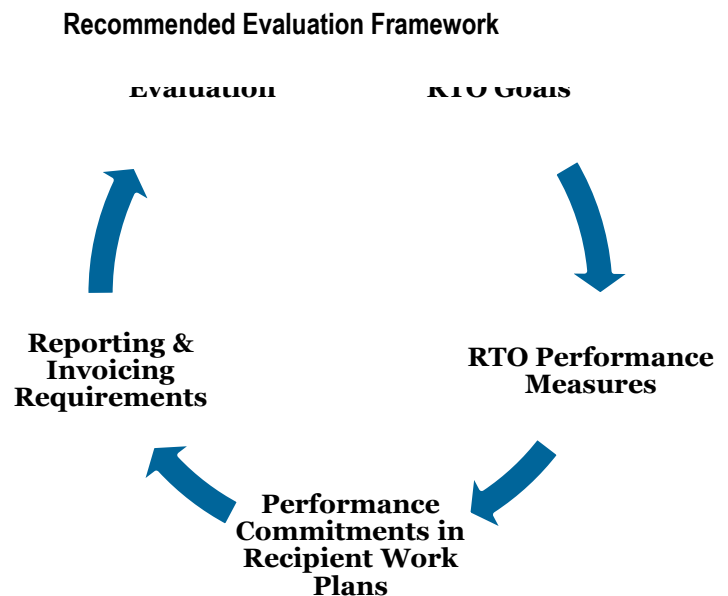
- Stakeholders expressed a concern that evaluation requirements are overly burdensome, consume a disproportionate share of project resources, and could be streamlined without sacrificing the objectives of the evaluation process.
- Singular VMR target and return on investment methodology skews performance measurement.

OPPORTUNITIES

- While some RTO-funded programs face specific challenges, many RTO investments have become national models for implementing innovative travel demand management (TDM) practices. There is an opportunity to continue developing the evaluation process to provide even better TDM services to the region.
- There is an opportunity for the RTO program to become a leader at Metro by defining its contribution to the regional goals. Through adaptation of the existing evaluation framework, the evaluation process can support a triple-bottom-line evaluation framework.

RECOMMENDATIONS

- Align level of evaluation and reporting effort with funding level and program type (see table below).
- Express RTO goals through evaluation criteria, RTO recipients' work plans, invoice and reporting requirements, and two-year evaluations.
- Internalize VMR reporting, placing fewer burdens on grant recipients, particularly those receiving smaller funding allocations.
- Focus on evaluation over longer time periods, recognizing mode shift requires education and outreach that may not translate immediately to quantitative measures such as VMR.



Recommended Reporting Requirements

Funding Level	Reporting Requirements	Notes
\$ 0 - \$20,000	Outputs	Recipients of small grants should not be required to report on outcomes, only outputs.
\$20,000 – \$100,000	Outputs, Awareness, and Participation	Recipients of medium-sized grants should be expected to conduct more rigorous evaluation, stopping short of estimating outcomes.
\$100,000 +	Outputs, Awareness, Participation, Satisfaction, and Outcomes (where appropriate)	Recipients of large grants should be required to conduct even more rigorous evaluation including when appropriate estimates of direct and indirect impacts on the relevant performance measures.



KEY QUESTIONS

- What roles and functions should Metro and its partners play in delivering regional RTO programs?
- What functional changes are needed to respond to emerging transportation technologies, trends, and opportunities?

WHAT WE HEARD

- Overlapping roles dilute the effectiveness of individual actors. This is especially true for TMAs, who compete with TriMet, Metro, and others to deliver employer-focused programming.
- Stakeholders – including funded partners and private sector representatives – feel that employer outreach should be done by Metro’s partners and that Metro should play a wholesale role in support of local delivery.
- The effectiveness of the RTO Subcommittee is reduced because of its conflicting roles as both a funding decision-making entity and a collaborative forum.
- Regional collaboration is important in the delivery of services.

OPPORTUNITIES

- More clearly defined roles for Metro and other regional actors can improve the efficiency of the RTO program by reducing redundancy.
- Separating the RTO subcommittee funding allocation and advisory functions has potential to improve both the decision-making and collaborative processes.

RECOMMENDATIONS

- Focus Metro staff resources to focus on policy development, partner support, and funding allocation:
 - Support local jurisdictions, TMAs, and other organizations that promote travel options;
 - Serve as a regional liaison to share best practices and develop regional policy that supports travel options; and
 - Provide technical services to support local partners (mapping, website, surveys, etc.).
- TMAs, local jurisdictions, and TriMet and other transit agencies lead direct outreach at the local and regional levels with technical and funding support from Metro.
- Divide RTO subcommittee roles; funding decisions should be separated from RTO committee policy advisory and collaborative functions.

The table below outlines the recommended RTO-funded roles and responsibilities for Metro and its regional partners.

Recommended Roles & Actors for RTO-Funded Programs

	Policy	Technical Services & Local Capacity Building	Program Development	Regional Marketing	Employer Outreach	Rideshare	Awareness
Metro	✓	✓	✓	✓			✓
ODOT				✓			
Local Jurisdictions			✓		✓		
Transit Agencies					✓	✓	✓
TMA's					✓		✓
Non-Profits							✓



KEY QUESTIONS

- Given the issues and opportunities on the horizon, how should funding be prioritized during the next 5-year planning period?
- What organizational, policy, and institutional framework is needed to deliver the desired outcomes?
- What specific changes need to be made to the existing policy for public private partnerships (TMAs)?

WHAT WE HEARD

- Funding availability will continue to be constrained by the on-going economic recession.
- The RTO program – like many other regional programs – faces the conflicting objectives of providing for regional equity while also demonstrating performance.
- TMA performance was variable during the 2010-2011 evaluation period. Not all TMAs achieved private sector support as originally envisioned when the Public Private Partnership policy was enacted (see table below).
- TMA booster funding is serving more of a formula funding function than the intended performance-based function.

TMA Detailed Evaluation, 2010-2011

TMA	Local Funding Support ¹	# of Surveyed Worksites	# of Worksites also Working w/ TriMet	# of ECO-Eligible Workers	Metro Investment	Annual VMR (Low)	Annual VMR (High)
Gresham	N/A	7	7	1,537	\$103,318	300,411	450,616
Lloyd District	High	68	8	12,017	\$78,318	1,537,708	2,306,561
South Waterfront	Medium	n/a	n/a	n/a	\$33,081	n/a	n/a
Swan Island	Low	12	8	2,334	\$103,318	VMT Increased	VMT Increased
WTA	Medium	40	23	19,573	\$103,318	2,140,077	3,210,116

¹ High = Metro RTO funds account for 0% - 25% of operating budget

Medium = Metro RTO funds account for 26% - 49% of operating budget

Low = Metro RTO funds account for 50% - 100% of operating budget

² Cost per VMR is based on the Metro RTO investment only; it does not take into account other local funding streams

OPPORTUNITIES

- Provide a streamlined funding structure to ensure limited funding is dedicated to effective investments while providing flexibility to build capacity in a context that best responds to local conditions in Centers, corridors, and local jurisdictions.
- Increase the proportion of funding available for grants by clarifying roles, reducing redundancy, and improving effectiveness.

RECOMMENDATIONS

- Combine TMA, individualized marketing, and RTO Grants program funding; emphasize the need for local support, a problem statement, and a proven business model or complementary funding streams (see diagram below).
- Establish formula funding for employer outreach with specific performance requirements.
- Reduce Metro's total administrative budget for RTO and direct proportionally more funding toward local grants.
- Eliminate TMA-specific funding and shift TMA program administration funding to support RTO grant recipients with technical services.

Recommended RTO Program Funding Structure

