

Metro | Agenda

Meeting: **RTO SUBCOMMITTEE OF TPAC ****
Date: **Wednesday, January 11, 2012**
Time: **3:00 p.m. – 5:00 p.m.**
Place: **Room 270, 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 December 2011 Meeting
 [APPROVAL REQUESTED]* – Dan Kaempff, Metro
- 3:05 p.m. Citizen Communications
- 3:10 p.m. RTO Strategic Plan Draft Recommendations & Discussion
 [APPROVAL REQUESTED]* –Thomas Brennan, Nelson Nygaard; Dan Kaempff, Metro
- The purpose of this agenda item is to resolve any outstanding issues surrounding the draft 2013-2018 RTO Strategic Plan and to forward a recommendation from the Subcommittee to TPAC for plan adoption.
- 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 or TPAC
Wednesday, December 14, 2011
3 to 5 p.m.
Metro Regional Center, Room 501***

Committee Members Present:

Dan Kaempff - Chair	Metro
Sarah Angell	TMA Representative
Dan Bower	Portland Bureau of Transportation
Adriana Britton	TriMet
Sandra Doubleday	City of Gresham
Susan Drake	Department of Environmental Quality
Adrian Esteban	Community Representative
Derek Hofbauer	Community Representative
Jen Massa	City of Wilsonville SMART
Lori Mastrantonio-Meuser	Clackamas County
Alison Wiley	Oregon Department of Transportation
Aisha Willits	Washington County

Committee Members Excused:

Jennifer Campos	City of Vancouver
Len Smith	Oregon Department of Energy

Metro Staff:

Mary Ann Aschenbrenner	Metro
Pamela Blackhorse	Metro
Katie Edlin	Metro
Ted Leybold	Metro
Lake McTighe	Metro
Pam Peck	Metro
Deena Platman	Metro
Caleb Winter	Metro

Guests (signed in or verbally identified):

Lenny Anderson	Swan Island TMA
Brie Becker	Nelson Nygaard
Tom Brennan	Nelson Nygaard
Pete Collins	SWCR
Dave Eatwell	West Columbia Gorge Chamber of Commerce
Ross Peterson	Nelson Nygaard
Jessica Roberts	Alta Planning
Audrey Shuffield	VPSI
Pam Wilson	TriMet

I. CALL TO ORDER/DECLARATION OF QUORUM/INTRODUCTIONS

Chair Kaempff declared a quorum and called the meeting to order at 3:00 p.m.

II. MEETING SUMMARY FROM NOVEMBER 2011 MEETING

Chair Kaempff asked if there were any changes to the meeting Summary for November 9, 2011(included with this record). There being none, Ms. Doubleday moved to approve the meeting summary. Mr. Hofbauer seconded the motion. The meeting summary for November 9, 2011 was approved unanimously. There were no abstentions.

III. CITIZEN COMMUNICATIONS

There was none.

IV. RTO STRATEGIC PLAN DRAFT RECOMMENDATIONS & DISCUSSION

Chair Kaempff introduced Mr. Brennan of Nelson Nygaard and reminded the Subcommittee that they were building on the draft mission statement and goals presented at the November meeting. He pointed out that the purpose of today's meeting was to gather input and feedback from the Subcommittee and identify the next steps needed before Plan adoption.

Chair Kaempff gave a brief overview of the RTO 2012 - 2015 Strategic Plan and the changes outlined by Nelson Nygaard. He stated that they would not be taking action on the draft plan today, but encouraged the Subcommittee to share their comments. He stated that the draft would be completed in January 2012 and sent to the Joint Policy Advisory Committee on Transportation (JPACT), the Transportation Policy Advisory Committee (TPAC) and the Metro Council by mid-year. Additionally, he cautioned that 2012 would be a transitional year in terms of funding and would be discussed further at future meetings.

Chair Kaempff encouraged the Transportation Management Associations (TMAs) attending to address the Subcommittee with comments directly. Additionally, he encouraged the Subcommittee to provide their input about the four key elements as they were presented; those being the mission goals and objectives, evaluation, roles and actors, and funding prioritization.

Mr. Brennan provided a handout (included with this record) and stated that they had captured the opportunities and recommendations as presented by partners and stakeholders. He pointed out two key questions that were raised during stakeholder interviews; namely, what outcomes should the RTO program strive to achieve and how the RTO program could closely align with other Metro programs and investments. He pointed out the opportunities that would link the RTO with other Metro programs by articulating goals that reflect and build on the goals already determined by the Regional Transportation Plan (RTP). Additionally, he pointed out that using vehicle miles reduced (VMR) as a sole performance target resulted in missed opportunities that would normally be demonstrated as a regional contribution.

Further, Mr. Brennan pointed out that the RTO program was already well developed and would help RTO play a leadership role in performance-based planning. He recommended that they adopt a new mission statement and new performance targets that aligned with the triple-bottom-line. Mr. Brennan stressed the importance of infrastructure and roadway operations cost savings, as well as the integration of measures into existing evaluation methodology.

The Subcommittee suggested that the current draft mission statement was more program goal rather than a Subcommittee related and questioned if the purpose of the Subcommittee was to allocate funding. They asked what the triple-bottom-line would be and asked for clarification on social benefits in terms of equity or social justice. Further, the TMAs stated that there was a failure within the Subcommittee structure to elevate transportation demand management (TDM) up the priorities of JPACT and TPAC.

Chair Kaempff responded that RTO and Subcommittee was a coordinated effort to develop a regional program they all agreed upon. The Subcommittee asked if they could review the mission statements of JPACT and TPAC and see if they were consistent with their program ideas. Ms. Peck pointed out that RTO currently had a mission statement and, as this was the third revision of the RTO Strategic Plan the mission statement should be consistent with the RTP. Finally, the Subcommittee stated that they were having difficulties deciding what priorities and projects should be funded and suggested that those priorities be better defined.

Mr. Brennan discussed the evaluation piece and reviewed the key questions surrounding performance tracking in relation to new goals and how the modified evaluation framework would fit the changing landscape. He pointed out that stakeholders felt that evaluation requirements were overly burdensome or disproportionate, and that the VMR target had a singular focus and return on investment, which skewed the performance measures. He stated that some programs may not yield results for several years, so quantitative results would not be ready within the one-year time frame.

Mr. Brennan suggested aligning these elements with the different grant funding levels and program type. He stated that RTO goals should be expressed through the evaluation criteria, recipient work plans, and invoice and reporting requirements based on a two-year evaluation. Further, he recommended that the process be internalized and that Metro consider funding longer term projects. Finally, he recommended utilizing an evaluation that focused on mode shift, education and outreach over a longer period of time.

The Subcommittee suggested providing grants that did not require VMR. Chair Kaempff stated that they could adjust the funding levels once the plan was adopted. The Subcommittee stated that they would still look at the expected outcomes, but that evaluation criteria should be directly tied to the triple-bottom-line approach. Additionally, they felt that the tiered approach was more realistic and suggested moving the ceiling of the bottom tier up. Finally, they stated that there should be a better distinction between the grantor's comments and actions.

Mr. Brennan called their attention to the roles and actors in the Plan, including partners, stakeholders and Metro staff. He stated that there was a need for functional changes and acknowledged that there was overlap to some of the functions currently implemented that conflicted with TMAs and TriMet. Additionally, he stated that employer outreach should be taken on by partners and that Metro should be a wholesaler. Mr. Brennan suggested that Metro release some of these functions to partners in order to put together a leaner program.

Mr. Brennan recommended that Metro focus on policy development, partner support and funding allocation. He suggested that partners and local jurisdictions direct and lead local outreach within the region, coupled with funding and technical support from Metro. Further, he suggested that they separate the Subcommittee roles into funding decision making, and committee policy advisory and collaborative functions.

The Subcommittee responded by using an example of map upgrades and technical support and questioned who would fund these types support. Mr. Brennan acknowledged that there may be a need for a competitive process for this and the allocation of internal staff time. Logistically, they may need to consolidate funds and provide a limited allocation for this. Chair Kaempff responded that they need to develop the logistics for that type of funding allocation and pointed out that implementing a two-year grant cycles would help. The Subcommittee stated that this type of partner support would need further clarification as the process moves forward.

Additionally, The Subcommittee questioned who would administer the Vanpool or Drive Less, Save More (DLSM) Programs. Mr. Brennan reminded them that Metro would shed its direct outreach function and that Oregon Department of Transportation had taken over DLSM already and pointed out that vanpools would most likely go to TriMet. Pam Wilson from TriMet said that they were considering the vanpool program. Mr. Brennan stated that TMA's would likely gain a higher level of employer outreach and that the new funding structure would also look at overlap between TriMet and the TMA's.

The Subcommittee expressed concern for areas that did not have access to TMAs or transit. They suggested that TriMet may need to deliver a full suite of programs and questioned how that would affect Metro and TriMet roles. Additionally, they pointed out that employers in rural areas expected a relationship with TriMet and that outreach would become increasingly important to help target and define locations with good potential.

Further, they suggested developing language for the Plan that reinforced first contact for handling outlying areas. They stated that TMAs were necessary for employer programs that did not have TMA contact and questioned what roles Metro and TriMet should have.

Chair Kaempff responded that the responsibility for funding distribution for employer outreach lay with TriMet and that Metro was the funding coordinator. He stated that TriMet and Metro were in opposition of leadership and would need to be cautious. He pointed out TriMet would deliver programs and Metro would deliver policy.

The Subcommittee questioned whether TriMet should be running hands-on employer programs and if there would be enough funding for that level of service. Mr. Brennan responded that TMAs would handle this type of outreach if there were a TMA available for or within a specific area. He stated that if a TMA was not available, a local jurisdiction could go after funding to meet employer transit and transportation needs. The Subcommittee suggested that they would need to do a better job of coordinating how local jurisdictions, TriMet and TMAs would work together to meet employer needs.

Mr. Peterson questioned how best to define roles for each piece. He stated that they would need to be explicit about what roles TriMet would play and how best to avoid overlap. He suggested that Metro develop a Work Plan that defined these roles and allowed for a certain level of overlap.

The Subcommittee questioned whether TriMet should have a role in working with other forms of transportation. Further, they expressed concern about selling active transportation and questioned how TMAs would maintain their business through employers if TriMet took this element from them.

Ms. Britton replied that TriMet concentrated primarily on transit, but that they also discussed travel options that aligned with regional transit districts. Mr. Brennan recommended an expanded set of expectations in the draft Plan for this.

Mr. Leybold suggested a task force in which members of TPAC and stake holders would handle funding. The Subcommittee expressed some concern about developing a new committee, but Mr. Brennan pointed out that a task force would cover a broad geographic allocation. However, he stated that TPAC alone should make the final funding recommendations.

Mr. Brennan summarized the funding prioritization. He stated that 41% of total funds stayed within RTO, whereas 11% went to TMAs and small grants. He recommending that funding for TMAs, small grants and individualized marketing (IM) be combined into a single pot, which would allow for more funding for a single competitive grant program. TMAs could then apply for multiple individual grants for multiple programs, while formula funding for transit agencies remained in place for employer outreach.

The Subcommittee stated that the TMAs were concerned about the removal of performance based funding and felt that it would jeopardize existing TMAs. They stated that it would be difficult to get new programs off the ground without it. Mr. Brennan acknowledged their concern, but pointed out that TMAs were innovative when it came to funds. Additionally, he stated that the Plan would not open up the funding to every program, but would focus on primarily on TDM and employer outreach.

The Subcommittee felt that base funding would be helpful to TMAs in lieu of booster grants. They suggested a smaller base amount be set aside for TMAs only, which would be secure and separate from competitive funding. Further, they suggested competing for additional funding as needed.

Mr. Brennan stated that the TMA structure could survive primarily on business support, but acknowledged that that was not always available to TMAs. Additionally, he pointed out that if a TMA were not performing, then that TMA was not necessarily viable and should not depend solely on Metro for funding support. Mr. Brennan questioned what would happen when other groups came forward wanting to create a TMA and pointed out that the funding pot would not increase to meet that demand. He suggested that TMA funding expectations for Metro money needed to change.

Chair Kaempff stated that TMAs needed to demonstrate that they could be viable in order to receive funding. Further, he pointed out that this strategy would work if it stayed stable during the two-year funding cycle. He acknowledged that each TMA was different for each area and suggested that levels of funding should support those areas or programs that are viable or have the potential to be viable. Additionally, he recommended that they consider appropriate areas for TMAs where employer membership would be supported.

Chair Kaempff encouraged that Subcommittee to submit additional comments to him by the first week of January. He stated that they would revisit the Strategic Plan during the January 11, 2012 meeting, which is when they would need agreement for the Strategic Plan. The Plan would then go to TPAC, JPACT and the Metro Council by mid-year 2012.

V. ADJOURN

There being no further business, Chair Kaempff adjourned the meeting at 5:13 p.m.

Meeting packet materials:

Document Type	Date	Description	Document Nbr.
Agenda	121411	Agenda, December 14, 2011	121411-rto01
Summary	121411	Meeting Summary, November 9, 2011	121411-rto02
Document	121411	Strategic Plan Mission, Goals & Objectives	121411-rto03

Meeting summary respectfully submitted by,

Pamela Blackhorse

December 14, 2011



Date: January 5, 2012
To: Regional Travel Options Subcommittee and Interested Parties
Cc:
From: Dan Kaempff, Chair
Re: **2013-2018 RTO Strategic Plan**

At the December 14, 2011 RTO Subcommittee meeting, Nelson\Nygaard presented the initial draft 2013-2018 RTO Strategic Plan. Following the meeting, a number of questions were raised which revolve around the larger question of transitioning from the current 2008-2013 RTO Strategic Plan to the consultant's structure recommended in the draft plan. This memo is intended to further clarify certain draft plan elements and provide a framework for discussion at the January 11, 2012 Subcommittee meeting.

The scope of work for this strategic planning process consists of three main tasks:

1. Review and recommend changes to the existing Transportation Management Association funding policy
2. Review and recommend changes to the existing RTO program measurement and evaluation criteria
3. Lead a planning process and draft a new five-year RTO Strategic Plan

The draft plan encompasses all three of those tasks. It reflects the guidance and input received from stakeholders, including RTO Subcommittee members. It attempts to build on the strengths of the existing program, while addressing areas of concern raised by local stakeholders and better aligning the program's efforts with regional planning and policy "Triple Bottom Line" goals of Economy, Environment and Equity.

The feedback received at the Subcommittee meeting was that, in general, the Subcommittee supports the draft plan's mission, goals and objectives. In addition, agreement was reached on the purpose of the plan:

The purpose of this strategic plan is to define a mission, a set of goals and objectives, and a 5-year plan to support 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 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 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*

So while at a high level, the Subcommittee supports the draft plan, the need was identified for greater clarification of certain aspects of it. This memo attempts to address that need by providing greater detail on what the consultant's recommended strategic plan would look like when fully enacted. It is recognized that the strategic plan will by definition, not include a high level of detail regarding the tactical elements of the program. Upon adoption of a new strategic plan, regardless of its final form and content, there will be further planning work required of regional partners to determine how to best implement the new plan structure. Primary among these tasks will be:

- RTO Grant criteria for consolidated grant program
- Establishment a grant decision-making process with TPAC
- Development of program performance and evaluation metrics
- Further definition and refinement of partner roles and responsibilities

Draft Implementation

The matrix below shows key RTO program elements, consultant recommendations in the draft RTO Strategic Plan and proposed next steps and a timeline for implementing plan recommendations in upcoming years.

RTO Program Element	Consultant Recommendation	FY12/13	FY13/15
Metro administration and coordination	<ul style="list-style-type: none"> -Focus on policy development, partner support and funding allocation -Coordinate Regional Mobility program and integrate TDM into projects -Stakeholders said Metro should play a “wholesale” role in support of local delivery 	<ul style="list-style-type: none"> -Eliminate “retail” role by discontinuing direct-to-consumer marketing, outreach and services via events, customer service, employer outreach -Build local jurisdictions’ capacity to develop and deliver projects and programs -Increase policy development efforts -Continue convening regional partners, coordinating joint regional marketing efforts, allocating funding, providing tech support, evaluation training and administration for Drive Less Connect 	(same)
Employer program	<ul style="list-style-type: none"> -TMAs, local jurisdictions, TriMet and other transit agencies lead direct outreach -TriMet in lead role, SMART in Wilsonville; formula funds with specific performance requirements -TriMet administer Drive Less Connect (DLC) and Vanpool program 	<ul style="list-style-type: none"> -TMAs, TriMet and SMART continue to provide employer outreach -Metro RTO discontinues employer outreach -Increase scope for TriMet (will not administer DLC and Vanpool) -Discontinue vanpool program 	-TriMet and SMART lead and coordinate employer outreach and reduce or address overlap with other partners
Grants <ul style="list-style-type: none"> • TMA • RTO • IM 	<ul style="list-style-type: none"> -Link to regional goals, align with triple-bottom line outcomes, scale evaluation requirements to funding level -Streamline, clarify roles, reduce redundancy and increase effectiveness -Combine funds (TMA, individualized marketing, RTO grants and reduce Metro’s RTO admin) - Emphasize the need for local support, a problem statement and a proven business model or complementary funding streams 	<ul style="list-style-type: none"> - 1 year TMA funding (current policy) - 1 year IM project(s) - Develop grant program and process 	- Projects emerge from one competitive grant process

RTO Subcommittee	-Restructure Subcommittee to separate funding decisions from policy advisory and collaborative functions	-Merge Marketing and Outreach Working Group and Subcommittee into regional working group as collaborative function to streamline, leverage efforts across the region -Create new committee comprised of TPAC members and regional leaders to create policy recommendations and recommend funding for RTO and Regional Mobility programs	(same)
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Public Private Partnership (TMA) Policy Recommendation

Based on feedback received so far, there is much concern regarding the recommended change from dedicated funding for TMAs, to a unified grant program. From the draft strategic plan:

“The most significant change is the recommended elimination of TMA-specific funding. It is recommended that TMAs continue to be eligible for funding, but this funding should be channeled through the new consolidated competitive grant program.¹ 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.”

The origins of the existing TMA policy date back to the late 1990s. At that time, TMAs were an emerging strategy in the TDM toolbox. They were envisioned as a means for business to work with government to solve commonly agreed-upon transportation problems in a relatively small geographical area. At the time, businesses – primarily those in suburban areas – were dealing with problems of access to their worksites. They needed employees but were often not able to hire people due to not being located near transit or having other transportation needs. Also, the State Legislature’s recently enacted Employee Commute Options (ECO) rule required many businesses to enact transportation programs aimed at reducing drive-alone trips to the worksite to improve air quality. TMAs were envisioned as a way to help businesses comply with those rules.

The regional TMA funding policy was originally developed around the vision of being able to assist local private and public partners address these problems as a means of increasing trips by non-drive alone modes in regional centers. Regional funding was seen as part of a multi-part funding strategy, with local jurisdictions and private business being equal partners. The policy was subsequently refined to give TMAs flexibility in how much funding they needed and what level of reporting and measurement they agreed to undertake.

Since the TMA policy was originally enacted by Metro Council, much has changed. Businesses no longer compete for employees as they did in the late 1990s. The ECO rules were relaxed (originally employers

¹ 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.

with more than 50 employees were affected; now employers with more than 100 employees are affected). The level of envisioned local and private sector support has not materialized evenly across the region. A number of TMAs folded, due to difficulties engaging businesses around a common problem.

In addition, certain policy elements have proven to be a disadvantage for TMAs. The funding amounts and the types of eligible projects under the policy do not fully take into consideration the differences between TMAs, but are rather a “one size fits all” structure. Currently, funding is not available for formation of or sustaining new TMAs. In 2008, RTO fully implemented the performance-based funding structure from a 2002 policy update. RTO hears many complaints from TMAs on performance and reporting requirements as being overly cumbersome and time-consuming. Nelson\Nygaard and PSU evaluations cite difficulty understanding some TMA performance when it comes to measuring outcomes.

It’s important to note that since the creation of the TMA policy, the RTO Grant program was created to fund projects not being performed by TMAs, TriMet or SMART. Other non-profits that do similar work in the region, such as the Bicycle Transportation Alliance or Community Cycling Center, have emerged as valuable RTO partners, yet do not have similar dedicated funding set-asides.

So while the draft plan recommends eliminating a dedicated portion of funding for TMAs, it does so to level the playing field and increase accountability of funded partners to ensure performance in return for RTO investments. In doing so, it also creates the opportunity through the development of grant funding criteria to continue supporting TMAs in a way that better reflects their unique contributions to the RTO program (i.e. moving beyond a VMR-centric model toward a triple-bottom line model), and reduces many of the obstacles created by the existing policy. The new plan will better clarify roles to avoid overlap between partners’ efforts, and will eliminate Metro’s role in providing employer outreach. These changes will further clarify the role TMAs play in the region. Finally, a greater percentage of RTO funding will be channeled into the grant program. \$1.25 to \$1.50 million is anticipated to be available in future grant cycles. That creates the opportunity for larger project amounts, but also creates the necessity for greater levels of funding stewardship and policy rigor.

Next Steps & Timeline

Once the Subcommittee has completed its discussion on the plan, their recommendations will be forwarded to TPAC for their discussion and approval. It is desirable to forward a consensus decision to TPAC so if the Subcommittee feels that more time is needed in order to resolve outstanding issues and reach consensus, additional Subcommittee meetings can be scheduled.

With that in mind, the following timeline is flexible and the dates subject to change:

- (Completed, November 9) – RTO Subcommittee heard Nelson\Nygaard present initial mission, goals and recommendations. RTO subcommittee members agreed to discuss recommendations with their respective organizations
- (Completed, December 7) – Draft plan was sent to RTO subcommittee members for review. Materials are available for viewing/downloading at <ftp://ftp.oregonmetro.gov/pub/tran/rto/>
- (Completed, December 14) – Nelson\Nygaard presented draft plan and RTO subcommittee shared initial feedback on plan and recommendations, including mission,

goals, objectives, evaluation, roles & actors, funding prioritization, next steps and transition

- December 14 to January 11 – RTO subcommittee and interested parties share comments, revisions and feedback on draft plan. Additional comments due by January 6
- January 11 – RTO Subcommittee meeting – Clarify and discuss outstanding issues. RTO Subcommittee will make recommendations to be submitted to TPAC. (Note: reaching a consensus on recommendations forwarded to TPAC is desirable, but not necessary.)
- January 27 or February 17 - Draft presented to TPAC (informational item only)
- February 9 or March 8 – Draft presented to JPACT (informational item only)
- February 15 to March 15 – Open comment period. Metro will alert interested parties about the comment period through email and web updates
- March 19-23 – Metro summarizes feedback from comment period. Comment summary to accompany draft plan to TPAC
- March 30 – TPAC recommendation (action)
- April 12 – JPACT (action)
- April – Metro Council (action). Plan is approved and adopted

NOTE: TPAC, JPACT and Council meeting dates are subject to change.

Questions/Clarification for 2012-17 Strategic Plan Metro RTO

Respectfully Submitted by Enterprise Rideshare

Recommended Goals and Objections, Goal 3, Objective 3.3, page 20:

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

- **Objective 3.3 – Address employer needs in transit underserved areas.**

What are RTO's views regarding Rideshare/Vanpooling fulfilling this need?

Clarification of Roles, Figure 8, page 24: Regional Vanpool Staff position

Has RTO considered how they will handle the management of the vanpool program?

Will it be funneled through Metro? TMA? Or the vendors?

Appendix A, Interview Summary, Part 1: Mission and Desired Outcomes, What is the Metro RTO Program Vision, page A-1:

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*

Please clarify RTO's response to the interviewees perception of the program's vision and as it relates to Vanpooling? Also, please clarify the "softer side".

Figure A-1, page A-7:

Regarding this section, under the "Last mile connection, Not Important Column" there are no responses. Please explain why.

Figure A-1, page A-7:

Regarding this section, under the "Vanpool, Carpool programs, Not Important Column," it seems the Business and Suburban community have expressed a need for transit options, specifically mentioning a need for vanpool programs and Metro's support of it. What are RTO's thoughts on this perception and how they could help change it in downtown Portland?

Appendix A, Interview Summary, Part 3: Synthesis, page A-8:

– 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.

Based on the division in the report, it seems there is a disconnect between downtown Portland, Metro, Tri-Met and the outlying counties (Clackamas and Washington). What steps are RTO taking to address this gap?

Questions/Clarification for 2012-17 Strategic Plan Metro RTO

Respectfully Submitted by Enterprise Rideshare

Appendix A, Interview Summary, Part 7, Business Feedback, page A-13:

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*

What steps are RTO taking to address the underserved Tri-Met areas?

Appendix A, Interview Summary, Part 7, Business Feedback, page A-14:

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*

Based on the report, it seems there is a clear request from businesses to have some level of Vanpool involvement. Has this yet been considered by Metro? If so, what have been the discussions regarding this involvement?

Appendix A, Interview Summary, Part 7, Business meeting summary, page A-15:

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.

Has RTO considered ways to bridge the gap between Portland downtown and high-tech, high employment density of the Hillsboro area.

With businesses requesting more attention from Metro for Vanpool, possible changes to the program, and with Drive Less Connect having vanpool as an option, does RTO anticipate a revision of any of these options?

-----Original message-----

From: "Dreyfus, Kate" <Kate.Dreyfus@greshamoregon.gov>
To: Daniel Kaempff <Daniel.Kaempff@oregonmetro.gov>
Cc: "Kelly, Katherine" <Katherine.Kelly@greshamoregon.gov>, "Doubleday, Sandra" <Sandra.Doubleday@greshamoregon.gov>
Sent: Fri, Dec 23, 2011 19:40:21 GMT+00:00
Subject: Gresham Staff Comments on RTO Strategic Plan Draft

Dear RTO Strategic Plan Review Staff:

Thank you for the opportunity to comment on the 2012-2017 RTO Strategic Plan Draft. Katherine Kelly, Sandy Doubleday and I look forward to review of the second iteration.

We have the following questions and comments on the Strategic Plan Draft and Appendix D to that Draft. Please note that some of these documents were made available for review on December 7th, and due to limited resources we have had little time to review in detail. Accordingly, these comments are preliminary. We look forward to providing additional comments at the January 11, 2012 RTO Subcommittee Meeting, where the Committee will take action on the Plan. At this time, our comments are focused on two of the documents in the Strategic Plan packet; the Strategic Plan Draft and Appendix D.

2012-2017 Strategic Plan Draft

1. RTO Program Funding Structure

- Page 20 – Please clarify the recommended funding model, and amend text and Figure 6 to explain the proposed funding structure. The following recommendation is made for your consideration. The purpose is to put all funding items on the same plane and break them out with elements listed underneath.

2012-2017 RTO Program Funding Structure

	<i>Local Competitive</i>	<i>Formula</i>
<i>Metro</i>	<i>Travel Options Grant</i>	<i>Funding</i>
30 to 35%	45 -50 %	15-20%
RTO Functions:	Grant Consolidation:	Employee
Outreach:		
• Administration	TMA	TriMet
• Technical Services	Small grants	Smart
• Capacity Building	Individualized Marketing Grants	
• Policy Development		
• Evaluation		

The recommended funding structure is not spelled out in the text of the Draft Plan. The reader is referred to Figure 6 for specifics but this graphic is not clear. For instance, there are some funding percentage numbers in the figure but it is not clear what the percentages refer to.

2. Focus on RTO staff roles

- Page 21 – we recommend adding “**and maintain**” support to last paragraph 3rd sentence to read:

*Metro staff should dedicate a percentage of time providing direct outreach to local political leaders and local staff to build **and maintain** support and capacity for TDM implementation at the local level.*

3. Metro Staff Roles, Responsibilities and Budget

On page 23, Figure 8 – the “Recommended Metro RTO Staff Roles, Responsibilities and Budget” shows some changes that are not clearly linked to the Draft Plan’s recommendations. For instance,

- If the intent is to transfer some of the funds cut from the Employer Outreach program to TriMet, then why is this not reflected in the draft?
- If the DLSP campaign has been transferred to ODOT, and Metro’s role is shifting from “that of campaign manager to that of advisory partner,” draft page 8, then why is there no corresponding decrease in either the funding or responsibilities listed under “Marketing and Communication?”
- What is the reasoning for the proposed elimination of all Metro staff funding for management of the Regional Van Pool, and what is the proposal for any future staffing for the Van Pool?
- We notice that there is an overall decrease in the personal services budget of \$134,741. Please clarify how funding is reallocated in the new model.

We recommend adding a third column to show where the funding goes if other than to Metro. The report should include a line item breakout of all funding (in addition to percentages) of both the current program and the proposed program, for all three categories, so that readers can get a clear picture of what is proposed.

Under Grant Administration missing bullets for currently existing functions:

- Approve project scopes, contracts, and invoices
- Federal reporting

Explain Materials and services only under Technical Services Budget. Is there no grant funding for these types of services?

If the multi-modal trip tracker and rideshare matching services are now administered by the State of Oregon? Is there any need for oversight from TriMet or would this be redundant?

TriMet would work to conduct outreach to employers along with TMAs. Further define the benefit of this vs. TMAs having first contact with employers.

4. Performance measures.

The Draft Plan recommends that RTO programs be measured by more than just VMR. We agree. Much of the discussion of performance measures is in the earlier sections of the Plan. Can more discussion of the proposed performance measures be incorporated into the “Evaluation and Performance Measures” section, page 26?

5. Shift in funding decisions from RTO Subcommittee to other entities:

We suggest more discussion on whether the RTO Subcommittee, TPAC, or another entity should make funding decisions on competitive grant applications. We would appreciate a further analysis of the “pros” and “cons” of the funding decision process and issues. We agree a new filter comprised of both recipients and non-recipients, and representatives of the entire region, be convened.

It would be too cumbersome for TPAC to serve as the initial review body. TPAC would need additional support to evaluate, summarize, and potentially rank applications. In the event that a body other than the current RTO Subcommittee is providing this first level analysis, we recommend that any entity conducting this “first level” review should not be purely Metro Staff.

Appendix D

We have the following comments on Figure 24: City of Gresham Bike/Ped Wayfinding Evaluation, 2010-2011:

Please change all references to “annual report” to “final report.”

We would appreciate your editing of the “Actual Accomplishments” column in Figure 24 to reflect some of Gresham’s activities.

Modal share shift: since the signs were installed during the project period, it was not possible to determine if we had increased bicycling, walking and transit use during the contract period. Gresham staff and volunteers partner to conduct annual bicycle and pedestrian counts, and can use these counts as a “proxy” to determine percentage reductions.

Survey distribution: Since the survey was available on line, it is not possible to determine how many surveys were “distributed.” However, the survey was accessed and completed by 67 Gresham residents on line. The survey was advertized through the August 2010 *Neighborhood Connections* Newsletter. The survey was also marketed at the Transportation Fair on September 25, 2010 to about 300 participants and the City received 38 completed surveys at the fair.

Media placement: Media stories ran in the *Gresham Outlook* on May 15, 2010 and May 26, 2010 before and after the Way to Go Fair on May 19, 2010 and online in *OregonLive.com* on May 28, 2010 after the sign unveiling ceremony on May 21, 2010. Events were also publicized in the May 21, 2010 and June 16, 2010 issues of Gresham’s *Neighborhood Connections* newsletter. An article on a series of “Gresham Smart Trips” events ran in the *Oregonian* on August 7, 2010. These articles were submitted to Metro as part of the final billing packet submitted but were not specifically mentioned in the final report.

Increase awareness of the “Drive Less. Save More.” marketing campaign: The campaign was mentioned and promoted through the Bicycle Guide. The Guide included the Drive Less. Save More logo and website address, and also included a section titled “Travel Options” that provided information on multi-modal options and directed readers to visit the website “Drive Less. Save More.” at www.driveless.savemore.com. Gresham also distributed informational handouts from “Drive Less. Save More” at the Way to Go! Fair in May and the Transportation

Fair in September. An insert about Bike Month was included in the March/April 2010 Gresham utility bill and contained the "Drive Less. Save More." Logo and web address.

Increase awareness of existing pedestrian, bicycle, and transit facilities: Please edit the text in the Accomplishments column to correct some small numerical discrepancies: 113 signs were installed and 10,000 Bicycle Guides were printed. Five thousand of these Bike Guides have been distributed to date.

The Gresham Bicycle Safety Equipment and Bicycle Rack Project is the Gresham Regional Center TMA Project. The TMA recently completed the installation of Bike Racks in the Downtown area. A final report will follow shortly.

Thank you for this opportunity to comment.

Katherine Kelly, Sandra Doubleday, and Kate Dreyfus

From: WILEY Alison J [<mailto:Alison.J.WILEY@odot.state.or.us>]
Sent: Thursday, December 29, 2011 15:38
To: Daniel Kaempff
Subject: Feedback on RTO's drafted strategic plan

Dan,

I have some feedback to offer on the drafted strategic plan. I think the report and drafted strategic plan have many strengths. I especially like NN's idea of RTO aligning itself more deeply with Metro's overarching goals and hence becoming a stronger, more powerful player within Metro.

I question, though, the drafted plan's idea for how RTO would distribute its funding in the proposed new path. I believe that if funding was distributed simply on the basis of problem-solution statements and discreet proposals/programs, RTO could lose what it has spent many years building. Let me explain.

Proposals and programs would surely need to capitalize on existing relationships with employers – but those relationships have been built by the TMA's. In the real world, as opposed to on paper, those **relationships aren't transferable to a newcomer who has written a good-looking proposal that makes the right promises**. Relationships are owned by the people who have invested in them over time.

My experience is that travel options are primarily about building relationships with employers – who may or may not perceive they have any transportation problems at a given time. When employers --- businesses -- eventually believe they have a transportation problem (\$4 gas being one triggering event) they look to someone with whom they have an existing relationship for a solution. Someone like their local TMA. If the TMA suddenly seems wobbly, uncertain of its own survival, the business loses trust in the TMA. Businesses don't want wobbly. They want firm solutions once they think they have a problem – from people they already know, who work in their neighborhood, rather than 'strangers' with new proposals. Businesses are conservative. They're won't be impressed by a new proposal or program on account of RTO funding it and sending it into their area. That's why I don't think the drafted model of discreet proposals and programs would serve RTO's interests. We need consistent, ongoing relationships with employers. The TMA's that have been fostering those for years.

We talked at our last RTO meeting about TriMet possibly doing more of RTO's work. TriMet is good at what they do – promoting transit ridership – but they have no financial reason to actively promote modes like ridesharing and a free tool like Drive Less Connect. At most, they may mention those things to travelers for whom transit isn't an option. But that's not true TO advocacy. In my understanding, **it's not in TriMet's business model to visit and serve the many employers who aren't on a transit line. But it is in the TMA business model to visit and serve those employers.**

I do think it may be wise to craft some changes with the TMA's. For example, the WTA (which I'm the most familiar with) has a staff of two, and is expected to influence the travel behavior of Washington County, which at [530,000](#) is the second most populous

county in Oregon, has no paid parking, and is deeply car-centric. If we expect the WTA to measurably influence its enormous market's travel behavior, we'd need to increase their funding and staffing.

I recommend not going forward with the drafted plan for funding distribution. I suggest we extend the strategic plan time frame to arrive at a better way of distributing funding. I'd like, for example, to be part of an in-depth discussion on how the TMA's -- which RTO has invested a great deal in -- could better serve RTO's goals.

Best,
Alison

Alison Wiley
Transportation Options Program Manager
Oregon Dept. of Transportation
555 13th St NE, Suite 3
Salem, OR 97301
(503) 986-4131
alison.j.wiley@odot.state.or.us
Drive Less Connect
'If you want to go fast, go alone. If you want to go far, go together.'
– African proverb



CITY OF
PORTLAND
BUREAU OF
TRANSPORTATION



Sam
Adams
Mayor

Tom
Miller
Director

Date: January 6, 2012
To: Dan Kaempff, RTO Chair
From: Dan Bower, Transportation Options - Division Manager
RE: RTO Strategic Plan

The purpose of this memo is to provide feedback from the City of Portland on Metro's proposed five year strategic plan for the Regional Travel Options (RTO) program. While the overall direction and refinements in the plan provide specific improvements over the past five year plan, there are several elements that should be addressed before finalizing the proposals and moving forward.

The City's comments are specific to three RTO functions: The proposed committee structure and Metro's role within that structure, the City's role as a leader in TDM programming in the region, and the proposed public/private partnership policy.

Committee Structure

First, the City supports the plan's proposed restructure of the RTO committee. We agree with the consultant's recommendation of separating funding decisions from the people that directly benefit from the decisions. The current structure creates a situation where a few partners are forced to vocally defend their own programs, which detracts from RTO's larger strategic goals and a cohesive committee working towards regional issues.

However, there needs to be more clarity on what "RTO" means to all parties. The plan defines RTO as both a Metro TDM program with staff, and a "semi-centralized partnership model." Our feeling is that we need to be clear about Metro's role moving forward; either Metro is a partner in delivering TDM programming in the region, or it is a takes more of a leadership role in convening TDM partners, distributing funds and administering the grants. In the proposed plan Metro participates in both functions, and our feeling is this creates some confusion around the RTO committee table when Metro is both the convener and the deliverer of programs.

Either way, as both a direct recipient and distributor of funding Metro should play a more active role in the decision-making process either by making stronger, more defensible staff recommendations on difficult decisions or by more actively participating in the conversations that occur around the table. Metro acting as a neutral convener by presenting information and letting the committee discuss and decide the outcome has not worked well; the committee does not have the ability to make difficult decisions, it needs leadership. That leadership can come from Metro, or the committee should consider appointing its own chair to help steer conversations.

The Role of the City of Portland

We find the plan largely silent on the City of Portland's role as provider of and partner in TDM services delivered in the region; this is perhaps due to the fact that the plan addresses those things that are funded with CMAQ dollars. A TDM plan for the Portland region that does not explicitly outline the role of, and support for, the largest TDM provider in North America is a large omission, in our opinion.

The City developed and runs many of the programs the proposed plan suggests Metro offer expertise in moving forward such as: individualized marketing programs for households, employers and new residents, evaluation of programs, Sunday Parkways, bike and walk maps, Safe Routes to School, and employer programs that have been replicated at every regional TMA.

The City also provides free consultation to other RTO partners and organizations throughout North America on TDM program and services. We have created detailed how-to manuals for many of these programs (with some Metro funding), provided free trainings to all RTO partners, provided considerable resources to our partners in the form of tens of thousands of free TDM materials annually, and City representatives sit on the board of every TMA in the city - and we do all this at little or no cost to the region.

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In fiscal year 2011/12 there are zero CMAQ funds going toward the largest TDM program in the country?! The City's investment in TDM over the past decade is un-unprecedented in North America, and the increases in bicycle and transit ridership and public support for TDM is due, in great part, to our programs. PBOT is cutting \$16,000,000 from its budget this year and the Transportation Options division is by no means immune to these cuts.

The most important thing for the City's Transportation Options division right now is stability. The division cannot continue to offer our assistance to TDM partners at the current rate without a commitment of CMAQ funds that allows for stability and predictability in this environment. Formula funding for a partner that has been doing the work and delivering results for over a decade should be on the table during this discussion, especially with other formula funded partners charging RTO partners for the use their materials and other RTO partners directly benefiting by using the expertise, graphics, artwork, logos, materials, and experience of the City to deliver RTO funded programs (SmartTrips, Sunday Parkways); these programmatic elements were developed at considerable cost to the City over the years.

We appreciate the intent of the plan's proposal to increase the grant pool, and to some degree we feel this could potentially benefit the City as our programs tend to compete well for funding. However, there is some degree of inequity in making the City of Portland compete with every potential provider of RTO services across the region when we have demonstrated a clear and consistent commitment to developing and delivering the TDM programs and projects called for in the RTO plan for over a decade now.

Public/Private Partnerships

Transportation Management Associations (TMA's) play a vital role in delivering TDM service, however it's clear that TMAs are not the best answer for delivering TDM services across the entire region. TMAs work well in some areas and situations, and in those cases it makes sense to use CMAQ funds to support them.

However, TMAs should not be the only vehicle for implementing TDM across our region where cities or counties have failed to step up to meet Metro's policy direction. If Metro is indeed successful in being the policy engine the strategic plan proposes, then local jurisdictions should be held more accountable for their lack of investment in the strategy and incentives should be provided for those that implement the policies.

The City's feeling is Metro is right to assert that its role is that of a *partner* in supporting TMAs, not *in charge* of TMAs. However, as a partner, there needs to be a commitment to funding the TMAs that are delivering on the partnership; making the TMAs seek grants every year is not a good way to demonstrate a commitment to a partnership. Similarly, as a funding partner, Metro needs to be willing to take a less of oversight role of the day to day activities of TMAs and reduce the burden of paperwork, billings, and evaluation. Making TMAs connect every dollar to a VMR is not a productive use of time and resources.

That said, when TMAs are not functioning, it's the RTO committee, not Metro, that has the responsibility to hold TMAs, and all programs, accountable for results. We do not support Metro being held hostage as the lifeline for TMAs that have failed to meet their obligations in the partnership. The committee, and by extension, Metro should have the ability to walk away from partnerships when it's clear that not all parties are delivering on promised commitments. Metro has, and will continue to act in accordance with the authority granted by the committee members, and to that end it's important that the committee operate in a more functional manner when it comes to allocating scarce resources.

The City sees many improvements in the proposed five year plan and believes that RTO can continue to function as a strong central component of the region's TDM system. The plan presents Metro and RTO with a unique opportunity to build upon the successes of the past and leverage ever-dwindling financial resources to support regional goals. The City looks forward to continuing to work with Metro and RTO to make the region a great place to live and work.

Phone call log:

12/15/2011 – Pete Collins at South Waterfront Community Relations (TMA) voiced general support for the strategic plan but has reservations about the direction and funding allocations.

12/22/2011 – President Hughes received concerned phone calls about the direction for TMA funding. One call was from the Hillsboro Chamber of Commerce. Concerns were the loss of guaranteed funding and that the comment period was short.

1/3/2012 –

- Call from Alison Wiley at ODOT
- Call from Pete Collins at South Waterfront Community Relations

1/5/2012 – Call from Kate Dreyfus at City of Gresham was interested in seeing more budget detail for other RTO partners/programs, particularly TriMet.

From: Massa Smith, Jen [<mailto:massa@ridesmart.com>]
Sent: Thursday, December 08, 2011 11:22
To: Daniel Kaempff
Subject: RE: Addtl. Materials - December 14, 2011 RTO Subcommittee of TPAC

Hi Dan,

I will bring my comments to the meeting, but one I'd like to point out now is that the amount of annual funding that SMART receives is very off. They have our annual 'core program' funding listed as double what it actually is. SMART's annual piece of the RTO pie has historically been about \$65,000 per year, not \$126,000. I think they must have pulled that amount that was at one time listed in the RTO budget for two years?

See you next week,
Jen

Hi Dan,

Unfortunately, I won't be able to attend the next subcommittee meeting, but I thought you might want to know that there is a typo on page 10 of the recommended 2012 - 2017 Strategic Plan. The Kaiser-funded program is called "Vamanos!" in the report, but it should be "¡Vámonos!" (note accent, two exclamation points, and different spelling). It's a little thing, but I think it's important to make partners in equity efforts feel that we are taking care to communicate accurately.

Best,
Jessica

Jessica Roberts
Programs Manager
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From: Lenny Anderson [<mailto:sitma@teleport.com>]
Sent: Thursday, December 15, 2011 9:31 AM
To: Daniel Kaempff
Cc: sarah angell; Caleb Winter
Subject: Swan Island TMA...how we're doing

Dan, (please forward to Tom, et.al.N/N as well)

From the chart in the draft Strategic Plan update under Funding Prioritization, it looks like the Swan Island TMA is the sick child of the TMA family.

We sure don't feel that way. In the last two years we have:

- Provided employees at employers with hundreds of transit and bike trip plans thru our individualized marketing effort, Going to the Island.
- Worked with two major employers, Vigor Industrial and UPS that have initiated transit pass programs; UPS charges their employees \$22/month, pretax.
- Helped Daimler Trucks NA almost reach the Top Ten of the Bike Commute Challenge, logging over 18K miles (3rd highest in region) as well as placing 3rd in the New Riders column
- Had the Swan Island Evening Shuttle service noted as the most highly rated JARC project in the most recent grant round.
- Have \$5M worth of bike/ped, transit access projects under construction or in design.
- Oversaw the completion of the \$5M seismic retrofit of the Going Street Bridge with a wider bike/ped facility.

The Swan Island TMA's annual budget is approx. \$200K, with Metro's contribution just over 25%; granted, for staff operations the percentage is closer to 50%, but for that we put 1.5 FTEs to work. In the coming year contracts with ODOT and City of Portland will dilute Metro's share of our operations budget.

ECO data is still incomplete for the last two years and is frankly too small data set for meaningful evaluation. UPS's baseline survey is still at DEQ; our largest employer, Daimler Trucks NA...Portland's largest industrial employer...has no ECO requirement, though we have some base line data from Going to the Island. That said, VMT may well have gone up...its been a nasty couple of years down here with hundreds of layoffs. At the start of 2009, the 85 Swan Island bus carried over 500 riders per day; a year later that number was under 350. We are slowing recovering both jobs and ridership. Add to that the departure of Fed Ex Ground's 500 employees (thanks to the Port of Portland) where non-drive alone commutes were in the 30%+ range, and our numbers are not great. But sure not for lack of effort.

Not sure how this adds to your planning effort, but better said than left to fester.

Lenny

Lenny Anderson
Executive Director
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Dan Kaempff
Chair, Regional Transportation Options Subcommittee
600 NE Grand Avenue
Portland, OR 97232

January 6, 2012

Dear Mr. Kaempff,

South Waterfront Community Relations (SWCR) appreciates the opportunity to add recommendations to the Draft 2012-2017 Metro Regional Travel Options (RTO) Strategic Plan. As the most recent Transportation Management Association (TMA) under RTO, SWCR is supportive of the broader goals and objectives of the Draft Strategic Plan, however, disagrees with the timeline of action, funding allocations, and affected populations.

SWCR is asking Metro to:

- **Increase the timeframe for the Strategic Plan process**
 - Provide at least one additional RTO Subcommittee meeting prior to presenting the Strategic Plan to TPAC.
 - This will achieve the following:
 - Successful incorporation of RTO partner feedback into the final plan
 - A conversation at the RTO Subcommittee around TMAs' role in the region
- **Identify reliable funding for ALL transportation options**
 - SWCR works in partnership with TriMet and is grateful for the TriMet operated transportation options within the district, however, with a diversifying demographic and a largely residential population, *all* modes of transportation options need to be encouraged and supported.
 - The Strategic Plan should identify reliable funding to support local initiatives that encourage *all* transportation options through *established TMA boundaries*.
 - This will achieve the following:
 - A more holistic, regional approach to improve livability throughout the Metro region
 - Yield a higher reduction in VMTs for all population bases
 - Provide equitable support to all persons in the region
- **Allocate funds for Residential populations**
 - Transportation Management Associations should encourage *residents* as well as employers/employees to reduce VMTs. Transit agencies only focus on employers/employees. South Waterfront Community Relations has the unique ability to increase awareness and trip reduction to all patrons within their boundaries through local initiatives.

Thank you for your time and consideration,

Pete Collins
Executive Director

South Waterfront Community Relations

Dan Kaempff
Chair, Regional Transportation Options Subcommittee
600 NE Grand Avenue
Portland, OR 97232

January 5, 2012

Dear Mr. Kaempff,

The regional Transportation Management Associations (TMA) appreciate the opportunity the *2012--2017 Metro Regional Travel Options (RTO) Strategic Plan* (Strategic Plan) provides to improve the planning and governance of RTO programs and the distribution of federal Congestion Mitigation Air Quality (CMAQ) funds. The five regional TMAs play an integral role in promoting RTO programs at a local level. The relationships TMAs build within the community bring private sector partners and investments to the efforts of achieving publically-established goals of green house gas and vehicle trip reduction. By collaborating with local employer partners, TMAs provide specialized transportation options programs that respond to the particular needs of each business.

While the TMAs are generally supportive of the goals and objectives laid out in the draft Strategic Plan, we do not believe the current funding recommendations reflect the true value of TMAs or are a logical extension of these goals. The five regional TMAs are asking Metro to:

Formalize the role TMAs

The Strategic Plan should clearly define the role each RTO partner plays in promoting employer transportation options programs. Over the past fifteen years, TMAs have brought the value of public/private collaboration to the efforts of vehicle trip reduction. TMAs harness local knowledge, partnerships and experience to promote the non-SOV options best suited to the unique needs of each service area. The RTO Subcommittee needs to clarify the importance of TMAs to RTO efforts.

Support local RTO initiatives

TMAs use local relationships to leverage federal CMAQ funds with private dollars and provide a cost-effective method of impacting local trip modes. TMAs' unique role in the community enables them to stretch federal dollars to deliver on-the-ground multi-modal programs specific to the needs of each business. Funding recommendations need to reflect the cost-effective manner in which TMAs utilize and *optimize* CMAQ funds.

Provide formula funding to TMAs

The Strategic Plan's draft funding model recommends that secure formula funding for transit agencies to provide employer outreach programs be increased while recommending that secure formula funding for TMAs to provide multi-modal programs be entirely eliminated. As RTO partners that provide multi-modal employer outreach programs, TMAs should receive formula funding that reflects the value of a multi-modal approach. This ensures that all transportation option modes are supported by federal dollars and that local as well as regional initiatives are supported by the RTO program.

We are asking that an additional RTO Subcommittee meeting be held to discuss these recommendations prior to the Strategic Plan being presented to TPAC. We appreciate your attention to the above recommendations and look forward to working with you and the RTO Subcommittee to address each of them in the final Strategic Plan.

Thank you for your time and consideration,

Lenny Anderson
Executive Director
Swan Island Business Assoc.

Pete Collins
Executive Director
South Waterfront TMA

Heather McCarey
Executive Director
Westside Transportation Alliance

Sarah Angell
Program Director
Swan Island TMA

Jeff Edinger
Executive Director
Gresham TMA

Rick Williams
Executive Director
Lloyd TMA

cc: Rex Burkholder
Kathryn Harrington
Tom Hughes
Ted Leybold
RTO Subcommittee of TPAC

Dan Kaempff
Chair, Regional Transportation Options Subcommittee
600 NE Grand Avenue
Portland, OR 97232

January 5, 2012

Dear Mr. Kaempff,

The *2012-2017 Metro Regional Travel Options (RTO) Strategic Plan* (Strategic Plan) provides a significant opportunity to review the regional distribution of Federal Congestion Mitigation and Air Quality (CMAQ) funding and to ensure these funds are used in an effective and equitable manner. A theme from the Strategic Plan's consultant's stakeholder interviews was the on-going support of local communities to define and meet trip reduction targets and the equitable distribution of regional funds. These are goals that the Westside Transportation Alliance and our partners in Washington County want to see achieved.

The Westside Transportation Alliance (WTA) is the only organization that is solely devoted to promoting travel options in Washington County. The WTA Board and stakeholders are invested in the RTO strategic planning process to ensure it reflects the unique needs of a large, economically dynamic, suburban county that is home to over 241,700 employees and over 530,000 residents. While the WTA is generally supportive of the RTO's draft goals, we do not feel that the current funding recommendations are a logical extension of those goals, nor do we feel that the draft Strategic Plan adequately addresses the urban/suburban divide or the long-term needs of Washington County. The current funding recommendations threaten the WTA's long-term fiscal viability. With this in mind, we are asking Metro to:

- **Increase the timeframe for the Strategic Plan process**
 - Provide at least one additional RTO Subcommittee meeting prior to presenting the Strategic Plan to TPAC.
 - This will achieve the following:
 - Successful incorporation of RTO partner feedback into the final plan
 - A conversation at the RTO Subcommittee regarding urban/suburban funding priorities and needs
 - A conversation at the RTO Subcommittee around TMAs' role in the region
- **Allocate funds at a local level**
 - As the employer outreach provider solely dedicated to Washington County, the WTA should receive adequate and stable funding to build the local capacity within Washington County that will support TriMet and Metro's implementation of their regional transit and transportation option objectives.
 - In addition, a percentage of the competitive grant funds should be appropriated to Washington County based on employee population. Projects funded with this money must address Washington County's unique transportation options needs and circumstances.
 - This will achieve the following:
 - Equitable geographic allocations of funds
 - Effective use of funds to address local and sub-regional community needs
 - Achievement of the draft Strategic Plan's goal of supporting local partners (Goal 3)
- **Identify reliable funding for all transportation options**
 - The WTA and business stakeholders want to ensure the success of TriMet in Washington County but acknowledge that existing transit alone cannot serve the needs of many of the County's employees.

- The Strategic Plan should identify reliable funding to support local initiatives that encourage the transportation option that fits local employers' needs and circumstances.
- This will achieve the following:
 - An acknowledgement of the urban/suburban differences in both funding and transportation option needs identified in the stakeholder interviews
 - Give equal weight to a full range of mode options (including vanpool, car sharing, transit, walking and bicycling) to meet the needs of a suburban county.

We appreciate your attention to the above recommendations and look forward to hearing how each of them is addressed in the final Strategic Plan.

Thank you for your time and consideration,

Heather McCarey
Executive Director
Westside Transportation Alliance

Westside Transportation Alliance Board

Commissioner Dick Schouten
Washington County, District 1
WTA Board Chair

Dr. Phil Wu
Physician, Kaiser Permanente
WTA Board Secretary

Steve Silver
WTA Board Treasurer

Adam Argo


Andrew Singelakis
Director of Land Use and Transportation
Washington County

Bryan Trotter
Health, Safety, and Environmental
Manager
SolarWorld Industries America

Darren Wyss
Senior Planner
City of Tigard

cc: Rex Burkholder
Kathryn Harrington
Tom Hughes
Ted Leybold
RTO Subcommittee of TPAC

Washington County Supporters



Dennis Doyle, Mayor
City of Beaverton

Chairman Andy Duyck
Washington County Board of Commissioners

Deanna Palm
President
Hillsboro Chamber of Commerce



Bob Scott, President
Board of Directors
Tualatin Hills Park & Recreation District



TriMet Feedback for Metro Five-Year Strategic Plan Draft

TriMet supports Metro's efforts in assessing the results and goals of the RTO program. We endorse the direction of the RTO Five-year Strategic Plan to better align the program's mission with the regional vision and the greater emphasis on performance measures. It is critical we use funds as efficiently as possible and focus on return on investment.

TriMet's draft work plan for 2013 incorporates direction from the draft RTO plan and we are prepared to adjust our efforts to meet the goals of the final RTO plan.

Here is our initial feedback on the plan. The RTO process is dynamic and we look forward to discussing it with others.

Mission – link to Metro's Making a Great Place and goals

An aspirational mission that connects with the "big picture" clearly defines the overall benefit of the RTO program as it relates to the region's livability. Goals that align with the RTP objectives will better position RTO as an effective regional program.

Coordination and Addressing Duplication

- TriMet is uniquely qualified and positioned to market and manage TDM programs in the region as it provides free employer-focused programming throughout the metro area and at the local level. Our staff coordinates with TMAs and RTO partners to deliver the TDM services that will address a local employer's situation. TriMet relies on maintaining contact with the employers we serve that generally expect to have a relationship with TriMet. Our staff's in-depth knowledge of transportation resources is of great benefit when enrolling local and regional employers in transportation programs.
- We are optimistic that concerns about overlapping roles in employer outreach can be addressed with more clearly defined projects and targeted goals among the partners, such as TMAs, as well as improved coordination.

Formalization of formula funding for the TriMet employer outreach program

- With current staffing last year, TriMet made 5,465 contacts with 1,659 employers and colleges across the Metro region. TriMet's employer outreach staff works with employers and colleges of all sizes. TriMet offers experienced staff dedicated to focus on three distinct geographic areas to offer solutions tailored to the employer's situation. TriMet staff currently assists employers with transportation programs and education about using all non-SOV commute options such as transit, carpooling, vanpooling, biking, walking, compressed workweeks, telecommuting and incentives. We leverage ongoing as well as new relationships to meet our goals.
- It would be helpful to further clarify how the formula funding will be formalized. Specific, measurable performance outcomes are essential. We presume that by formalizing the funding, the program could still maintain flexibility to adjust our services as needed to serve the region.

For example, we are serving a section of Clackamas County previously served by the North Clackamas TMA. Formula funding and being a regional provider allows us the capacity to do so.

- The Nelson Nygaard report recommended that TriMet offer individualized marketing programs. We are open to a discussion about individualized marketing projects. TriMet could offer individualized marketing with an increase in staffing and grant funding. However, individual marketing may be an effective project for a TMA with grant funding and we suggest first clarifying target areas that could be well-served by individualized marketing projects.

Consolidation of TMA, small grant and individualized marketing grant pool

- The consolidation of the above projects could allow flexibility of operating a TMA as a nimble performance-based catalyst for meeting the very real travel option needs in a local community or geographic area. Once a project is complete or the goal is accomplished, the TMA could then shift to another community need. While grant criteria is still being developed, it is our understanding that the guidelines could have the potential to improve grant opportunities for RTO partners.

Performance metrics and changing singular focus on VMR results

- We support the proposed move toward triple-bottom line metrics that can be applied to RTO program projects and tasks. In recent subcommittee discussions last summer about measuring results, TriMet requested whether Metro could supply a set of results related to projects and tasks that could be applied across the RTO programs.
- We recommend continuing use of VMR as one measurement plus support dividing it into maintenance VMR and new VMR in addition to expanding measurements to include desired outcomes such as economic benefits and healthy communities. As we seek to change behaviors and mode splits, other indicators, such as awareness and satisfaction, are useful in determining results and performance. The CMAQ guidelines indicate VMR as a performance measure for programs but the guidelines also provide flexibility for tailoring CMAQ programs to local requirements. The mode split data that TriMet currently captures in our ECO surveys could be supplied to Metro.
- TriMet's draft plan for 2013 includes a set of quantifiable performance measures for our outreach activities in addition to ECO surveys. TriMet captures our outreach activities in a customized database and we supply this information each quarter to Metro and we are prepared to make adjustments and changes based on the goals and priorities in the final RTO plan.

Outreach to employers in transit-underserved areas

- By way of example, in the current year, we will be working with partners to target employers located in the underserved areas such as in industrial area previously served by the former North Clackamas TMA. Like we do with all employers, we will be promoting all modes of transportation to meet their needs.
- Our staff promotes multiple transportation choices to fit the needs of the worksite or college campus. We are currently promoting Drive Less Connect tool among employers and colleges. Plus, staff has been using TriMet's multi-modal Regional Trip Planner tools in our employer outreach since the beta was released in October. We'll continue these efforts and we have included proposed performance goals in our draft plan for 2013.

Administration of the vanpool and Drive Less Connect programs

- As you know, TriMet has researched these options but decided not to take on the administration of these programs. We consider ourselves part of the marketing team to enroll Drive Less Connect, along with other travel options, to employers and colleges.

Some of the questions on the table we presume will be clarified as the grant process is developed.

The RTO program is critical to the livability of this region. We welcome the opportunity to continue to work with our partners to produce a performance-based strategic plan that aligns with our region's goals and mission.



January 9, 2012

Dan Kaempff
Chair, Regional Transportation Options Subcommittee
600 NE Grand Avenue
Portland, OR 97232

RE: 2012-2017 Metro Regional Travel Options (RTO) Strategic Plan

Dear Mr. Kaempff,

Thank you for the opportunity to comment on the Draft Metro RTO 2012-2017 Strategic Plan. As a local Transportation Demand Management (TDM) agent, and a recipient of RTO funding, the Gresham TMA has an interest in the outcome of the Strategic Plan. While there are many excellent recommendations in the Draft Strategic Plan, there are elements of the Plan that could negatively affect both the Gresham TMA's operations and the availability of transportation options for residents, visitors, and businesses in Gresham.

The Draft Strategic Plan addresses some shortfalls of current RTO programs and makes valuable recommendations to strengthen the programs. The Gresham TMA particularly supports the following elements of the "Recommended Strategic Plan" section:

- 1) "Objective 1" Integrating the RTO program more effectively with other Metro programs. Building relationships with other regional programs and partners will strengthen Metro's ability to achieve RTO goals.
- 2) Evaluation & Performance Measures and Contracted Reporting Requirements – Scaling the evaluation and performance measures with the levels of funding awarded by the RTO subcommittee will allow better use of resources while still providing meaningful accountability.

Despite these useful recommendations, there are several issues of concern regarding the Strategic Plan.

First and most importantly, we have concerns about the appropriateness of the shift of TMAs to the competitive grant pool. TMAs provide the unique role of leveraging private sector investment to achieve RTO goals, often in key regional centers. We join other TMAs in requesting that RTO consider including formula funding at a base level for TMAs, along with the funding for TriMet.

Second, because of the proposed shift in the way TMAs are to be funded, we are concerned with the lack of clarity about the grant awarding process. There is little or vague information about applicant eligibility guidelines, clear goals for the use of the grant funds, and selection criteria for grant proposals. For example, the "Recommended Goals and Objectives" in the "Recommended Strategic Plan" for the RTO program seem to be relevant only to Metro RTO staff activity. The goals and objectives that guide the grant process and the formula funding are unclear. Under "Consolidation of Competitive Grants" the document indicates only that "the current selection criteria" should serve as a starting point. Given that 65% of RTO funding is to flow to competitive grants and formula funding, the goals and objectives for the work performed should be as clearly spelled out as those that account for the 35% allocated to RTO staff. Without these elements, it is very difficult to understand the changes that we and other TMAs will have to make in order to compete for the competitive grant pool. If these elements are expected to be developed later by RTO staff, it would be helpful to outline a process by which they will be shaped.



In our efforts to reduce single-occupancy vehicles (SOV) miles traveled within the East County Region, we have teamed with the City of Gresham as both a strategic partner and as a program recipient of our individualized marketing program. Through our combined efforts and our work with the City we have made great progress towards meeting our goals of SOV reductions and have educated a significant number of local businesses and residents of the benefits of using non-SOV trip modes. The City of Gresham shares our concerns that a level of formula funding is necessary for TMAs and that there needs to be significantly more clarity regarding the procedures that dictate the way competitive grants will be awarded.

We appreciate your consideration and time and look forward to working together towards a Strategic Plan that addresses the challenges we all face in reducing single-occupancy vehicle miles traveled in our region.

Sincerely,

A handwritten signature in black ink, appearing to read "Jeff Edinger". The signature is fluid and cursive, with the first and last names being more prominent.

Jeff Edinger
Executive Director

Cc: Katherine Kelly
City of Gresham Transportation Planning Manager