

# Metro | Agenda

Meeting: Metro Council  
Date: Thursday, May 24, 2012  
Time: 2 p.m.  
Place: Metro, Council Chamber

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## CALL TO ORDER AND ROLL CALL

1. INTRODUCTIONS
2. CITIZEN COMMUNICATION
3. CONSIDERATION OF THE MINUTES FOR MAY 17, 2012
4. CONTRACT REVIEW BOARD
- 4.1 **Resolution No. 12-4351**, For the Purpose of Approving a Contract Amendment for Geotechnical Services on the New Elephant Habitat Project at the Oregon Zoo. **Craddick**
5. ORDINANCES – SECOND READING
- 5.1 **Ordinance No. 12-1275**, For the Purpose of Amending Metro Code Section 2.12 Regarding the Office of Citizen Involvement and Metro Code Section 2.19.100 Regarding the Metro Committee for Citizen Involvement. **Harrington**
- Public Hearing*
- 5.2 **Ordinance No. 12-1278**, For the Purpose of Amending the Regional Transportation Functional Plan to Remove the Schedule for Updating City and County Transportation System Plans; to Add an Exemption Process; and to Revise Procedures for Extensions and Exceptions. **Collette**
- Public Hearing*
6. Resolutions
- 6.1 **Resolution No. 12-4349**, For the Purpose of Adopting the Regional Travel Options 2012-2017 Strategic Plan. **Burkholder**
7. CHIEF OPERATING OFFICER COMMUNICATION
8. COUNCILOR COMMUNICATION

## ADJOURN

**EXECUTIVE SESSION HELD PURSUANT WITH ORS 192.660 (2)(e). DELIBERATIONS WITH PERSONS DESIGNATED BY THE GOVERNING BODY TO NEGOTIATE REAL PROPERTY TRANSACTIONS.**

**Television schedule for May 24, 2012 Metro Council meeting**

<p><b>Clackamas, Multnomah and Washington counties, and Vancouver, WA</b>  Channel 30 – Community Access Network  <i>Web site:</i> <a href="http://www.tvctv.org">www.tvctv.org</a>  <i>Ph:</i> 503-629-8534  <i>Date:</i> Thursday, May 24</p>	<p><b>Portland</b>  Channel 30 – Portland Community Media  <i>Web site:</i> <a href="http://www.pcmtv.org">www.pcmtv.org</a>  <i>Ph:</i> 503-288-1515  <i>Date:</i> Sunday, May 27, 7:30 p.m.  <i>Date:</i> Monday, May 28, 9 a.m.</p>
<p><b>Gresham</b>  Channel 30 - MCTV  <i>Web site:</i> <a href="http://www.metroeast.org">www.metroeast.org</a>  <i>Ph:</i> 503-491-7636  <i>Date:</i> Monday, May 28, 2 p.m.</p>	<p><b>Washington County</b>  Channel 30– TVC TV  <i>Web site:</i> <a href="http://www.tvctv.org">www.tvctv.org</a>  <i>Ph:</i> 503-629-8534  <i>Date:</i> Saturday, May 26, 11 p.m.  <i>Date:</i> Sunday, May 27, 11 p.m.  <i>Date:</i> Tuesday, May 29, 6 a.m.  <i>Date:</i> Wednesday, May 30, 4 p.m.</p>
<p><b>Oregon City, Gladstone</b>  Channel 28 – Willamette Falls Television  <i>Web site:</i> <a href="http://www.wftvmedia.org/">http://www.wftvmedia.org/</a>  <i>Ph:</i> 503-650-0275  Call or visit web site for program times.</p>	<p><b>West Linn</b>  Channel 30 – Willamette Falls Television  <i>Web site:</i> <a href="http://www.wftvmedia.org/">http://www.wftvmedia.org/</a>  <i>Ph:</i> 503-650-0275  Call or visit web site for program times.</p>

**PLEASE NOTE: Show times are tentative and in some cases the entire meeting may not be shown due to length. Call or check your community access station web site to confirm program times.**

Agenda items may not be considered in the exact order. For questions about the agenda, call the Metro Council Office at 503-797-1540. Public hearings are held on all ordinances second read. Documents for the record must be submitted to the Regional Engagement Coordinator to be included in the decision record. Documents can be submitted by e-mail, fax or mail or in person to the Regional Engagement Coordinator. For additional information about testifying before the Metro Council please go to the Metro web site [www.oregonmetro.gov](http://www.oregonmetro.gov) and click on public comment opportunities. For assistance per the American Disabilities Act (ADA), dial TDD 503-797-1804 or 503-797-1540 (Council Office).

Agenda Item No. 3.0

**Consideration of the Minutes for May 17, 2012**

Metro Council Meeting  
Thursday, May 24, 2012  
Metro, Council Chamber

Agenda Item No. 4.1

**Resolution No. 12-4351**, Resolution of Metro Council, Acting  
as the Metro Contract Review Board, For the Purpose of  
Approving a Contract Amendment for Geotechnical Services on  
the New Elephant Habitat Project at the Oregon Zoo

*Contract Review Board*

Metro Council Meeting  
Thursday, May 24, 2012  
Metro, Council Chamber

BEFORE THE METRO CONTRACT REVIEW BOARD

FOR THE PURPOSE OF APPROVING AN ) RESOLUTION NO. 12-4351  
AMENDMENT TO A CONTRACT FOR )  
GEOTECHNICAL SERVICES FOR THE NEW ) Introduced by Chief Operating Officer Martha  
ELEPHANT HABITAT PROJECT AT THE ) Bennett  
OREGON ZOO )

WHEREAS, on December 19, 2011, Metro entered into a personal services agreement with Shannon & Wilson, Inc. (S&W) in the amount of \$100,000, to provide geotechnical engineering services for the New Elephant Habitat and Related Infrastructure project at the Oregon Zoo; and

WHEREAS, due to unanticipated subsurface conditions requiring further investigation and study, Metro subsequently amended the S&W agreement to obtain additional services under the contract in the amount of \$72,891, for a total current contract value of \$172,891; and

WHEREAS, to pro-actively manage geotechnical risks as the New Elephant Habitat and Related Infrastructure project progresses, more subsurface investigation, lab testing, and design support will be necessary to support the project through completion, and an amendment to the S&W contract will be required, in the amount of \$102,929, as set forth in the attached Exhibit A; and

WHEREAS, pursuant to Metro Code 2.04.046(a), Council approval is required for any amendment to a personal services contract in excess of twice the original contact amount; and

WHEREAS, Metro Code 2.04.046(a) requires the Council to determine whether it is appropriate to amend the contract in light of the polices set forth ORS 279A.015 and ORS 279B.010; and

WHEREAS, the Chief Operating Officer recommends the amendment of the contract for \$102,929 be awarded without additional competitive process in light of the polices set forth ORS 279A.015 and ORS 279B.010, and therefore presents this matter to the Council for approval; now therefore

BE IT RESOLVED, that the Metro Council determines that it is appropriate to amend Metro’s Personal Services Agreement with Shannon & Wilson, Inc. in light of the polices set forth ORS 279A.015 and ORS 279B.010, and the Chief Operating Officer is authorized to execute Amendment No. 3 in the amount of \$102,929, to Contract No. 930986 in a form substantially similar to the attached Exhibit A.

ADOPTED by the Metro Council this \_\_\_\_\_ day of May, 2012.

\_\_\_\_\_  
Tom Hughes, Council President

Approved as to Form:

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Alison Kean Campbell, Metro Attorney

## **STAFF REPORT**

### **IN CONSIDERATION OF RESOLUTION NO. 12-4351, FOR THE PURPOSE OF APPROVING A CONTRACT AMENDMENT FOR GEOTECHNICAL SERVICES ON THE NEW ELEPHANT HABITAT PROJECT AT THE OREGON ZOO**

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Date: May 15, 2012

Prepared by: Craig Stroud  
Jim Mitchell

## **BACKGROUND**

A Request for Proposals was issued in August 2011 for Geotechnical On-Call Services to support upcoming 2008 Zoo Bond projects. Three firms were selected to provide the On-Call Geotechnical Services and Metro entered into separate contracts with each firm. On December 19, 2011, Metro awarded Shannon & Wilson, Inc. (S&W) a personal services contract in the amount of \$100,000 to support the New Elephant Habitat and Related Infrastructure project geotechnical engineering needs. As project site investigation work progressed, the scope of services necessary to inform and finalize the project's schematic design increased to the point that Metro amended the S&W contract by adding additional scopes of work totaling \$72,891, for a current contract value of \$172,891.

The Oregon Zoo is situated on a landslide zone known as the Zoo-Highlands Landslide Complex. Landslide movement has been noted and required mitigation in past construction projects. Construction of the prior OMSI facility (now the Children's Museum) and widening of Highway 26 caused some of the first landslide activity in 1958 and 1959. Mitigation measures to address landslide conditions installed in the vicinity of the zoo from 1959 to 1996 include a vertical drainage gallery, horizontal drains, toe berms, rock buttresses, retaining walls and soldier pile walls. The zoo measures ground movement annually through information gathered from six inclinometers installed around the zoo campus. The multiple mitigating improvements over the past 50 years have dramatically slowed the land movement from 6 inches per year in 1959 to currently .01 inches or less per year.

For the New Elephant Habitat and Related Infrastructure project pre-schematic design, Metro and the design team relied on geotechnical assessments and recommendations from a different geotechnical engineering firm. The scope of that geotechnical work was at a pre-schematic level of effort and did not identify the risks that S&W identified as project designs progressed and specific site borings were performed and analyzed. Much of the project's improvements are sited along the zoo campus perimeter in areas with little prior geotechnical information other than what could be observed on the ground surface. The underlying site conditions are much more challenging than initially expected.

S&W provided a draft report dated March 16, 2012, that documents the extent of ground movement risk for the pre-schematic designs of the New Elephant Habitat and Related Infrastructure project. The report identifies considerable geotechnical risk beyond what was known at the time the project pre-schematic design was approved in mid-2011. The project's cost estimators forecast the project costs to mitigate the geotechnical risk, which resulted in a forecast project cost considerably above the pre-schematic estimate.

In many cases, the cause of current estimates exceeding the pre-schematic estimate were a direct result of the underlying geotechnical conditions that required extensive shoring and retaining walls to address. For example, the pre-schematic elephant habitat included a connecting chute between the north and south habitats with a tunnel underneath the service road. Constructing that chute and tunnel involved an approximately 30 foot deep cut that required expensive drainage, stabilization, and retaining walls in a challenging soil condition. While the construction was feasible, the cost premium to deal with the soil

conditions drove the project and design team to reconsider the program and to identify new solutions that provided the intended elephant connection between habitats, but without the extensive soil cut. The redesigns have resulted in a final schematic design construction estimate that aligns with available project resources.

The analysis and information provided by S&W has been extremely valuable to Metro to pro-actively mitigate geotechnical risk as the design progresses, but the scope of services required far exceeded original estimates for this work at the time the contract was awarded. S&W provided Metro a detailed scope of work estimate to continue subsurface investigation, lab testing, and design support that totals \$102,929. A summary of the scope of services to be performed and related costs is included in Exhibit A of Resolution Number 12-4351.

Bond program staff discussed the geotechnical conditions and S&W scope of additional work to complete the project with the zoo bond steering group to identify options to support the project's geotechnical needs through construction documents. Geotechnical risk is considered the greatest risk facing the project and staff believes proactively mitigating those risks ahead of construction substantially reduces project exposure to unforeseen conditions and associated construction change orders. The group believes it would be impractical and inefficient to conduct a competitive procurement process for the additional scopes of work through design and is in the best interest of Metro to amend the existing agreement with S&W. The project is extremely complex and is approaching major design milestones that necessitate continued geotechnical engineering analysis and recommendations. The time involved to solicit a new Request for Proposals to support the project's remaining geotechnical engineering scopes, as well as the inefficiency of transferring the project knowledge and expertise already gained by S&W to another firm, are the primary justifications to amend the existing contract. Therefore, it is recommended that a contract amendment for \$102,929 be awarded without an additional competitive process. The action requires Metro Contract Review Board approval because the amendment exceeds twice the amount of the original contract.

The current Elephant Schematic Design direct construction estimate, dated April 23, 2012, totals \$39 million and balances to the approved project construction budget resources. The budget includes a 10 percent design contingency, which is a level believed to be reasonable and adequate at this point of design. In addition to the design contingency, the overall project budget is maintaining healthy overall owner's contingency funds. Contingency funds are adequate to support the project's increased geotechnical engineering costs.

#### **ANALYSIS/INFORMATION**

- 1. Known Opposition** None known.
- 2. Legal Antecedents** Metro Code 2.04.046
- 3. Anticipated Effects** Approval of this amendment will authorize Metro to amend the professional services contract with Shannon and Wilson, Inc.
- 4. Budget Impacts** Existing New Elephant Habitat and Related Infrastructure project contingencies are adequate to fund this contract amendment.

#### **RECOMMENDED ACTION**

The Metro Contract Review Board approves Resolution 12-4351.



**Shannon & Wilson, Inc.  
Oregon Zoo - New Elephant Habitat Project  
Metro Contract No. 930986**

**Task 4: Exhibit Slope Stability Analyses, Grading and Wall Geotechnical Recommendations**

Shannon & Wilson, Inc. (S&W) presents this scope of work to address geotechnical issues identified through redesign of the site grading plans and to add exhibit design elements not in prior work tasks. A more inclusive scope and budget that provides the remainder of geotechnical design and construction support tasks will be prepared following this scope. Our specific additional tasks are outlined below and our proposed budget is attached to this letter.

**Task 4.1 Project Meetings**

S&W has attended 4 design team meetings to date and will attend up to 3 more design team meetings to discuss geotechnical elements of the project. We have assumed that 3 hours will be required for each meeting including travel time. We also have assumed 4 hours preparation time to present recommendations as required for certain design topics.

**Task 4.2 Exhibit Slope Stability Evaluation and Geotechnical Wall Design**

S&W provided conceptual and preliminary design engineering support during the value engineering and planning phases to aid in cost estimates. We propose to continue this support during the design phase up to the budget proposed in this amendment of \$51,690 (overall total budget to date of \$195,450). To the budget established, we will provide geotechnical support as needed for the following project elements:

- A. North Meadow Fill evaluation
- B. Proposed Utility Corridor
- C. Proposed Stormwater Retention Facility, Settling Basin, and Wet Well
- D. Ravine Confinement Walls
- E. Excavation Stability
- F. Subdrainage for Meadow Habitats and Ravine
- G. Elephant Ponds and Subdrainage
- H. Train Alignment and Straight Trestle
- I. Optional Loop Trestle
- J. Service Road Fill and Walls
- K. Elephant Building and Forest Hall Foundations and Drainage
- L. Forest Hall Walls
- M. Elephant Fence Supports
- N. Habitat Theater Area
- O. East Hub Building
- P. South Meadow Grading and Drainage

Results will be presented in the appropriate technical memorandums prepared in accordance with Task 2.6 described in our original scope for the site.

Shannon Wilson - Portland Branch

Oregon Zoo New Elephant Habitat - Task 4  
Metro/Oregon Zoo

Attn: Jim Mitchell

April 10, 2012  
Shannon & Wilson, Inc.

TASK	Sr. VP	VP	Sr. Assoc	Assoc	Sr. Ptn. E/G	Ptn. E/G	Sr. E/G	Pro. 1/2	Sr. Tech Srvcs	Tech III/IV	Tech III	Sr. Office Srvcs	Office Srvcs III/IV	Office Srvcs III	TOTAL TASK HOURS	TOTAL LABOR COST	TOTAL TASK DIRECT COSTS	TOTAL TASK AMOUNT
4.1 Project Meetings															59	8025		\$8,025
4.2 Exhibit Slope Stability Eval and Geotech Wall Design	\$2,100				\$540	\$2,025	\$2,700								364	43540	125	\$43,665
	\$5,040				\$12,500	\$16,400	\$4,200			\$3,400								
TOTAL HOURS	34	4	121	184	40	40	40	40	40	40	40	40	40	40	423			\$51,590
AVERAGE HOURLY RATES	\$210	\$190	\$170	\$155	\$135	\$125	\$115	\$105	\$95	\$95	\$85	\$80	\$75	\$58				
TOTAL LABOR ESTIMATE	\$7,140				\$540	\$15,125	\$21,160	\$4,200	\$3,400									\$51,565
DIRECT COSTS (ODC)																		\$125
Travel - Vehicles & Per Diem																		
Office - Reproduction & Software Usages																		
Drilling																		
Traffic Control, Utility Check & Permits																		
Field Equipment Rentals																		
Laboratory Testing																		
																		\$51,565
																		\$51,590

**Shannon & Wilson, Inc.**  
**Oregon Zoo - New Elephant Habitat Project**  
**Metro Contract No. 930986**  
**Task 5: Contract Modifications**

Shannon & Wilson, Inc. (S&W) presents herein scope of work and fee estimates for Task 5 and Task 6 contract modifications to the above referenced Metro Contract. The Task 5 scope expands upon the original design support scope of work dated January 13, 2012, plus additional tasks 2, 3 and 4. Task 5 provides continued design support through final design based upon the newly refined design details developed since January 2012. Additional geotechnical investigations, periodic instrument readings, and final design recommendations for specific project features will be provided. Task 6 provides scope of services and fee estimate for geotechnical support during construction. The specific additional tasks are outlined below.

**Task 5: Additional Explorations, Continued Engineering Analysis, and Design Support**

**Task 5.1 Additional Engineering Design**

S&W has provided geotechnical engineering support during the value engineering and planning phases of design and evaluating alternatives to aid in cost estimates. Those efforts have reduced estimated construction costs in part by reducing the need for substantial geotechnical solutions required in the earlier design. Based on recent discussions with the design team, additional engineering design and site specific design analyses will be required as the project proceeds through final design, plans, specifications, and cost estimating. S&W will provide site specific design recommendations for numerous walls, earthwork, utilities, and site drainage. During this phase, we will support the designers through providing review comments on relevant plans and specifications. We anticipate that these services will be required for the following project elements:

- i. North Meadow Fill
- ii. Proposed Utility Corridors
- iii. Train Alignment including Overcrossing Trestle
- iv. Optional Eastern Loop Trestle
- v. Proposed Stormwater Retention Facility, Settling Basin, and Wet Well
- vi. Ravine Walls and Excavation Stability
- vii. Site Drainage for Meadow Habitats and Ravine
- viii. Elephant Ponds
- ix. Service Road Fills and Walls
- x. Elephant Building and Forest Hall Foundations and Subdrainage
- xi. Forest Hall Cut Walls
- xii. Elephant Fence Supports
- xiii. Habitat Theater Area
- xiv. East Hub Building
- xv. South Meadow Grading and Drainage

S&W has, and will continue, to track the above named features and their design status with the project matrix included with this scope as Attachment A. Based on our understanding of the CM/GC process, we anticipate that the design support will be required through the construction process. The estimated time for design for each element provided within this matrix incorporate both the time included in the previous budget for Task 4, as well as continued design support through construction here in Task 5. This matrix was used to support the Task 5 cost estimate included as (Attachment B).

**Task 5.2 Additional Subsurface Investigation**

S&W proposes three additional borings for ravine slope stability and north meadow fill slope design as well as a day of test pits for the eastern loop trestle design. S&W will plan, coordinate, subcontract, and observe the explorations. Three (3) borings will be drilled to depths up to 80 feet deep, or ten feet into basalt. Test pit explorations will extend to 15 to 20 feet in the area where landslide debris was identified in the eastern train loop area. Inclometers will be installed in all three borings to allow stability monitoring during construction. Borings and test pits will be at locations agreed upon by S&W, the design team, and the Zoo, and will be field surveyed with a hand held GPS unit during the investigation and later surveyed by Westlake Consultants. Explorations will be completed with the assumptions presented and as described in our original exploration scope of work. Test pits will be loosely backfilled with the excavator and may need to be improved during construction based on location and the proposed improvements. Logs and design information will be provided in our updated Geotechnical Data Report for the site.

**Task 5.2 Assumptions:**

- Access to the northern meadow habitat will be with a tracked drill rig through the existing exhibit fences.

**Task 5.3 Additional Laboratory Testing**

S&W will examine samples in the laboratory and perform visual-manual check classifications, geologic characterization, and other index testing on select samples, including moisture content determinations, Atterberg Limits determinations, unit weight, grain size analyses, and one consolidation test.

**Table 1. Proposed Laboratory Testing Program**

Test	ASTM	Quantity
Moisture Content	D2216	20
Atterberg Limits	D4318	2
Grain Size Analysis	D422	2
Unit Weight	D2937	4
Consolidation	D2435	2

**Task 5.4 Piezometer and Inclometer Readings**

S&W will collect piezometer and inclinometer data in the instruments installed for the project three times between May and December 2012.

#### **Task 5.5 Review of Plans and Specifications**

S&W will provide comments and input to the relevant portions of the plans and specifications for the appropriate project elements. We anticipate that this will include the following:

- Train trestle foundations
- Train trestle abutment walls
- Up to two soldier pile walls along the service road
- MSE and Gravity retaining walls as needed
- Utility, Wet Well, and Storm Facility Excavation, Shoring, and Dewatering
- Soil Nail Wall in the Ravine Habitat
- Drainage installations within the North, South, and Ravine Habitats

#### **Task 5.6 Deliverables**

The results of the various investigations and laboratory tests as well as collected piezometer and inclinometer data will be presented in an updated Geotechnical Data Report to serve as a contract reference document for construction. As discussed above, design recommendations will be conveyed in technical design memorandums during the design phase. Once the design is complete, a final design letter will be provided for permitting for the elements discussed above. At the conclusion of the project, S&W will provide a complete package of the design and construction documents prepared for the project. Two paper copies plus electronic files (PDF) will be provided.

SHANNON AND WILSON  
PORTLAND BRANCH

New Elephant Habitat - Task 5  
Oregon Zoo  
24-1-03681-005

Attn: Jim Mitchell

May 13, 2012  
Shannon & Wilson, Inc.  
prepared by

TASK	Sr. VP	VP	Sr. Assoc	Assoc	Sr. Prin. E/G	Prin. E/G	Sr. E/G	Pro. 3 / 4	Sr. Tech Svcs	Tech III/IV	Office Svcs III/IV	Office Svcs I/II	TOTAL HOURS	TOTAL LABOR	TOTAL DIRECT COSTS	OTHER FEES	TOTAL TASK AMOUNT
5.1 Additional Engineering Design	2				88	180							270	\$32,120			\$32,120
	\$420				\$11,000	\$20,700											
5.2 Additional Investigations - Previously Authorized																	
5.3 Additional Lab Testing						2	\$230				2		4	\$380	\$2,210		\$2,590
5.4 Piezometer and Inclinator Readings	1							24			\$150		25	\$2,730	\$269		\$2,999
	\$210							\$2,520									
5.5 Review of Plans and Specifications	1	4			20	20							45	\$5,770			\$5,770
	\$210	\$760			\$2,500	\$2,300											
5.6 Updated GDR and Tech Design Memos	6	4				24		8		12	12		66	\$7,540	\$220.00		\$7,760
	\$1,260	\$760				\$2,760	\$840			\$1,020	\$900						
<b>TOTALS</b>	<b>10</b>	<b>8</b>			<b>108</b>	<b>226</b>	<b>32</b>	<b>12</b>	<b>14</b>								
	\$210	\$190	\$170	\$155	\$135	\$115	\$105	\$95	\$85	\$75	\$58						
<b>AVERAGE HOURLY RATES</b>	<b>\$210</b>	<b>\$190</b>	<b>\$170</b>	<b>\$155</b>	<b>\$135</b>	<b>\$115</b>	<b>\$105</b>	<b>\$95</b>	<b>\$85</b>	<b>\$75</b>	<b>\$58</b>						
<b>TOTAL LABOR ESTIMATE</b>	<b>\$2,100</b>	<b>\$1,520</b>			<b>\$13,500</b>	<b>\$25,980</b>	<b>\$3,360</b>		<b>\$1,020</b>	<b>\$1,050</b>			<b>410</b>	<b>\$48,540</b>	<b>\$2,699</b>		<b>\$51,239</b>

TOTAL ESTIMATED FEES AND LABOR																
<b>TOTAL ESTIMATED FEES AND LABOR</b>																

DIRECT COSTS (ODC) BY TASK	5.1	5.2	5.3	5.4	5.5	5.6	TOTAL
Travel: Vehicles & Per Diem				29			29
Office: Reproduction & Software Usages						220	220
Drilling							
Subcontractors Traffic Control & Utility Check							
Field Equipment Rentals				240			240
Laboratory Testing				2,210			2,210
<b>Total</b>				<b>2,699</b>		<b>220</b>	<b>2,699</b>

Agenda Item No. 5.1

**Ordinance No. 12-1275**, For the Purpose of Amending Metro Code Section 2.12 Regarding the Office of Citizen Involvement and Metro Code Section 2.19.100 Regarding the Metro Committee for Citizen Involvement.

*Ordinances – Second Reading*

Metro Council Meeting  
Thursday, May 24, 2012  
Metro, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING METRO	)	ORDINANCE NO. 12-1275
CODE SECTION 2.12 REGARDING THE	)	
OFFICE OF CITIZEN INVOLVEMENT AND	)	Introduced by Metro Councilor Kathryn
METRO CODE SECTION 2.19.100 TO	)	Harrington
DISSOLVE THE METRO COMMITTEE FOR	)	
CITIZEN INVOLVEMENT (MCCI) AND	)	
ESTABLISH THE METRO PUBLIC	)	
ENGAGEMENT REVIEW COMMITTEE (PERC)	)	

WHEREAS, Metro is committed to obtaining meaningful input from residents of the Portland metropolitan region on Metro’s policies and programs, as described in the Metro Principles of Citizen Involvement set forth in Resolution 97-2433, adopted by the Metro Council on January 23, 1997 (the “Principles of Citizen Involvement”); and

WHEREAS, Chapter V, Section 27 of the Metro Charter establishes the Metro Office of Citizen Involvement and requires the Metro Council to establish a “citizens’ committee” in this office to aid communication between residents and the Council; and

WHEREAS, the Metro Office of Citizen Involvement is housed in the Metro Communications Department, which department is charged with, among other things, promoting communication between Metro and residents of the region; and

WHEREAS, as part of Metro’s citizen involvement program, a standing “citizens’ committee” in the Office of Citizen Involvement was established by ordinance and has been known as the Metro Committee for Citizen Involvement (“MCCI”); and

WHEREAS, given the rapidly evolving nature of communications technology and public engagement practices based on these technologies, the Metro Council desires to improve the effectiveness of its approach toward engaging residents in its planning, programs, and policy development activities;

WHEREAS, the current configuration and membership of the MCCI uses significant staff and budget resources and is not as effective as it could be in enabling Metro to take advantage of changes in best practices for public engagement; and

WHEREAS, the Metro Council finds that by replacing the MCCI with a new Public Engagement Review Committee (“PERC”) consisting of members of the public, representatives of community organizations, and public involvement staff, the Office of Citizen Involvement will be better able to recommend state of the art engagement strategies for connecting Metro with its communities and residents; and

WHEREAS, Metro’s public involvement process as modified by this Ordinance must comply with the Metro Charter and federal planning regulations for Metro to receive federal transportation funds; and the Metro Council finds that the changes set forth herein to Metro’s public participation processes are in compliance with the Metro Charter and with federal requirements in Title 23 Code of Federal Regulations, Parts 450 and 500, and Title 49 Code of Federal Regulations, Part 613; now therefore,



THE METRO COUNCIL HEREBY ORDAINS AS FOLLOWS:

1. Metro Code Chapter 2.12 regarding the Office of Citizen Involvement is amended to include an additional Chapter 2.12.020, as set forth in the redlined version of Metro Code Chapter 2.12, attached hereto as Exhibit A and incorporated herein.
2. The public engagement report prepared by the Office of Citizen Involvement and described in the revised Metro Code Chapter 2.12.020 shall replace the Public Involvement Planning Guide formerly created and updated by MCCI. Though the Public Involvement Planning Guide included the Principles of Citizen Involvement in its preface, neither the new public engagement report nor any other aspect of this Ordinance shall modify or replace the Principles of Citizen Involvement, which remain in full force and effect.
3. Metro Code Chapter 2.19.020(f) is repealed and replaced with the terms set forth in the redlined version of Metro Code Chapter 2.19.020(f), attached hereto as Exhibit B and incorporated herein.
4. Metro Code Chapter 2.19.070 "Status of All Advisory Committees" is amended as set forth in the redlined version of Metro Code Chapter 2.19.070(a), attached hereto as Exhibit C and incorporated herein.
5. Metro Code Chapter 2.19.100 is repealed in its entirety and replaced with the terms set forth in the redlined version of Metro Code Chapter 2.19.100, attached hereto as Exhibit D and incorporated herein.

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_, 2012.

\_\_\_\_\_  
Tom Hughes, Council President

Attest:

Approved as to Form:

\_\_\_\_\_  
Kelsey Newell, Recorder

\_\_\_\_\_  
Alison Kean Campbell, Metro Attorney

**Exhibit A to Ordinance No. 12-1275**

CHAPTER 2.12  
OFFICE OF CITIZEN INVOLVEMENT  
2.12.020 Public Engagement Report

The Office of Citizen Involvement shall prepare an annual public engagement report evaluating Metro's citizen involvement program and the prior year's public engagement practices, measuring outcomes, and providing recommendations for the upcoming year. The report shall be presented to the Public Engagement Review Committee (PERC) for review, comment and direction, and shall thereafter be presented to the Metro Council in order to share best practices and upcoming plans for public engagement.

**Exhibit B to Ordinance No. 12-1275**

CHAPTER 2.19  
METRO ADVISORY COMMITTEES  
2.19.020 Definitions

- ~~(f) “MCCI” means Metro Committee for Citizen Involvement.~~
- (f) “PERC” means the Public Engagement Review Committee.

**Exhibit C to Ordinance No. 12-1275**

CHAPTER 2.19  
METRO ADVISORY COMMITTEES  
2.19.070 Status of All Advisory Committees

(a) MPAC, JPACT, and ~~MCCI~~ PERC are Advisory Committees that have permanent and continuing existence. They shall report directly to the Council and the Council President. MPAC and ~~MCCI~~ PERC were created by the Metro Charter. JPACT was created pursuant to federal law and Executive Order of the Governor of Oregon. The Metro Council shall provide for these committees in the annual budget. The Chief Operating Officer shall provide reasonable staff support for these three (3) committees from any legally available and budgeted resources.

**Exhibit D to Ordinance No. 12-1275**

CHAPTER 2.19  
METRO ADVISORY COMMITTEES  
2.19.100 Public Engagement Review Committee (PERC)

~~2.19.100 Metro Committee for Citizen Involvement (MCCI)~~

~~\_\_\_\_\_ (a) Purpose. The purpose of the MCCI is to advise the Metro Council on the development and maintenance of programs and procedures to aid communication between citizens and the Metro Council. MCCI will advise the Office of Citizen Involvement (OCI) and Metro Council and perform the duties assigned to it by the Metro Charter and to perform other related duties that the Metro Council may prescribe.~~

~~\_\_\_\_\_ (b) Membership. The MCCI consists of twenty (20) members as follows:~~

~~\_\_\_\_\_ (1) Two (2) representatives from each of the six (6) Metro Council Districts and two \_\_\_\_\_ (2) at large representatives from the region (for a total of 14).~~

~~\_\_\_\_\_ (2) One (1) representative from each of the areas outside of the Metro boundaries of \_\_\_\_\_ Clackamas, Multnomah, and Washington Counties (for a total of 3).~~

~~\_\_\_\_\_ (3) One (1) representative from each of Clackamas County's Committee for Citizen \_\_\_\_\_ Involvement (CCI), Multnomah County Citizen Involvement Committee (CIC), \_\_\_\_\_ and Washington County Committee for Citizen Involvement (CCI) (for a total of \_\_\_\_\_ 3).~~

~~\_\_\_\_\_ (c) Terms. Notwithstanding the provisions of Section 2.19.030(c), MCCI members may be appointed to fill up to three (3) consecutive two (2) year terms.~~

~~\_\_\_\_\_ (d) Current Membership. Current MCCI members may complete their current term. At the completion of their current term, the member may reapply for any open seats in the district or area they represent, unless the current member has reached the term limit for service on the committee.~~

2.19.100 Public Engagement Review Committee (PERC)

(a) Purpose. The purpose of the PERC is to advise the Metro Council on the development and maintenance of programs and procedures to aid communication between the public and the Metro Council. PERC will advise the Office of Citizen Involvement (OCI) and the Metro Council, and perform the duties assigned to it by the Metro Charter and other related duties that the Metro Council may prescribe.

(b) Membership. The PERC consists of nine (9) members as follows:

(1) Three (3) at large representatives from the region.

(2) Three (3) representatives appointed from nominees of community associations, cooperatives, or other nonprofit groups

**Exhibit D to Ordinance No. 12-1275**

in the region. Notwithstanding Chapter 2.19.030(c)(3)(B), representatives appointed from these groups shall be subject to the limitations on terms provided in Chapter 2.19.030(c)(2).

- (3) One (1) representative who is a county employee from each of Clackamas, Multnomah, and Washington Counties (for a total of 3). Each county will nominate an employee whose duties with the county are in a public engagement capacity. A county may alternatively nominate an employee of a local government entity (such as a city or special district) within such county whose duties with such entity are in a public engagement capacity, with the consent of the entity's administrator.

## STAFF REPORT

IN CONSIDERATION OF ORDINANCE **NO.12-1275**, FOR THE PURPOSE OF AMENDING METRO CODE SECTION 2.12 REGARDING THE OFFICE OF CITIZEN INVOLVEMENT AND METRO CODE SECTION 2.19.100 TO DISSOLVE THE METRO COMMITTEE FOR CITIZEN INVOLVEMENT (MCCI) AND ESTABLISH THE METRO PUBLIC ENGAGEMENT REVIEW COMMITTEE (PERC).

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Date: May 7, 2012

Prepared by: Patty Unfred x1685

### BACKGROUND

Metro's Office of Citizen Involvement has developed a new public engagement review process designed to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices. The Metro Committee for Citizen Involvement (MCCI) was established in 1991 by the Metro charter and was most recently conceived of as a 20 member committee charged with oversight of the agency's public involvement efforts. The MCCI was suspended in 2010 due to declining participation that limited its effectiveness and ability to represent the region.

Since that time, Metro staff has engaged community stakeholders and local public involvement peers to create a new multi-track public engagement review process that includes a semi-annual meeting of professional public involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee (PERC). An annual public survey and subsequent annual report will be used to evaluate Metro's public involvement efforts.

*It is important to note that the new process involves public and peer review of and input into Metro's public involvement plans. It does NOT cover or address – or replace - the numerous public involvement activities and engagement efforts conducted by Metro staff throughout the year. All Metro public engagement activity is guided by the principles of citizen involvement adopted by the Metro Council in 1997. The new process is designed to be more effective, increase best practices sharing and development among jurisdictions throughout the region, and more successfully engage communities with Metro's initiatives, helping to prioritize projects for public outreach.*

### ANALYSIS/INFORMATION

1. **Known Opposition** None
2. **Legal Antecedents**
3. **Anticipated Effects** The new process is designed to be more effective, increase best practices sharing and development among jurisdictions throughout the region, and more successfully engage communities with Metro's initiatives, helping to prioritize projects for public outreach.

4. **Budget Impacts** No budget impacts. Program needs are addressed through a shifting of existing staff resources and accessing Communications M&S included in the COO proposed budget for FY 2012-13.

**RECOMMENDED ACTION**

Staff recommends adoption of Ordinance 12-1275.





## **Metro Public Engagement Review**

**Draft – May 8, 2012**

### **Introduction and overview**

In response to evolving communications and public engagement practices, Metro staff has developed a multi-track public engagement review process. Public engagement review engages the public, community organizations, and local government public involvement staff to actively monitor and contribute to Metro's public engagement efforts. Efficient public engagement at the project and program level requires review at the agency level. The new process is in addition to the public involvement outreach done regularly at the project and program levels. All Metro public engagement activity is guided by the principles of citizen involvement adopted by the Metro Council in 1997.

### **Mission**

Active public engagement is essential to Metro's role as regional convener and makes Metro a more responsive and collaborative agency. Metro believes that good government requires the collaboration of elected officials, staff and representation of diverse residents of the region. Continual cooperation among these parties results in rich and sustainable policy decisions. Therefore, Metro is committed to fostering a robust public engagement environment.

Metro's public engagement review process provides:

1. Constructive feedback on Metro's public engagement practices.
2. More focused and effective public engagement activity.
3. Access to local expert knowledge and best practices.

### **Purpose**

The public engagement review process guides Metro staff in the development and implementation of successful public engagement outreach with residents of the region.

### **Objectives and outcomes**

**Build public trust:** through transparent and open policy development and planning processes. Respect and consider all community input.

**Build sustainable decisions:** by convening diverse regional stakeholders and residents in order to identify and realize mutual interests and beneficial outcomes.

**Promote equity:** by recognizing the rich diversity of the region and ensuring that benefits and burdens of growth and change are distributed equitably.

**Understand local aspirations:** by engaging local experts and community members in order to access local knowledge and aspirations.

**Achieve efficiency:** by organizing public engagement activities to make the best use of public participants' time, effort, and interests.

**Improve best practices:** by coordinating with other public involvement experts and community members.

**Broaden outreach:** by engaging populations that have been historically underrepresented in regional policy discussions and decisions, such as older people, young adults, the disabled, communities of color, and people of lower income.

## Tools and tactics

Metro will convene a standing Public Engagement Review Committee, a stakeholder summit, and Public Engagement Peer Group to monitor Metro's public engagement efforts. The public engagement review process will also include an annual Opt In public engagement review survey and the production of an annual public engagement report. Tools and tactics are outlined below.

### Public Engagement Review Committee (PERC)

Chapter V, Section 27 of the Metro Charter requires that a standing "citizens' committee" be established and maintained by the Metro Office of Citizen Involvement. The Public Engagement Review Committee (PERC) meets this requirement. The PERC will convene twice each year, in May or June and again in November.

Duties of the PERC include:

- Assist in developing the stakeholder summit agenda
- Assist with outreach to stakeholder summit participants
- Assist in facilitating the stakeholder summit
- Review the annual public engagement report
- Provide input on content of the annual Opt In public engagement review survey

The Committee will be made up of public involvement staff persons from Clackamas, Multnomah, and Washington county governments; staff persons from community organizations; and at-large community members as follows:

Clackamas County.....	1
Multnomah County.....	1
Washington County.....	1
Community Organizations.....	3
At-large Community Member.....	3

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9 total members

Members of the PERC will be appointed as follows:

- Representatives (and alternates if desired) of the counties shall be appointed by the presiding executive of their jurisdiction/agency. Alternatively, a county may nominate an employee of a city or special district within the county, with the consent of the jurisdiction's administrator.
- Community member and community organization representatives and their alternates will be nominated through a public application process, confirmed by the Metro Council, and appointed by the Metro Council President.

Criteria for the selection of community member and community organization representatives include:

- **Community Service:** Demonstrated commitment to community involvement.
- **Experience:** Demonstrated skills, knowledge or experience valuable to support Metro's public engagement principles.
- **Diversity:** Collectively representative of the geographic and demographic diversity of the region.

### **Stakeholder Summit**

Metro will convene an annual summit of community stakeholders representing diverse aspects of the region, members of Metro citizen advisory committees and oversight committees on ongoing projects. Meetings will be advertised and open to the general public.

The function of the stakeholder summit is to:

- Evaluate Metro public engagement practices from the previous year
- Share local community information
- Give advice on priorities and engagement strategies for upcoming Metro policy initiatives

### **Public Engagement Peer Group**

Metro will convene two meetings annually of public engagement staff and professionals from across the Portland metropolitan region.

The function of the public engagement peer group is to:

- Share and learn about best practices and new tools, including international, national and local examples and case studies
- Share information, upcoming policy discussions and events in order to facilitate collaboration and leverage individual jurisdiction outreach efforts
- Provide input on public engagement process for individual projects
- Document best practices for public engagement
- Review and update public engagement principles and planning guide

## **Public engagement review annual schedule**

### **Winter**

Public engagement peer group meeting #1

### **Spring**

Public Engagement Review Committee meeting #1

- Assist with pre-planning stakeholder summit

Public engagement peer group meeting #2

- Assist with pre-planning stakeholder summit

### **Early fall**

Stakeholder summit

Annual Opt In public engagement review survey

### **Late fall**

Annual public engagement report released

Public engagement review committee meeting #2

- Review annual public engagement report

## **Measurement and evaluation**

The success of Metro's public engagement program is defined by consistently effective and efficient communication between Metro and the public. Metro staff will use the following tools to evaluate the success of Metro's public engagement processes:

- An annual Opt In public engagement review survey will measure public perception of Metro's public engagement processes
- Stakeholder summit and public engagement peer group participant interviews, questionnaires, and/or collected comments
- The public engagement report will summarize project evaluations, including:
  - Objectives
  - Context
  - Levels of involvement
  - Methods and techniques used
  - Who was involved (and who was not involved)
  - Inputs (costs)
  - Outputs (products and activities)
  - Outcomes (benefits/impacts)

Agenda Item No. 5.2

**Ordinance No. 12-1278**, For the Purpose of Amending the  
Regional Transportation Functional Plan to Remove the  
Schedule for Updating City and County Transportation System  
Plans; to Add an Exemption Process; and to Revise Procedures  
for Extensions and Exceptions.

*Ordinances – Second Reading*

Metro Council Meeting  
Thursday, May 24, 2012  
Metro, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE	)	ORDINANCE NO. 12-1278
REGIONAL TRANSPORTATION FUNCTIONAL	)	
PLAN TO REMOVE THE SCHEDULE FOR	)	
UPDATING CITY AND COUNTY	)	
TRANSPORTATION SYSTEM PLANS; TO ADD	)	Introduced by Chief Operating Officer Martha
AN EXEMPTION PROCESS; AND TO REVISE	)	J. Bennett with the Concurrence of Council
PROCEDURES FOR EXTENSIONS AND	)	President Tom Hughes
EXCEPTIONS	)	

WHEREAS, the Metro Council adopted the 2035 Regional Transportation Plan (RTP) by Ordinance No. 10-1241B (For the Purpose of Amending the 2035 RTP (Federal Component) and the 2004 RTP to Comply with State Law; to add the Regional Transportation Systems Management and Operations Action Plan, the Regional Freight Plan and the High Capacity Transit System Plan; to amend the Regional Transportation Functional Plan (RTFP) and add it to the Metro Code; to amend the Regional Framework Plan; and to amend the Urban Growth Management Functional Plan) on June 10, 2010; and

WHEREAS, the RTFP contains a schedule for city and county updates to their transportation systems plans (TSPs) (Table 3.08-4); and

WHEREAS, a number of cities and counties have been unable to meet the schedule for updates due to budgetary and other limitations on their resources; and

WHEREAS, several cities seek exemptions from the requirements of the RTFP, which the RTFP does not authorize; and

WHEREAS, section 660-012-0055(6) of the Transportation Planning Rule (TPR) authorizes the director of the Department of Land Conservation and Development to grant small cities and counties exemptions from the TPR, but such exemptions are not fully effective without exemptions from associated requirements of the RTFP; and

WHEREAS, the RTFP provides procedures for extensions of time for compliance with, and exceptions from requirements of the RTFP, both of which, unlike similar procedures in the Urban Growth Management Functional Plan, require hearings before the Metro Council; and

WHEREAS, the Joint Policy Advisory Committee on Transportation and the Metro Policy Advisory Committee both considered the proposed amendments and recommended that the Metro Council adopt the amendments; and

WHEREAS, the Metro Council held a public hearing on the proposed amendments on May 24, 2012, on the proposed amendments; now, therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. The RTFP is hereby amended, as indicated in Exhibit A, attached and incorporated into this ordinance, to repeal the schedule for TSP updates in Table 3.08-4; to add a process for exemptions from the requirements of the RTFP; and to revise the procedures for

extensions of time and exceptions to allow the Chief Operating Officer to grant extensions and exceptions subject to appeal to the Metro Council.

- 2. The Findings of Fact and Conclusions of Law, attached and incorporated into this ordinance as Exhibit B, are adopted as the Council’s explanation how the amendments to the RTFP comply with the Regional Framework Plan and state law.

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_, 2012.

\_\_\_\_\_  
Tom Hughes, Council President

Attest:

Approved as to Form:

\_\_\_\_\_  
Kelsey Newell, Regional Engagement Coordinator

\_\_\_\_\_  
Alison Kean Campbell, Metro Attorney

Exhibit A to Ordinance No. 12-1278

Amendments to Metro Code Chapter 3.08  
Regional Transportation Functional Plan

3.08.620 Extension of Compliance Deadline

- A. A city or county may seek an extension of time for compliance with the RTFP by filing an application on a form provided by the COO. Upon receipt of an application, the ~~Council President shall set the matter for a public hearing before the Metro Council and shall notify the city or county, the Department of Land Conservation and Development (DLCD) and those persons who request notification of applications for extensions~~ COO shall notify the city or county, the Oregon Department of Transportation and those persons who request notification of applications for extensions. Any person may file a written comment in support of or opposition to the extension.
- B. ~~The Council shall hold a public hearing to consider the application. Any person may testify at the hearing. The Council~~ COO may grant an extension if ~~it finds that~~ the city or county is making progress toward compliance ~~with the RTFP; or There~~ there is good cause for failure to meet the compliance deadline. Within 30 days after the filing of a complete application for an Extension, the COO shall issue an order granting or denying the extension. The COO shall not grant more than two extensions of time. The COO shall send the order to the city or county and any person who filed a written comment.
- C. The ~~Council~~ COO may establish terms and conditions for an extension ~~in order~~ to ensure that compliance is achieved in a timely and orderly fashion and that land use decisions made by the city or county during the extension do not undermine the ability of the city or county to achieve the purposes of the RTFP requirement. A term or condition must relate to the requirement of the RTFP for which the Council grants the extension. The COO shall incorporate the terms and conditions into the order on the extension. ~~The Council shall not grant more than two extensions of time, nor grant an extension of time for more than one year.~~
- D. The city or county applicant or any person who filed written comment on the extension may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a



Exhibit A to Ordinance No. 12-1278

hearing to consider the appeal. TheAfter the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county, ~~the DLCD~~ and any person who participated in the proceeding. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10)(a)(A).

3.08.630 Exception from Compliance

- A. A city or county may seek an exception from compliance with a requirement of the RTFP by filing an application on a form provided by the COO. Upon receipt of an application, the ~~Council President shall set the matter for a public hearing before the Metro Council and shall notify the DLCD and those persons who request notification of requests for exceptions~~COO shall notify the city or county, the Oregon Department of Transportation and those persons who request notification of requests for exceptions. Any person may file a written comment in support of or opposition to the exception.

~~Following the public hearing on the application, the Metro Council~~The COO may grant an exception if ~~it finds~~:

B.

1. It is not possible to achieve the requirement due to topographic or other physical constraints or an existing development pattern;
2. This exception and likely similar exceptions will not render the objective of the requirement unachievable region-wide;
3. The exception will not reduce the ability of another city or county to comply with the requirement; and
4. The city or county has adopted other measures more appropriate for the city or county to achieve the intended result of the requirement.

- B. Within 30 days after the filing of a complete application for an exception, the COO shall issue an order granting or denying the exception.

- C. The ~~Council~~COO may establish terms and conditions for the exception in order to ensure that it does not undermine the ability of the region to achieve the policies of the RTP.

**Exhibit A to Ordinance No. 12-1278**

A term or condition must relate to the requirement of the RTFP to which the Council grants the exception. The COO shall incorporate the terms and conditions into the order on the exception.

- D. The city or county applicant or a person who filed a written comment on the exception may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a hearing to consider the appeal. TheAfter the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county, the DLCD and those persons who have requested a copy of the order. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10) (a) (A).

3.08.640 Exemptions

- A. A city or county may seek an exemption from the requirements of the RTFP. Upon receipt of a request, the COO shall notify the city or county, the Department of Land Conservation and Development, the Oregon Department of Transportation and those persons who request notification of applications for exemptions. Any person may file a written comment in support of or opposition to the exemption.
- B. The COO may grant an exemption from some or all requirements if:
1. The city or county's transportation system is generally adequate to meet transportation needs;
  2. Little population or employment growth is expected over the period of the exemption;
  3. The exemption would not make it more difficult to accommodate regional or state transportation needs;  
and
  4. The exemption would not make it more difficult to achieve the performance objectives set forth in section 3.08.010A.
- C. Within 30 days after the filing the request for an exemption, the COO shall issue an order granting or denying the exemption.
- D. The COO shall prescribe the duration of the exemption and may establish other terms and conditions for the exemption

**Exhibit A to Ordinance No. 12-1278**

so long as the terms and conditions relate to the requirement of the RTFP to which the Council grants the exemption. The COO shall incorporate the terms and conditions into the order on the exemption.

- E. The city or county applicant or any person who filed written comment on the exemption may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a hearing to consider the appeal. After the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county and any person who participated in the proceeding. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10) (a) (A).

**Exhibit B to Ordinance No. 12-1278**

**Findings of Fact and Conclusions of Law**

[PLACEHOLDER]

## STAFF REPORT

IN CONSIDERATION OF ORDINANCE NO. 12-1278, FOR THE PURPOSE OF AMENDING THE REGIONAL TRANSPORTATION FUNCTIONAL PLAN TO REMOVE THE SCHEDULE FOR UPDATING CITY AND COUNTY TRANSPORTATION SYSTEM PLANS; TO ADD AN EXEMPTION PROCESS; AND TO REVISE PROCEDURES FOR EXTENSIONS AND EXCEPTIONS

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Date: April 9, 2012

Prepared by: John Mermin, 503-797-1747

### BACKGROUND

The Regional Transportation Functional Plan (RTFP) is part of Metro Code (Chapter 3.08) and implements the policies contained in the Regional Transportation Plan. Cities and Counties local transportation system plans and implementing ordinances must be consistent with the Regional Transportation Functional Plan.

The Metro Council approved the 2035 Regional Transportation Plan and Regional Transportation Functional plan on June 10, 2010. Metro consulted with each city and county to determine a timeline for this local work and adopted a schedule that is part of the RTP Ordinance (No.10-1241B). Since that time four jurisdictions were unable to meet 2011 deadlines due to resource constraints and other limitations. Metro staff expects several local jurisdictions to be unable to meet the existing schedule for 2012.

On December 16, 2010 Metro Council adopted Ordinance 10-1244B which amended several Urban Growth Management Functional Plan titles, including streamlining the local compliance procedures described in Title 8. Formerly the process for receiving extensions and exceptions was time consuming for the Council and local governments since it required a public hearing and decision by the Metro Council. Ordinance 10-1244B amended the procedure to make the granting of extensions & exceptions administrative decisions of Metro's Chief Operating Officer, with possible appeal to the Metro Council.

Since the adoption of the RTFP, the City of Rivergrove contacted Metro staff inquiring about exemption from its requirements. The Regional Transportation Functional Plan does not address the issue of exemptions. Metro staff believes there are other communities in the region that would be interested in an exemption process. The State Transportation Planning Rule (TPR) includes a provision for exemption from its requirements, but Metro had not previously addressed exemption from regional transportation requirements.

#### Staff Recommendation

*Extensions & Exceptions* - Metro staff recommends amending the RTFP procedures for extending compliance deadlines (3.08.620) and granting exceptions to specific requirements (3.08.630) to match the procedures within the UGMFP (3.07.830 and 3.07.840). The changes would make requests from local governments for extensions or exceptions administrative functions of Metro's Chief Operating Officer (COO), but still allow for an appeal to the Metro Council.

*Exemptions* - Staff recommends amending the RTFP to add a section (3.08.640) providing for exemption from all or some RTFP requirements. A jurisdiction would be eligible for an exemption if:

- its existing transportation system is generally adequate to meet its needs,
- little population or employment growth is expected, and

- exempting them would not make it more difficult to accommodate regional or state needs, or to meet regional performance targets.

Staff believes that five jurisdictions, Johnson City, Maywood Park, King City, Durham and Rivergrove, may meet these criteria and may wish to apply for exemption from RTFP requirements. To receive an exemption a jurisdiction would need to send a formal request to Metro's COO.

*Schedule of deadlines* - Metro staff recommends moving the schedule for RTFP compliance (Table 3.08-4) from the RTFP into the RTP Appendix (Exhibit A to Ordinance No. 10-1241) 2013. This change will ensure that Metro code need not be amended in the future when the COO grants extensions to compliance deadlines.

## **ANALYSIS/INFORMATION**

### **1. Known Opposition**

None known at this time.

### **2. Legal Antecedents**

- Metro Ordinance No.10-1241B, which included adoption of the Regional Transportation Plan and Regional Transportation Functional Plan
- Metro Ordinance No.10-1244, which included updates to the Urban Growth Management Functional Plan to streamline the compliance process to make the granting of extensions and exceptions an administrative decision of Metro's Chief Operating Officer

### **3. Anticipated Effects**

Adoption of the legislative would amend Title 6 of the Regional Transportation Functional Plan (Compliance Procedures).

### **4. Budget Impacts**

None

## **RECOMMENDED ACTION**

Metro Staff recommends that the Council adopt Ordinance No.12-1278

Agenda Item No. 6.1

**Resolution No. 12-4349**, For the Purpose of Adopting the  
Regional Travel Options 2012-2017 Strategic Plan.

*Resolutions*

Metro Council Meeting  
Thursday, May 24, 2012  
Metro, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE	)	RESOLUTION NO. 12-4349
REGIONAL TRAVEL OPTIONS 2012-2017	)	
STRATEGIC PLAN	)	Introduced by Chief Operating Officer Martha
	)	Bennett with the concurrence of Council
	)	President Tom Hughes

WHEREAS, Metro adopted the 2035 federal Regional Transportation Plan on June 10, 2010; and

WHEREAS, the Regional Transportation Plan calls for the region to adopt strategies and make investments intended to encourage people to use transit, rideshare, bicycle, walk and other methods aimed at reducing drive-alone automobile trips; and

WHEREAS, the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee that provides oversight for the development and evaluation of travel options strategies has engaged regional stakeholders through a strategic planning process and has developed the Regional Travel Options 2012-2017 Strategic Plan to support implementation of Regional Transportation Plan goals and objectives; and

WHEREAS, the Regional Travel Options 2012-2017 Strategic Plan describes the goals, objectives, strategies and priorities the program will carry out; and

WHEREAS, the Regional Travel Options 2012-2017 Strategic Plan describes the roles of Metro and program partners in carrying out program activities and identifies a base budget to support those activities, and

WHEREAS, the Regional Travel Options 2012-2017 Strategic Plan recommends eliminating the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee established by Resolution No. 92-1610, and creating a working group comprised of Transportation Policy Alternatives Committee members and other interested parties for the purpose of making grant funding and policy recommendations related to the Regional Travel Options program, and

WHEREAS, the Regional Travel Options 2012-2017 Strategic Plan recommends eliminating dedicated funding for Transportation Management Associations provided for in Resolution No. 02-3183, and creating a new Regional Travel Options grant program to support Transportation Management Associations and other local and regional programs and projects that carry out Strategic Plan goals and objectives; now therefore,

BE IT RESOLVED that the Metro Council hereby:

1. Adopts the Regional Travel Options 2012-2017 Strategic Plan and approves the missions, goals, strategies, and actions in that Plan;
2. Eliminates (1) the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee established by Resolution No. 92-1610; and (2) dedicated funding for the Transportation Management Associations provided by Resolution No. 02-3183.



ADOPTED by the Metro Council this 24th day of May 2012.

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Tom Hughes, Council President

Approved as to Form:

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Alison Kean-Campbell, Metro Attorney

## STAFF REPORT

### IN CONSIDERATION OF RESOLUTION NO. 12-4349, FOR THE PURPOSE OF ADOPTING THE REGIONAL TRAVEL OPTIONS 2012-2017 STRATEGIC PLAN

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Date: May 1, 2012

Prepared by: Dan Kaempff

## RECOMMENDATION

Staff recommends adoption of the goals, strategies and priorities described in the Regional Travel Options (RTO) 2012-2017 Strategic Plan (Exhibit A). The plan emphasizes regional collaboration and coordination to leverage resources, avoid duplication and maximize program impacts.

The RTO Subcommittee of Transportation Policy Alternatives Committee (TPAC) developed the RTO 2012-2017 Strategic Plan in consultation with program partners and stakeholders, and recommended adoption of the plan at their February 8, 2012 meeting.

## BACKGROUND

### Program mission

*“The mission of the RTO program is to 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.”*

### Program purpose

The RTO Program supports implementation of the 2035 Regional Transportation Plan (RTP) and carries out regional policy to increase use of travel options, reduce pollution, and improve mobility. The program focuses on making strategic investments that encourage the use of the alternatives to driving alone – carpooling, vanpooling, riding transit, cycling, walking and telecommuting.

The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours. RTO strategies offer low-cost solutions that: address employer and commuter transportation needs, save consumers money, reduce vehicle emissions that contribute to air pollution and global warming, and encourage active travel modes that enhance public health and increase physical activity.

### Strategic plan guiding principles 2012-2017

- Enable local partners to reach out to employers and residents to help make non-SOV travel choices.
- Link the RTO program to other Metro programs to proactively integrate transportation demand management into regional planning and growth management processes.
- 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.

**Program structure and recommended changes**

Historically, the RTO Subcommittee of TPAC has provided program oversight and recommended strategic plan updates, annual work plans and budgets, and RTO policies for approval by TPAC, JPACT and the Metro Council. The subcommittee has also overseen the RTO Grants Program and allocated funds to local projects and programs through a competitive process administered by Metro.

Nelson\Nygaard Consulting Associates led a team of consultants to create the 2012-2017 RTO Strategic Plan. They conducted an extensive process aimed at gathering stakeholder input and analyzing the existing program and its outcomes to date. Based on this, the 2012-2017 RTO Strategic Plan recognizes the successes and strengths of the existing RTO program. But it makes a number of recommendations aimed at improving the performance of the program, and better aligning program investments with the 2035 RTP Triple-Bottom Line desired outcomes of Economy, Environment, and Equity.

Under the recommended plan, Metro continues to administer the regional program, including carrying out funding agreements, measuring results and supporting partner collaboration. Metro will continue coordination of the regional Drive Less/Save More marketing campaign in partnership with the Oregon Department of Transportation (ODOT). Metro will also continue administration of the regional rideshare program, which includes the Metro VanPool incentive program, and customer service support for Drive Less. Connect., the region’s online ride-matching service.

Public and private partners carry out the balance of RTO strategies through grant agreements. TriMet and Wilsonville SMART will continue to receive dedicated funding levels to support their role of providing the base level employer outreach program for the region. Other partners – cities, counties, Transportation Management Associations (TMA) and other non-profit NGOs – are eligible to apply for funding through the RTO grant program.

Three significant changes are recommended by the 2012-2017 RTO Strategic Plan:

1. Responding to input that identified the need for increased clarity of partners’ roles and for reducing duplication of effort, the plan calls for Metro to reduce its role in employer outreach and transfers the duties of coordination of the employer and commuter programs to TriMet. This will result in the elimination of 1.0 FTE from the RTO budget.
2. The plan recommends that funding and policy recommendation functions be transferred from the existing RTO Subcommittee of TPAC<sup>1</sup> to a newly formed work group comprised of TPAC members and other interested parties. The purpose of this recommendation is to address the issue of funding decisions being made by the parties directly receiving funds, and to better integrate the RTO program with other regional initiatives.

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<sup>1</sup> Established by Metro Resolution No. 92-1610 as the TPAC TDM Subcommittee; subsequently renamed the RTO Subcommittee

To continue leveraging the collective experience of the RTO Subcommittee membership, Metro will convene regular meetings of partners to coordinate program activities, develop collaborative strategies and discuss future program needs and direction.

3. Finally, the plan recommends that the policy of dedicating a portion of program funds for the use of the region's Transportation Management Associations (TMA) be ended.<sup>2</sup> This recommendation is based on the findings that TMAs show no performance gains over other RTO program investments.

To ensure that balance is achieved between regional equity and performance goals, staff is recommending that a portion of the grant funding total be divided into sub-regional targets, and that each sub-region have the ability to identify their prioritized projects for submission to the RTO grant program. Identified sub-regions are:

- City of Portland
- Clackamas County
- East Multnomah County (balance of the county not including Portland)
- Washington County

This will enable each sub-region to have a degree of base level program funding to ensure that current successful programs can continue (provided other grant criteria and performance standards are met), but still allow for a robust open competitive grant process and the ability to fund region-wide and other highly-rated projects.

Among these four sub-regions, there is a diversity of existing programs, local needs and decision-making processes between partners. Metro staff recognizes that flexibility in how local project priorities are established is critical.

Recognizing that, Metro staff is recommending that the grant selection process contain the provision for each of the four sub-regions to indicate up to two top prioritized projects from the list of projects submitted from their area. This prioritization would be included as a component of the criteria, thus giving these prioritized projects additional weight and helping to ensure their funding, provided they are coordinated with RTO program goals and objectives, and meaningfully address other aspects of grant criteria. Prioritized projects would be accepted from county coordinating committees, cities (working jointly or singularly), or other RTO partners.

In order to carry out the goals and objectives of the 2012-2017 Strategic Plan, projects that are a continuation of existing successful initiatives, such as TMAs or local jurisdiction's outreach programs, and show a high degree of in-kind or fiscal support from local partners would be ranked higher than new projects or projects with lower levels of local support.

Local prioritization of projects would enable each sub-region to support local TMAs or other RTO activities that best address the needs and opportunities in their particular area. It helps to ensure that funding is distributed in a manner that carries out the RTO program mission by addressing regional equity and a balanced service delivery model.

Further work to fully develop this concept remains to be done, particularly in how the program can ensure sub-regional priorities will address program performance objectives. Staff will develop recommendations

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<sup>2</sup> Established by Metro Resolutions No. 98-2676 and 99-2864, amended by Metro Resolution No. 02-3183

to inform the work of the TPAC work group that will be charged with developing the RTO grant program criteria.

### **Program revenue sources**

The 2012-2017 Strategic Plan identifies three primary program revenue sources, including federal funds allocated through the regional MTIP process, ODOT grants to support specific projects and matching funds contributed by Metro and local agencies.

MTIP revenues are in place for the first three fiscal years of the strategic plan, FY 13 through FY 15, and the plan will be the basis for applying for funds for FY16 and FY 17. The strategic plan calls for the program to continue to seek additional grants, sponsorships and cost-sharing partnerships to leverage federal funds and support program priorities.

### **Program impacts**

As part of the Strategic Plan development, Nelson\Nygaard conducted a program evaluation covering program activities during 2009-2011. Findings from the 2009-2011 RTO Program Evaluation showed that RTO investments accomplished the following outcomes:

- Reduction of an estimated 77-123 million vehicle miles traveled
- The Drive Less. Save More. campaign helped over 222,000 people reduce their car trips
- TMAs worked with over 70,000 employees, capturing commute trip data on 40,000 of these
- Over 1,400 worksites have transportation programs in place, a 27 percent increase over the previous evaluation period
- The non-SOV mode split for employers working with the employer outreach program increased from 34.6 percent in 2008 to 38.5 percent in 2011

The full program evaluation can be found as Appendix D of the 2012-2017 RTO Strategic Plan.

## **ANALYSIS/INFORMATION**

1. **Known Opposition** None.

2. **Legal Antecedents**

1991 Federal Clean Air Act Amendments. The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474 in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

TDM Relationship to DEQ’s Ozone Maintenance Plan (Governor’s Task Force on Motor Vehicle Emissions Reduction (HB 2214). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2968B) provides TDM policies and objectives that direct the region’s planning and investment in the regional TDM program.

Regional Travel Options 5-Year Strategic Plan. The strategic plan established a new vision for the region’s transportation demand management programs and proposed a reorganized and renamed Regional

Travel Options program that emphasized partner collaboration to implement an integrated program with measurable results. JPACT and the Metro Council adopted the plan through Resolution No. 04-3400, which also renamed the TDM Subcommittee the RTO Subcommittee, and was adopted in January 2004. The subsequent 2008-2013 Strategic Plan was adopted through Resolution No. 08-3919 on April 3, 2008.

2035 Regional Transportation Plan. The federal component of the plan was approved by Metro Council Ordinance No. 10-1241B on June 10, 2010. The RTP establishes system management and trip reduction goals and objectives that are supported by the RTO program strategies.

2012-2015 MTIP. Programmed funding to the RTO program for FF years 2012-2015, and documents the authority to sub-allocate funds to the program components. JPACT and the Metro Council adopted the 2012-2015 MTIP through Resolution No. 12-4332.

### 3. Anticipated Effects

**Allocation of funds to local projects and programs:** The strategic plan references annual funding sub-allocations for TriMet and Wilsonville SMART. TriMet will apply directly to the Federal Transit Administration for funds and the RTO program's MTIP allocation will be amended to sub-allocate those funds to TriMet.

The RTO Grants Program will allocate grant funds to support projects that advance program priorities through a competitive grant process developed by the TPAC working group and administered by Metro.

### 4. Budget Impacts

No direct impacts. The Strategic Plan provides the policy framework for the sub-allocation of program funds adopted in the 2012-2015 MTIP by Resolution 12-4332 and for future Metro budget decisions to be considered annually by the Metro Council.

## RECOMMENDED ACTION

1. Adopt the Regional Travel Options 2012-2017 Strategic Plan and approve the missions, goals, strategies, and actions in that Plan;
2. Eliminate (1) the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee established by Resolution No. 92-1610; and (2) dedicated funding for the Transportation Management Associations provided by Resolution No. 02-3183



**Date:** May 2, 2012  
**To:** Joint Policy Advisory Committee on Transportation and Interested Parties  
**Cc:**  
**From:** Dan Kaempff, Principal Transportation Planner  
**Re:** **2012-2017 RTO Strategic Plan Adoption**

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### **Background**

The Draft 2012-2017 RTO Strategic Plan lays out a framework for building on past successes through a realignment of the program with regional desired outcomes and Regional Transportation Plan triple-bottom line objectives (Equity, Economy and Environment). Specific recommendations include a refined set of goals and objectives, clarification and consolidation of roles and responsibilities, broadened measurement and evaluation criteria, and consolidation of three separate grant programs into one.

The consolidation of the grant programs has been the primary topic of discussion throughout the Strategic Plan adoption process. The primary point of concern has been regarding the recommended elimination of the dedicated grant program for Transportation Management Associations (TMA). The consultant's recommendation to eliminate this dedicated grant program was based on improving program performance. Program evaluation findings showed that TMAs performed no better or worse than other RTO program investments, despite the TMAs having a dedicated source of funding.

Concerns were raised at TPAC and JPACT that removing dedicated funds for TMAs would potentially damage those organizations' ability to deliver results, or in some cases, threaten their existence.

Metro staff has expressed concern that continuing to provide dedicated funding for a particular type of organization, as opposed to directing funding to projects that consistently perform well, would hamper the ability of the RTO program as a whole to achieve desired regional outcomes.

In response, Metro staff gathered input from regional stakeholders through meetings as well as a public comment period (see summary at the end of this memo). What we heard was that a.) in areas where TMAs existed, they were seen as strong and valuable partners of local government in helping to address transportation and economic issues, and b.) there were also needs in those areas without TMAs or where other RTO strategies were warranted.

To address these concerns, staff have developed the following recommendations. TPAC considered this proposal at their April 27 meeting and have recommended JPACT approval.

### **Establish sub-regional funding targets**

To ensure that balance is achieved between regional equity and performance goals, staff is recommending that a portion of the grant funding total be targeted for prioritized projects, and be divided into amounts by sub-region. Identified sub-regions are:

- City of Portland
- Clackamas County
- East Multnomah County (balance of the county not including Portland)
- Washington County

This would enable each sub-region to have a degree of base level program funding to ensure that current successful programs can continue (provided other grant criteria and performance standards are met), but still allow for a robust open competitive grant process and the ability to fund region-wide and other highly-rated projects.

Further work to fully develop this concept remains to be done, particularly in how the program can ensure sub-regional priorities will address program performance objectives. Staff will develop recommendations to inform the work of the TPAC work group that will be charged with developing the RTO grant program criteria.

### **Local project prioritization**

Among these four sub-regions, there is a diversity of existing programs, local needs and decision-making processes between partners. The need to allow flexibility in how local project priorities are established is critical.

Recognizing that, Metro staff is recommending that the grant selection process contain the provision for each of the four sub-regions to indicate up to two top prioritized projects from the list of projects submitted from their area. This prioritization would be included as a component of the criteria, thus giving these prioritized projects additional weight and helping to ensure their funding, provided they are coordinated with RTO program goals and objectives, and meaningfully address other aspects of grant criteria. Prioritized projects would be accepted from county coordinating committees, cities (working jointly or singularly), or other RTO partners.

In order to carry out the goals and objectives of the 2012-2017 Strategic Plan, projects that are a continuation of existing successful initiatives, such as TMAs or local jurisdiction's outreach programs, and show a high degree of in-kind or fiscal support from local partners would be ranked higher than new projects or projects with lower levels of local support.

Local prioritization of projects would enable each sub-region to support local TMAs or other RTO activities that best address the needs and opportunities in their particular area. It helps to ensure that funding is distributed in a manner that carries out the RTO program mission by addressing regional equity and a balanced service delivery model.

### **Increase flexibility in valuing program investments**

Feedback received through the Strategic Plan process indicated that the current program did not provide partners with enough flexibility in the types of project outcomes they could achieve, measure, and assign value to. Grant recipients, TMAs in particular, were generally required to meet a "one size fits all" standard of showing how their project resulted in VMT reductions.



The consultant recommendation is that evaluation criteria be broadened to recognize the varying degree of local conditions (i.e. level of transit service, paid parking, bicycle and pedestrian infrastructure, etc.) may make it more difficult for some areas of the region to achieve similar levels of VMT reduction as others. This in turn will enable projects which focus primarily on raising awareness to receive funding, along with those that have the ability to measure and report reductions in VMT.

### **Improve support of local program development**

All of the above recommendations should serve to support strategies that meet the needs of the identified sub-regional partners. To further improve regional program performance, staff is recommending that local jurisdiction partners contribute a portion of local funds or provide meaningful in-kind contributions to their TMAs or other prioritized projects.

Local investments will help accomplish regional and local goals in the following ways:

- Provide resources for sub-regional and local RTO planning and program implementation
- Provide a higher level of stable funding for TMAs
- Provide stability through local coordination
- More closely align TMA work with TSP goals and other planning initiatives
- Build credibility with businesses for the work of the TMAs
- Grow business partnerships, focusing additional resources on local priorities
- Leverage regional investments to achieve locally desired outcomes
- Development or amendment of local codes to encourage business participation in TMAs (e.g. City of Beaverton permitting reduced parking requirements for businesses with TMA membership)

### **Conclusion and next steps**

These recommendations provide a means of stable support for TMAs or other local RTO program priorities. At the same time, they achieve desired improvements in program performance, better alignment with local priorities, and maintain regional program coordination to achieve strategic plan goals and objectives.

Assuming regional consensus on these recommendations, staff will continue to work with stakeholders to further develop these concepts into grant criteria and funding targets.

## Public Comments on the updated Regional Travel Options (RTO) Strategic Plan

The public participation process for updating the 2012-2017 RTO Strategic Plan allowed stakeholders and the general public to provide feedback and information on key elements of the updated plan, and meet regional and federal requirements for public participation in transportation planning and decision-making.

The comment period focused primarily on the proposed goals, objectives, policies and the overall direction of the updated RTO Strategic Plan. Comments received during the comment period will be presented to the Metro Council and JPACT for discussion before the 2012-2017 RTO Strategic Plan is considered for approval. All transportation-related actions are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration.

The public comment period on the updated 2012-2017 Regional Travel Options (RTO) Strategic Plan began Tuesday, February 21 and ended at 5 p.m., Wednesday, March 21. The draft version of the updated RTO Strategic Plan was available for download on Metro's website for the full duration of the comment period. Paper copies of the draft Strategic Plan were also available upon request. Metro asked for comments to be submitted by mail or email. In addition to providing information about the updated Draft Strategic Plan and the comment period on Metro's website, RTO staff posted a newsfeed on the Metro web page and sent emails through the Commuter Dispatch, the RTO Marketing Outreach Working Group, the RTO Subcommittee and the interested parties list.

A total of two comments were received by email during the one month public comment period—one from Heidi Guenin, Transportation Policy Coordinator from Upstream Public Health and one from Pam Wilson, Marketing Manager at TriMet. Both comments supported the overall direction of the Draft RTO Strategic Plan and the proposed adoption of new performance targets aligned with a triple-bottom-line approach to performance evaluation.

The consolidation of the grant programs has been the primary topic of discussion throughout the Strategic Plan adoption process. The primary point of concern was focused on the consultant's recommended elimination of the dedicated grant program for Transportation Management Associations (TMA) to improve program performance. To address these concerns, Metro staff gathered input from regional stakeholders and County Coordinating Committees and is looking for options to provide a means of stable support for TMAs.

**From:** Heidi [\[mailto:heidi@upstreampublichealth.org\]](mailto:heidi@upstreampublichealth.org)  
**Sent:** Tuesday, March 13, 2012 11:39 AM  
**To:** [daniel.kaempff@oregonmetro.gov](mailto:daniel.kaempff@oregonmetro.gov)  
**Cc:** Pamela Blackhorse  
**Subject:** A few questions and comments about the RTO draft plan

Hello Daniel,

I'm not sure if you're the right person to chat with about the draft plan, so please point me in the right direction if not. I'm one of the citizen members of TPAC, but I had to leave during this discussion at the February meeting.

In general, the proposed changes are heading in the right direction. Expanding performance metrics to include triple bottom line measures is an important step in connecting the RTO funds to the many goals that Metro has for the region. I'm also excited about RTO engaging more ethnically and culturally specific non-profits that are already delivering programs designed to get their clients/constituents to better understand their transportation options.

Without a deep understanding of the existing structure for TMAs, though, I do wonder how the new metrics will limit the ability of TMAs to continue to do the very important work that they do, especially in the more suburban areas of the Metro region. Is there a solution that can successfully support both TMAs and the inclusion of diverse community programs?

I also wonder how these proposed changes might benefit Safe Routes to Schools programs and infrastructure, which is what I'm hoping you can give me some more information about, Daniel. Would SR2S qualify for funds? With SR2S funding at the federal level disappearing, and with a good chance that SR2S funding will ultimately be devolved to the MPOs, how is Metro thinking about regional decision-making and funding around Safe Routes?

Thank you!



Heidi Guenin Transportation Policy Coordinator at [Upstream Public Health](http://UpstreamPublicHealth)  
[heidi@upstreampublichealth.org](mailto:heidi@upstreampublichealth.org) | office 503-284-6390 | mobile 503-841-7936

**From:** Wilson, Pam [<mailto:WilsonP@trimet.org>]  
**Sent:** Wednesday, March 21, 2012 4:03 PM  
**To:** Daniel Kaempff  
**Cc:** Pamela Blackhorse; Britton, Adriana  
**Subject:** TriMet feedback on RTO Plan

Hi, Dan,  
Hope all is great with you. Here is our feedback.  
Pam

### **TriMet Feedback for the Five-Year Strategic Plan for the Metro Regional Travel Options Program**

TriMet supports Metro's efforts in assessing the results and goals of the RTO program. The RTO program is a cost-effective program that improves the efficiency of the region's transportation infrastructure. TriMet endorses the direction of the RTO Five-year Strategic Plan to better align the program's mission with the regional vision and place greater emphasis on performance measures. During these times of reduced and competing resources, it is critical funds are used as efficiently as possible, with emphasis on return on investment

The evaluation process was comprehensive but as supplied in earlier feedback, there are several items remaining that need clarification and correction. Some of the questions on the table we presume will be clarified in the final evaluation.

TriMet's Employer Outreach program serves employers of all sizes across the region. As a participant of the RTO program, TriMet's Employer Outreach program contributed the following results as highlighted in the RTO evaluation:

- TriMet's Employer Outreach program achieved the highest vehicle miles reduced, estimated between 42,982,007 and 64,473,011.
- During the evaluation period (January 2009-June 2011), the non-SOV mode split for worksites participating in the TriMet Employer Outreach Program increased considerably from 27.1% in 2009 to 38.5% in 2011.
- 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.
- TriMet's Employer Outreach program is among the most cost-effective programs with an estimated cost per VMR of \$0.01 - \$0.02.
- The 2011 RTO awareness survey and focus groups reported 59% of residents have heard of TriMet Trip Planner, and 43% have used the Trip Planner.

TriMet's draft work plan for 2013 submitted in December 2011 incorporated early direction from the draft RTO plan and TriMet is prepared to coordinate efforts to meet the goals of the final RTO plan.

Following is our initial feedback for consideration in finalizing the plan.

Mission – we support linking mission to Metro's Making a Great Place and goals. The aspirational mission connects the "big picture" and clearly defines the overall benefit of the RTO program as it relates to the region's livability goals. Aligning the RTO goals with the Regional Transportation Plan objectives will better position RTO as an effective regional program.

#### Coordination of Roles

- TriMet is uniquely qualified and positioned to market and manage TDM programs in the region as it provides practical and effective employer-focused programming throughout the metro area and at the local level. TriMet offers TMAs and local partners technical assistance about using TriMet, ECO surveys, materials plus regional services such as the Emergency Ride Home program, transit pass program support, and promotion of events in TriMet's employer newsletter.
- The TriMet Employer Outreach staff coordinates with TMAs and RTO partners to deliver the TDM services that will address a local employer's situation. Employers expect to have a relationship with TriMet and TriMet relies on maintaining contact with the employers in the region. Our staff's in-depth knowledge of transportation resources is of great benefit when enrolling local and regional employers in transportation programs.
- The evaluation identified that some employers used services from a TMA, Metro and/or TriMet. However, the evaluation did not go further to identify the specific services provided by each partner. We are optimistic that concerns about the potential for overlapping roles can be addressed with clearly defined project plans and targeted goals among the partners, such as TMAs, as well as improved communication and 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 service 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 a better fit for a TMA with grant funding.

#### 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 the guidelines could be designed to improve grant opportunities for TMAs. This would be an effective way to provide some funding assurance and assist with transition; and is an action we would support.

#### 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.

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

March 21, 2012

[www.metro-region.org/ traveloptions](http://www.metro-region.org/traveloptions)



March 2012

# 2012-2017 Strategic Plan

REGIONAL TRAVEL OPTIONS





## **Metro** | *Making a great place*

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

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Kathryn Harrington, District 4  
Rex Burkholder, District 5  
Barbara Roberts, District 6

**Auditor**  
Suzanne Flynn



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## APPENDIX

Appendix A – Summary of Key Findings from Strategic Planning Process

Appendix B – Strategic Plan Methodology

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## CHAPTER 1 – INTRODUCTION

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



RTO Investments contribute to making a great place

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 77 and 123 million vehicle miles traveled.<sup>1</sup> At its 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 commuter travel options, grants to partners, 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:

- **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, which can then be spent in the local economy. This green dividend has been attributed to saving Metro area residents as much as \$2.6 billion per year.<sup>2</sup>
- **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.<sup>3</sup> Moreover, transportation options improve community health by improving air quality and encouraging people to participate in active transportation options.



<sup>1</sup> 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.

<sup>2</sup> Cortright, J. (2007, June 28). Portland’s Green Dividend. Chicago, Illinois: CEOs for Cities.

<sup>3</sup> Center for Neighborhood Technology. (2011). “Housing + Transportation Affordability Index” Portland-Vancouver WA. Web. Accessed November 15, 2011

## CHAPTER 2 – GUIDING PRINCIPLES & POLICY FRAMEWORK

The RTO Strategic Plan defines a mission, a set of goals and objectives, and a five-year plan to support a regional travel options program that helps to achieve regional air quality, transportation, and livability goals.

### STRATEGIC PLAN GUIDING PRINCIPLES

The Strategic Plan process was guided by the following principles that were identified during the Strategic Plan development process.

- Enable local partners to reach out to employers and residents to help make non-SOV travel choices.
- Link the RTO program to other Metro programs to proactively integrate transportation demand management into regional planning and growth management processes.
- 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.

A summary of key questions, issues, opportunities, and recommendations addressed in this Plan can be found in Appendix A.

## RTO PROGRAM MISSION AND GOALS

The 2012-2017 RTO Strategic Plan is guided by a mission statement that emphasizes the economic, social, and environmental benefits of the RTO program. The emphasis on these strengths of the RTO program enables it to more effectively support and leverage other Metro programs.

This mission is supported by the following goals and objectives.

### RTO Mission

*The mission of the RTO program is to 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.*

### RTO Goals & Objectives

**Goal 1:** Align the RTO program with regional economic development, 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.
- Objective 1.4 – Measure and evaluate the RTO program to report progress and aid policy decision-making, and to maintain or improve performance.
- Objective 1.5 – Address transportation needs in areas underserved by transit, bicycle, or pedestrian investments.

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

- Objective 2.1 – Support local jurisdictions in developing and implementing policies that support the RTO mission.
- Objective 2.2 – Support multimodal programs that meet the business and residential needs in urban centers, corridors, and suburban areas.
- Objective 2.3 – Work with local jurisdictions, businesses, and partners to build local political and staff support for transportation demand management.

**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 multimodal 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 – Support partners who have established working relationships with employers in promoting economic development with travel options tools and programs.

**Goal 4:** Develop tools to support the use of travel options to reduce drive-alone trips

- Objective 4.1 – Continue a regional collaborative marketing campaign to increase awareness of travel options and assure meaningful integration with local marketing outreach campaigns and efforts.
- Objective 4.2 – Develop and deliver enhanced and accessible traveler information tools.
- Objective 4.3 – Provide technical services to local partners to help implement and support the RTO mission.

## CHAPTER 3 – RTO PROGRAM STRUCTURE

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, the CMAQ program provides funding to states to help achieve the National Ambient Air Quality Standards (NAAQs).

The Metro RTO Program relies heavily on local partners to deliver travel options services across the region. Partners include non-profit organizations, Transportation Management Associations (TMAs), municipalities and counties, area transit agencies including TriMet and Wilsonville SMART, and state and federal agencies.

This chapter defines the roles and functions of partners who deliver RTO services and presents the funding framework that is used to guide RTO investments of CMAQ funds for the 2012-2017 strategic plan.

### PARTNER ROLES

Regional transportation demand management programs are supported by a broad range of functions; they require policy input, planning and program development, technical services, marketing, outreach, and evaluation. Defining and optimizing the roles and responsibilities in the Metro region is a key component of this Strategic Plan. This section outlines the roles and responsibilities of Metro RTO staff, transit agencies, and local partners in administering and delivering regional travel options services.

#### **Metro**

Metro is the lead agency responsible for administering RTO funds and evaluating the RTO program in the Portland Metropolitan region. As the program administrator, Metro RTO staff provide wholesale-level support to help its partners across the region deliver travel options at the local level. These efforts include:

- Playing a lead role in developing and shaping policy that supports RTO efforts.
- Ensuring that travel options services are distributed equitably throughout the region by providing direct outreach to local political leaders and local staff to build support and capacity for implementation of RTO programs at the local level.
- Creating a forum for local organizations and jurisdictions to share best practices and collaborate on implementation.
- Providing needed assistance on a fee-for-service basis, such as website development, GIS mapping tools, and other technical services, to jurisdictions and organizations with limited staffing abilities.
- Working with the Oregon Department of Transportation on delivering the collaborative Drive Less Save More state marketing campaign.
- Evaluating the program on a biennial basis to ensure it is meeting regional economic, environmental, and social equity goals.

## **Transit Agencies**

TriMet and Wilsonville SMART receive funding to support employer outreach programs. These functions are closely coordinated with the employer outreach offerings of other local partners to reduce overlap and leverage the collective efforts of RTO partners in the region.

## **Local Partners**

Local partners play a crucial role in delivering quality RTO programs in the region. These partners include local jurisdictions and counties, Transportation Management Associations, and non-profit organizations, among others. Over the years, local partners have been influential in developing innovative programs and projects to increase the awareness of travel options and have contributed to a shift in travel behavior. Local jurisdiction support is critical to implement policies and programs on the ground. TMAs are instrumental in building important relationships with the business community, and employees and non-profits have developed innovative programs to reach all segments of the population.

## **FUNDING MODEL**

To support the roles identified above, CMAQ funding for RTO-sponsored activities is distributed using a performance-based funding model with three primary channels. Metro receives approximately 30 percent of overall funding for its role in administration, oversight, and wholesale-level support. Transit Agencies receive approximately 20 percent for their role in providing the base employer outreach program. Approximately 50 percent of available funding is directed toward local partners through Metro's RTO competitive grant program.

Funding decisions are made pursuant to the RTO strategic plan mission and goals. The overall performance objective of the RTO program is to contribute to achieving the regional goal of 50 Percent Non-SOV mode split by 2035 by driving down the regional SOV rate. This is accomplished by making investments in strategic programs that result in mode-shift in the region. Recognizing there are multiple motivations for RTO partners to make these investments, the RTO performance framework utilizes a triple-bottom-line method to recognize returns. Under this model, applicants are able to pursue projects that contribute to economic development, environmental enhancement, social equity, or any combination of these important outcomes.

The process for applying for RTO funding is consolidated as part of an expanded competitive grant program that encompasses funding for TMAs, individualized marketing, and small grants. In the past, TMAs have had dedicated funding. While TMAs are still a valued asset to the RTO program, the new funding model combines TMA funding into the competitive grant funding pot. The new competitive grant program reflects the finding from the most recent biennial evaluation that TMAs have had mixed successes. While some TMA's have exceeded expectations, others have struggled. The new funding model will direct limited resources to a wider range of entities to help ensure that greater performance can be achieved across the region.

While funding priorities and funding levels may change from year to year, the process for applying for funds are governed by this Strategic Plan's goals and objectives and the funding framework

identified herein. To ensure programs are high-performing, the competitive grant process requires grant applicants to deliver a problem statement, a viable long-term business model, and demonstrated local support. The criteria for ranking grants are drawn from the goals and objectives of this strategic plan, and published separately each grant cycle.

The 2012-2017 funding model benefits the RTO program in the following ways:

- Proven local support—both monetary and political—helps align RTO efforts with local transportation system plans.
- A problem or opportunity statement required by the grantees helps the RTO program align its efforts and funding with programs that directly relate to RTO goals and regional infrastructure investments.
- Shifting commuter services to TriMet and other partners allows Metro staff to spend more time to build local capacity for travel options, develop policies that support biking, walking, and taking transit, and provide technical services to the region.

### **Summary of Changes from Previous Strategic Plans**

The 2012-2017 funding model restructures the RTO program in the following ways:

- Clarification and reassignment of roles for Metro, Transit Agencies, and the RTO subcommittee.
- Formalization of formula funding for Transit Agencies' employer outreach programs.
- 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.
- Updates to Metro's Public Private Partnership policy to eliminate dedicated funding for TMAs.





## **CHAPTER 4 – STRATEGIC PLAN IMPLEMENTATION**

Chapters 1 – 4 outline the broad policy objectives of the RTO strategic plan for the 2012 – 2017 operating period. Implementation of these objectives will require additional work on behalf of staff, partners, and local leaders to implement the new vision. It is agreed that the RTO program will continue to pursue the region’s ambitious goals for improving the use of travel options. It is also clear that this cannot be done without changes to the RTO program structure. The proposed funding model will enable the region to continue making advances in reaching regional performance targets for use of travel options. The following information provides a roadmap of the decisions and changes that will need to occur to accomplish this.

### **ONE-YEAR TRANSITION PERIOD**

It’s recognized that the recommended changes will require local partners to make adjustments to their programs in order to implement the new Strategic Plan. New or changed elements of the Strategic Plan will be phased in over the course of fiscal year 2012-2013 in order to make the transition to the new plan as seamless as possible for partners and to ensure time for a comprehensive process to further develop and implement program changes. Next steps include:

- Upon adoption of the Strategic Plan, a work group comprised of TPAC members and other stakeholders will be formed. This group will be tasked primarily with making policy recommendations and funding decisions. In addition, their input will be required during discussions regarding measurement and performance methodology.
- The work group’s initial task will be the development of grant program and project selection criteria in preparation for the 2013-2015 grant solicitation process.
- Fiscal year 2012-2013 will be the final year of the current TMA-specific funding policy before transitioning to the new competitive grant program.
- To continue the coordination and policy advisory roles played by the former RTO Subcommittee, the purpose of the existing RTO Marketing and Outreach Working Group will continue to evolve and be refined during fiscal year 2012-2013.

### **UPDATES TO PUBLIC PRIVATE PARTNERSHIP MODEL**

A significant change in the 2012-2017 Strategic Plan is the elimination of TMA-specific funding. TMAs are still eligible for funding, but this funding is now channeled through the new consolidated competitive grant program. While the role of TMAs does not change, the Funding Plan necessitates changes in the way TMAs position themselves. The elimination of Metro’s role in employer outreach while also increasing and formalizing coordination of other funded partners’ roles in employer outreach helps TMAs better define their role vis-à-vis the private sector.

## VMR METHODOLOGY

In the past, the RTO program has been guided heavily by one metric or outcome: vehicle miles reduced (VMR). Although this goal 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 a good



quantitative measure for many of these outcomes, but there is a need to define why vehicle miles reduced 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 help change travel behaviors that may not happen immediately. Therefore, it is not always appropriate to measure the VMR results of individual programs. During the transition period, Metro RTO staff will need to implement the new evaluation framework focusing on SOV mode-shift by updating grant criteria, and incorporating new performance measures into future work plans.

## PERFORMANCE MEASURES

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 2035 Regional Transportation Plan, the RTO program can articulate its performance in terms of economic, social, and environmental benefits. As described above, the previous process of relying on VMR as the primary indicator is problematic—both because it is difficult to measure accurately and because it does not speak to the community benefits of reducing vehicle miles traveled.

Non-SOV mode-shift is the principal performance measure of the RTO program. This performance measure is framed with a direct linkage to the RTP, and includes a targeted contribution specifically for the RTO program.

**Non-SOV mode-split is the RTO Program’s primary performance measure.**

*The RTO Program will help the region achieve its goal of a 50% non-SOV mode split by 2035 by achieving a 0.1 % increase per year attributable to the RTO program between 2012-2017.*

Figure 1 below provides examples for how non-SOV mode split can be converted into meaningful metrics for communicating benefits in terms of the triple-bottom-line framework.

**Figure 1 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"> <li>• Convert non-SOV trips into household cost savings and dollars returned to local economy.</li> <li>• Convert non-SOV trips into number of parking spaces reduced and multiply by the average cost of parking to demonstrate direct economic savings.</li> </ul>
Social Benefits	<ul style="list-style-type: none"> <li>• Use Active Transportation proportion of non-SOV trips to measure improvements in health.</li> <li>• 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.</li> </ul>
Environmental Benefits	<ul style="list-style-type: none"> <li>• Convert non-SOV trips into VMR and multiply by standard emission rates per VMR to calculate emission savings for specific pollutants.</li> </ul>

## EVALUATION

Evaluation is an important component of the RTO program to ensure grant funding is being spent effectively and measures are in place to track performance towards regional mode share goals. As described above, although VMR is one indicator to show the achievement of RTO efforts, it is not an easy metric to track, nor is it necessarily an accurately calculated performance measure. The RTO evaluation process now aligns program investment decisions with the new performance measures identified above. However, the majority of individual recipients will not be required to track or estimate their specific outcomes (i.e., direct contributions to the key performance measures), but instead, demonstrate how their funded activities are tied to the performance measures. This can be accomplished by requiring recipients to identify this relationship as part of their application and report on precursors that are known to contribute to the advancement of the performance measure.

As part of the recommended funding model, recipients will select from a menu of indicators that they will track pursuant to the performance measures their project is designed to achieve. At the most basic level, these precursor indicators include direct program outputs such as number of advertisements, number of maps produced, number of meetings attended, and so forth. Requiring a slightly higher level of evaluation, intermediary precursors include, awareness, participation, and satisfaction. At the highest level of evaluation is direct measurement of the desired outcome. The expected level of reporting is based on how much funding is sought, with an increasing level of reporting for higher levels of funding (see Figure 2).

**Figure 2 Recommended Reporting Requirements**

Funding Level	Reporting Requirements	Notes
Low	Outputs	Recipients of small grants will not be required to report on outcomes.
Medium	Outputs, Awareness, and Participation	Recipients of medium-sized grants will be expected to conduct more rigorous evaluation, stopping short of estimating outcomes.
High	Outputs, Awareness, Participation, Satisfaction, and Outcomes (where appropriate)	Recipients of large grants will be required to conduct even more rigorous evaluation including, when appropriate, estimates of direct and indirect impacts on the relevant performance measures.

**SELECTION CRITERIA**

The current selection criteria used for Metro’s small grant program will serve as a starting point for defining selection criteria for the consolidated grant program. The primary modification that will 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.

**ELIGIBILITY**

Suggested eligibility for competitive grants is determined as follows:

- Does the proposed investment contribute to increasing use of non-SOV modes? This is established through a written project narrative that provides a logical explanation demonstrating how the funded efforts will contribute to reducing non-SOV modes, identifying specific performance targets for each investment.
- Does the applicant demonstrate interest and willingness? This is established through a written project narrative that identifies the specific opportunity or problem to which the applicant is responding.
- Does the applicant have local support? Minimum match requirements are used as base-level eligibility criteria. The minimum level is set at CMAQ thresholds. Higher local match levels are higher-risk efforts or rewarded through extra points in the scoring process.
- Does the applicant have the capacity to implement? This is determined based on the applicant's demonstration of a viable long-term business model.

## CONTRACTED REPORTING REQUIREMENTS

The evaluation process revealed opportunities for the Metro RTO program to improve its contracting, reporting, and evaluation processes. In the past, the reporting, invoicing, and evaluation process lacked a clear linkage between RTO Program and Metro goals, contract requirements, invoice requirements, and evaluation requirements. The Metro RTO Program now relies on a standardized system for contracting, invoicing, and reporting that relates to the evaluation framework proposed by Portland State University researchers in prior evaluations (documentation of this is available as part of the prior 2008 – 2013 Strategic Plan). Furthermore, the Metro RTO program has adopted thresholds based on program type and funding level for which higher-level reporting and evaluation is required (described above).

The reporting and evaluation process reinforces 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 3 below illustrates how this feedback loop ties the evaluation framework back to the RTO goals.

**Figure 3 Relationships among RTO Goals, Performance Measures, Reporting, and Evaluation**



## RTO SUBCOMMITTEE

The RTO Subcommittee will be restructured. The committee’s funding decision-making function is being divided from its collaborative functions and these functions are planned to be performed separately. This is so that funding decisions are not made by a committee that is comprised largely of direct grantees. During the one-year transition period, Metro will work toward reassigning 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, the RTO program will continue convening and facilitating meetings of RTO grant recipients on a regular basis to coordinate programs and service delivery, facilitate information sharing, and disseminate best practices.

**APPENDIX A: SUMMARY OF KEY QUESTIONS, ISSUES AND OPPORTUNITIES, AND RECOMMENDATIONS**

	Key Questions	Issues & Opportunities	Recommendations
Mission, Goals & Objectives	<ul style="list-style-type: none"> <li>What outcomes should the RTO program strive to achieve?</li> <li>How can the RTO program be more closely aligned with other Metro investments?</li> </ul>	<p><b>Issues</b></p> <ul style="list-style-type: none"> <li>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, these contributions are not well-articulated in the regional transportation policy and planning discourse.</li> <li>The singular Vehicle Miles Reduced (VMR) performance target results in missed opportunities for the RTO program to demonstrate its contributions to other important outcomes.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Link RTO program to other Metro programs by articulating goals that reflect and build on goals defined in the RTP.</li> <li>RTO Program evaluation framework is well-advanced and can help RTO play a leadership role in performance-based planning.</li> </ul>	<ul style="list-style-type: none"> <li>Adopt a new mission statement that reflects RTO's contribution to making the region a great place.</li> <li>Adopt new performance targets aligned with a triple-bottom-line approach to performance evaluation.</li> <li>Integrate triple-bottom-line performance measures into the existing evaluation methodology developed by Portland State University.</li> </ul>
Evaluation	<ul style="list-style-type: none"> <li>What performance measures should be used to track performance relative to new goals?</li> <li>How should the evaluation framework be modified to respond to the changing landscape and emerging opportunities?</li> </ul>	<p><b>Issues</b></p> <ul style="list-style-type: none"> <li>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.</li> <li>Singular VMR target and return on investment methodology skews performance measurement.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Good to Great: While some RTO-funded programs face 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.</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>Align level of evaluation and reporting effort with funding level and program type.</li> <li>Express RTO goals through evaluation criteria, RTO recipients' work plans, invoice and reporting requirements, and two-year evaluations.</li> </ul>
Roles & Actors	<ul style="list-style-type: none"> <li>What roles and functions should Metro and its partners play in delivering regional RTO programs?</li> <li>What functional changes are needed to respond to the changing landscape and new opportunities?</li> </ul>	<p><b>Issues</b></p> <ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>The effectiveness of the RTO Subcommittee is reduced because of its conflicting roles as both a funding decision-making entity and a collaborative forum.</li> <li>Regional collaboration is important in the delivery of services.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>More clearly defined roles can improve the efficiency of the RTO program by reducing redundancy.</li> <li>Separating the RTO subcommittee into distinct parts has the potential to improve both the decision-making and collaborative processes.</li> </ul>	<ul style="list-style-type: none"> <li>Focus Metro staff resources to: (1) support local jurisdictions, TMAs, and other organizations that promote travel options; (2) serve as a regional liaison to share best practices and develop regional policy that supports travel options; and (3) provide technical services to support local partners (mapping, website, surveys, etc.).</li> <li>Support TMAs, local jurisdictions, and TriMet in leading direct outreach at the local level</li> <li>Divide RTO subcommittee roles; funding decisions should be separated from RTO collaborative functions.</li> </ul>
Prioritization of Funding	<ul style="list-style-type: none"> <li>Given the issues and opportunities on the horizon, how should funding be prioritized during the next five-year planning period?</li> <li>What organizational, policy, and institutional framework is needed to deliver the desired outcomes?</li> <li>What specific changes need to be made to the existing policy for public private partnerships (TMAs)?</li> </ul>	<p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Reduced availability of funding brought on by on-going economic recession.</li> <li>The RTO program—like many other regional programs—faces the conflicting objective of providing for regional equity while also demonstrating performance.</li> <li>Not all TMAs have achieved private sector support as originally envisioned when the Public Private Partnership policy was enacted.</li> <li>TMA booster funding is serving more of a formula funding function than the intended performance-based function.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Provide a streamlined funding structure to ensure limited funding is dedicated to effective investments while building local capacity.</li> <li>Increase the proportion of funding available for grants by clarifying roles, reducing redundancy, and improving effectiveness.</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> <li>Establish formula funding for employer outreach with specific performance requirements.</li> <li>Reduce Metro's total administrative budget for RTO and direct proportionally more funding toward grants.</li> <li>Eliminate TMA-specific funding and shift TMA program administration funding to support RTO grant recipients with technical services.</li> </ul>

## APPENDIX B: STRATEGIC PLAN METHODOLOGY

### METHODOLOGY

The 2012-2017 Metro RTO strategic plan was developed through a multi-faceted outreach and analytical process 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.
- 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.
- 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.
- Biennial Performance Evaluation: A biennial performance evaluation was conducted to assess the performance of Metro RTO-funded programs.

**Figure 1 Metro RTO Strategic Plan Process**



Documentation of these materials can be obtained from Metro RTO staff by contacting the Metro Transportation Planning Division at 503-797-1735, or by email at [trans@oregonmetro.gov](mailto:trans@oregonmetro.gov).

# 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'<sup>1</sup> 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
- RTO mission is very aligned with Metro's mission in the Portland area – compact communities, travel options, etc.

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<sup>1</sup> "Reviewers" refers to the authors of this memorandum.



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

**Metro Regional Travel Options 2012-2017 Strategic Plan  
Metro RTO**

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

## 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 DLSM 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)
    - 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,<sup>1</sup> 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%.<sup>2</sup> 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.

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

<sup>2</sup> 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.<sup>3</sup> Although energy price forecasts are highly uncertain,<sup>4</sup> 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 14<sup>th</sup> highest in the nation.<sup>5</sup>

### 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.<sup>6</sup> 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.<sup>7</sup>

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<sup>3</sup> 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](http://www.eia.gov/dnav/pet/pet_pri_gnd_a_epmr_pte_dpgal_w.htm)

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

<sup>5</sup> 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>

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

<sup>7</sup> 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](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.<sup>8</sup> 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.<sup>9</sup>

## 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.<sup>10</sup>

## 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;<sup>11</sup> while another study reported that 40% of mobile phone users own a smartphone.<sup>12</sup> The use of smartphones is expected to continue to increase in the next five years.

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

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

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

<sup>10</sup> 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](http://www.afdc.energy.gov/afdc/vehicles/electric_benefits.html)

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

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

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%).<sup>13</sup> 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.<sup>14</sup>

## 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.<sup>15</sup> Between 1980 and 1990, the Hispanic population in Oregon increased by 71%; between 1990 and 2000, the population increased by a marked 144%.<sup>16</sup>

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<sup>13</sup> 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](http://www.surgeongeneral.gov/library/obesityvision/obesityvision_factsheet.html)

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

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

<sup>16</sup> 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](http://www.oregon.gov/DAS/OEA/docs/demographic/OR_pop_trend2010.pdf)

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.

# 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

## Metro Regional Travel Options 2012-2017 Strategic Plan

### Metro RTO

2011.<sup>1</sup> 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 \$5.4 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 27.1% in 2009 to 38.5% in 2011.
- In its fifth year, the Drive Less Save More campaign helped 222,000 people to reduce their car trips.
- 51% of adults in the region recalled seeing, reading, or hearing a message about reducing car trips.
- The TMAs worked with over 70,000 employees, 40,000 of their commute patterns are captured by ECO survey data.
- 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 RTO Travel and Awareness survey based on a recommendation in the 2007-2008 evaluation. The regional 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.<sup>2</sup>
- As a result of 2009-2011 Metro RTO investments, an estimated 83-123 million vehicle miles were reduced.<sup>3</sup>

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

<sup>2</sup> However, data is not yet available for these programs: Discover Wilsonville and Gresham Civic Drive individualized marketing campaigns.

<sup>3</sup> A low and high vehicle miles reduced (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%.

## **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 **for the fiscal years '09/'10 and '10/'11** evaluation period, including total RTO funds, the percent of total RTO funds, and local matching funds where applicable. Metro core programs accounted for 51% of total RTO funds, Drive Less Save More funds accounted for 17%, TMAs for 12%, individualized marketing for 12%, and travel options grants for 9%.

Metro Regional Travel Options 2012-2017 Strategic Plan

Metro RTO

Figure 1 Metro RTO expenses, Fiscal Years 2009/2010 and 2010/2011

Organization/Program	Total RTO Funds (FY 09/10 & 10/11)	Percent of RTO Funds	Local Matching Funds (FY 09/10 & 10/11)	Total Expenditures (FY 09/10 & 10/11)
<b>RTO Core Program</b>	<b>\$2,738,768</b>	<b>50.7%</b>	<b>\$223,192</b>	<b>\$2,961,959</b>
Metro - Collaborative Marketing - Bike There! map	\$111,169	2.1%	\$4,095	\$115,265
Metro - Collaborative Marketing - Walk There! guidebook	\$65,201	1.2%	\$5,497	\$70,698
Metro - Collaborative Marketing and Information tools	\$14,733	0.3%	\$1,686	\$16,419
Metro - Collaborative Marketing General	\$218,663	4.0%	\$4,472	\$223,136
Metro - Commuter Services	\$12,181	0.2%	\$1,394	\$13,576
Metro - General Administration	\$61,666	1.1%	\$7,058	\$68,724
Metro - Individualized Marketing (residential outreach)	\$56,588	1.0%	\$6,477	\$63,064
Metro - Regional Evaluation and Measurement	\$155,715	2.9%	\$17,822	\$173,537
Metro - Rideshare - CarpoolMatchNW Employer Outreach	\$363,937	6.7%	\$0	\$363,937
Metro - Rideshare - Regional Vanpool program	\$341,270	6.3%	\$24,215	\$365,485
Metro - RTO Grant Program Administration	\$151,246	2.8%	\$17,311	\$168,556
Metro - RTO Subcommittee Administration	\$76,656	1.4%	\$8,774	\$85,430
Metro - Sponsorships	\$43,000	0.8%	\$4,922	\$47,922
Metro - TMA Administration	\$115,479	2.1%	\$13,217	\$128,696
Metro - Vámonos!	\$42,768	0.8%	\$2,270	\$45,037
SMART/Wilsonville Employer Outreach Program	\$126,499	2.3%	\$14,478	\$140,977
TriMet Employer Outreach Program	\$781,997	14.5%	\$89,503	\$871,500
<b>Drive Less Save More (ODOT funds)</b>	<b>\$912,811</b>	<b>16.9%</b>	<b>\$1,118,200</b>	<b>\$2,031,011</b>

**Metro Regional Travel Options 2012-2017 Strategic Plan**

Metro RTO

<b>Organization/Program</b>	<b>Total RTO Funds (FY 09/10 &amp; 10/11)</b>	<b>Percent of RTO Funds</b>	<b>Local Matching Funds (FY 09/10 &amp; 10/11)</b>	<b>Total Expenditures (FY 09/10 &amp; 10/11)</b>
<b>Downtowns and centers</b>	<b>\$529,626</b>	<b>9.8%</b>	<b>\$314,969</b>	<b>\$844,595</b>
Clackamas TMA	\$99,786	1.8%	\$57,009	\$156,795
Gresham Regional Center TMA	\$94,776	1.8%	\$54,345	\$149,121
Lloyd TMA	\$76,515	1.4%	\$55,145	\$131,660
South Waterfront TMA	\$53,501	1.0%	\$28,409	\$81,910
Swan Island TMA	\$101,733	1.9%	\$61,021	\$162,754
WTA TMA	\$103,315	1.9%	\$59,039	\$162,355
<b>Individualized Marketing</b>	<b>\$786,003</b>	<b>13.5%</b>	<b>\$782,803</b>	<b>\$1,514,445</b>
Gresham Civic Drive Station	\$100,000	1.9%	\$30,000	\$130,000
Individualized marketing training	\$18,749	0.3%	\$2,146	\$20,895
Portland Green Line SmartTrips	\$300,000	5.6%	\$451,539	\$751,539
Portland SmartTrips N/NE (in progress)	\$6,040 <sup>1</sup>	0.1%	\$283	\$6,323
Portland SmartTrips N/NW	\$200,000	3.7%	\$307,405	\$507,405
Wilsonville, Discover Wilsonville	\$106,853	2.0%	\$21,430	\$128,283
<b>Travel Options Grants</b>	<b>\$490,224</b>	<b>9.1%</b>	<b>\$396,610</b>	<b>\$886,833</b>
BTA Bike Commute Challenge	\$25,000	0.5%	\$57,625	\$82,625
City of Gresham way-finding signage	\$50,000	0.9%	\$18,099	\$68,099
City of Portland Sunday Parkways	\$30,000	0.6%	\$3,434	\$33,434
City of Tigard bike map	\$16,568	0.3%	\$16,568	\$33,136
Community Cycling Center barriers to bicycling	\$78,625	1.5%	\$22,151	\$100,776
Gresham bike helmet and bike racks (07/08 grant)	\$0		\$0	\$0

**Metro Regional Travel Options 2012-2017 Strategic Plan**

Metro RTO

Organization/Program	Total RTO Funds (FY 09/10 & 10/11)	Percent of RTO Funds	Local Matching Funds (FY 09/10 & 10/11)	Total Expenditures (FY 09/10 & 10/11)
Lloyd TMA Lloyd Links	\$41,445	0.8%	\$41,445	\$82,890
PSU bike parking	\$50,000	0.9%	\$5,722	\$55,722
Swan Island TMA Trip Not Taken	\$24,130	0.4%	\$20,772	\$44,902
TriMet bike parking at Beaverton Transit Center	\$2,244	0.0%	\$673	\$2,917
TriMet multi-modal trip planner open-source programming	\$69,107	1.3%	\$88,867	\$157,974
Wilsonville SMART bike/pedestrian coordinator	\$50,105	0.9%	\$61,829	\$111,934
WTA bike rack installation	\$15,000	0.3%	\$1,800	\$16,800
WTA Carefree Commuter Challenge	\$38,000	0.7%	\$57,625	\$95,624
<b>TOTAL</b>	<b>\$5,457,432</b>	<b>100.0%</b>	<b>\$2,865,772</b>	<b>\$8,268,843</b>

Source: Budget information provided by Metro RTO staff

<sup>1</sup> City of Portland SmartTrips N/NE program budget is \$171,520; only \$6,040 was paid out during the evaluation period, matched by \$283. The total budget \$171,520 budget is used from this point forward.

## 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**. To be consistent with prior evaluations, the ECO survey data is used to calculate VMR for employers working with TMAs, SMART, and TriMet. However, the ECO survey VMR calculation relies on the change in mode-**split in an employers’ baseline and** follow-up survey. In most cases, baseline surveys were taken in years prior to this investment period (i.e. prior to January 2009). Therefore, the return on investment in the current investment period is being compared to a change in mode split over a period – in many cases – that is much longer than the investment period. In future evaluations we recommend separating VMR accrued during the investment period from VMR accrued during earlier investment periods.

### Evaluation Matrix


Figure 2 provides a high level evaluation of the Metro RTO programs funded during the 2009-2011 **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.



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Figure 2 Evaluation Matrix of Metro RTO Funded Programs, FY '09/10-'10/'11

Organization/Program	Total RTO Funds (FY 09/10 & 10/11)	Percent of RTO Funds	Did Program Meet Contract Goals?	2Year Investment Period VMR (Low Estimate) <sup>1</sup>	2 Year Investment Period VMR (High Estimate) <sup>2</sup>	Cost per VMR (Metro Investment Only)
<b>RTO Core Program</b>	<b>\$ 2,738,768</b>	<b>50.7%</b>				
Metro - Collaborative Marketing - Bike There! map	\$111,169	2.1%	n/a	n/a	n/a	n/a
Metro - Collaborative Marketing - Walk There! guidebook	\$65,201	1.2%	n/a	n/a	n/a	n/a
Metro - Collaborative Marketing and Information tools	\$14,733	0.3%	n/a	n/a	n/a	n/a
Metro - Collaborative Marketing General	\$218,663	4.0%	n/a	n/a	n/a	n/a
Metro - Commuter Services	\$12,181	0.2%	n/a	n/a	n/a	n/a
Metro - General Administration	\$61,666	1.1%	n/a	n/a	n/a	n/a
Metro - Individualized Marketing (residential outreach)	\$56,588	1.0%	n/a	n/a	n/a	n/a
Metro - Regional Evaluation and Measurement	\$155,715	2.9%	n/a	n/a	n/a	n/a
Metro - Rideshare - CarpoolMatchNW Employer Outreach	\$363,937	6.7%	n/a	13,043,506	19,565,260	n/a
Metro - Rideshare - Regional Vanpool program	\$341,270	6.3%	n/a	3,804,307 <sup>3</sup>	3,804,307 <sup>4</sup>	\$0.09
Metro - RTO Grant Program Administration	\$151,246	2.8%	n/a	n/a	n/a	n/a
Metro - RTO Subcommittee Administration	\$76,656	1.4%	n/a	n/a	n/a	n/a
Metro - Sponsorships	\$43,000	0.8%	n/a	n/a	n/a	n/a
Metro - TMA Administration	\$115,479	2.1%	n/a	n/a	n/a	n/a
Metro - Vámonos!	\$42,768	0.8%	n/a	n/a	n/a	n/a
SMART/Wilsonville Employer Outreach Program	\$126,499	2.3%		863,918	1,295,877	\$0.10-\$0.15

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Organization/Program	Total RTO Funds (FY 09/10 & 10/11)	Percent of RTO Funds	Did Program Meet Contract Goals?	2Year Investment Period VMR (Low Estimate) <sup>1</sup>	2 Year Investment Period VMR (High Estimate) <sup>2</sup>	Cost per VMR (Metro Investment Only)
TriMet Employer Outreach Program	\$781,997	14.5%		34,385,606	51,578,409	\$0.01-\$0.02
<b>Drive Less/Save More outreach (ODOT funds)</b>	<b>\$912,811</b>	<b>16.9%</b>				
<b>Downtowns and centers</b>	<b>\$529,626</b>	<b>9.8%</b>				
Clackamas TMA	\$99,786	1.8%		n/a	n/a	n/a
Gresham Regional Center TMA	\$94,776	1.8%		600,822	901,232	\$0.11-\$0.16
Lloyd TMA	\$76,515	1.4%		3,075,416	4,613,123	\$0.01-\$0.02
South Waterfront TMA	\$53,501	1.0%		n/a	n/a	n/a
Swan Island TMA	\$101,733	1.9%		n/a	n/a	n/a
WTA TMA	\$103,315	1.9%		4,280,155	6,420,232	\$0.01-\$0.02
<b>Individualized Marketing</b>	<b>\$ 731,642</b>	<b>13.5%</b>				
Gresham Civic Drive Station	\$100,000	1.9%	TBD	TBD	TBD	TBD
Individualized marketing training	\$18,749	0.3%	n/a	n/a	n/a	n/a
Portland Green Line SmartTrips	\$300,000	5.6%		15,713,667	23,570,500	\$0.01-\$0.02
Portland N/NE SmartTrips	\$6,040	0.1%	TBD	TBD	TBD	TBD
Portland SmartTrips N/NW	\$200,000	3.7%		6,605,992	9,908,882	\$0.02-\$0.03

**Metro Regional Travel Options 2012-2017 Strategic Plan**

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Organization/Program	Total RTO Funds (FY 09/10 & 10/11)	Percent of RTO Funds	Did Program Meet Contract Goals?	2Year Investment Period VMR (Low Estimate) <sup>1</sup>	2 Year Investment Period VMR (High Estimate) <sup>2</sup>	Cost per VMR (Metro Investment Only)
Wilsonville, Discover Wilsonville	\$106,853	2.0%	TBD	TBD	TBD	TBD
<b>Travel Options Grants</b>	<b>\$ 490,224</b>	<b>9.1%</b>				
BTA Bike Commute Challenge	\$25,000	0.5%	●	847,265	847,265	\$0.03
City of Gresham way-finding signage	\$50,000	0.9%	●	n/a	n/a	n/a
City of Portland Sunday Parkways	\$30,000	0.6%	●	n/a	n/a	n/a
City of Tigard bike map	\$16,568	0.3%	TBD	n/a	n/a	n/a
Community Cycling Center barriers to bicycling	\$78,625	1.5%	●	n/a	n/a	n/a
Gresham bike helmet and bike racks (07/08 grant)	\$0	0%	●	n/a	n/a	n/a
Lloyd TMA Lloyd Links	\$41,445	0.8%	●	n/a	n/a	n/a
PSU bike parking	\$50,000	0.9%	●	n/a	n/a	n/a
Swan Island TMA Trip Not Taken	\$24,130	0.4%	●	n/a	n/a	n/a
TriMet bike parking at Beaverton Transit Center	\$2,244	0.0%	●	n/a	n/a	n/a
TriMet multi-modal trip planner open-source programming	\$69,107	1.3%	●	n/a	n/a	n/a
Wilsonville SMART bike/pedestrian coordinator	\$50,105	0.9%	TBD	n/a	n/a	n/a
WTA bike rack installation	\$15,000	0.3%	●	n/a	n/a	n/a
WTA Carefree Commuter Challenge	\$38,000	0.7%	●	n/a	n/a	n/a
<b>TOTAL</b>	<b>\$ 5,403,071</b>	<b>100.0%</b>		<b>83,220,654</b>	<b>122,505,087</b>	

<sup>1,2</sup> A 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%.

<sup>3,4</sup> Vehicles miles reduced by vanpools was estimated from vanpool rider data including the distance of vanpool trips. Some vanpoolers likely commute to employments sites that also conduct ECO surveys. Since ECO surveys are the basis for the other VMR estimates, some double counting may occur.

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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, as shown in Figure 1 on page D-4. 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 N/NE). 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, transportation system improvements, 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	2 Year Investment Period VMR (Low Estimate)	2 Year Investment Period VMR (High Estimate)	Cost per VMR
TriMet Employer Outreach	15%	\$781,997	34,385,606	51,578,409	\$0.01-\$0.02
Clackamas Regional Center TMA	9%	\$99,786	n/a	n/a	n/a
Gresham Regional Center TMA		\$94,776	600,822	901,232	\$0.-\$0.16
Lloyd TMA		\$76,515	3,075,416	4,613,123	\$0.01-\$0.02
South Waterfront		\$53,501	n/a	n/a	n/a
Swan Island TMA		\$101,733	n/a	n/a	n/a
WTA		\$103,315	4,280,155	6,420,232	\$0.01-\$0.02

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Program Name	% of Metro RTO Budget	Metro Investment	2 Year Investment Period VMR (Low Estimate)	2 Year Investment Period VMR (High Estimate)	Cost per VMR
City of Gresham Civic Drive	14%	\$100,000	TBD	TBD	TBD
City of Portland Green Line		\$300,000	15,713,667	23,570,500	\$0.01-\$0.02
City of Portland SmartTrips NNW		\$200,000	6,605,922	9,908,882	\$0.02-\$0.03
City of Portland SmartTrips N/NE		\$171,520	TBD	TBD	TBD
Wilsonville Discover Wilsonville		\$222,480	TBD	TBD	TBD

Source: Budget numbers provided by Metro RTO staff; VMR calculations for TMAs and TriMet are taken from ECO survey data provided by Metro RTO staff; VMR calculations for Individualized Marketing programs provided by the City of Portland.

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 34 and 52 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 300,411 to 450,616 VMR annually at a cost between \$0.08-\$0.14 per VMR; employers surveyed as part of the Swan Island TMA actually increased in VMT.<sup>4</sup>

Individualized marketing programs account for 14% of the RTO program budget and have proven to be cost-effective programs 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 Green Line and N/NW projects yielded substantial VMR for a low cost of \$0.01-\$0.04 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. The TriMet Outreach program serves organizations of all sizes throughout the region with transportation program assistance, transit pass programs and surveying for Oregon DEQ ECO compliance.

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<sup>4</sup> The Swan Island increase in VMT is minimal. It 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.

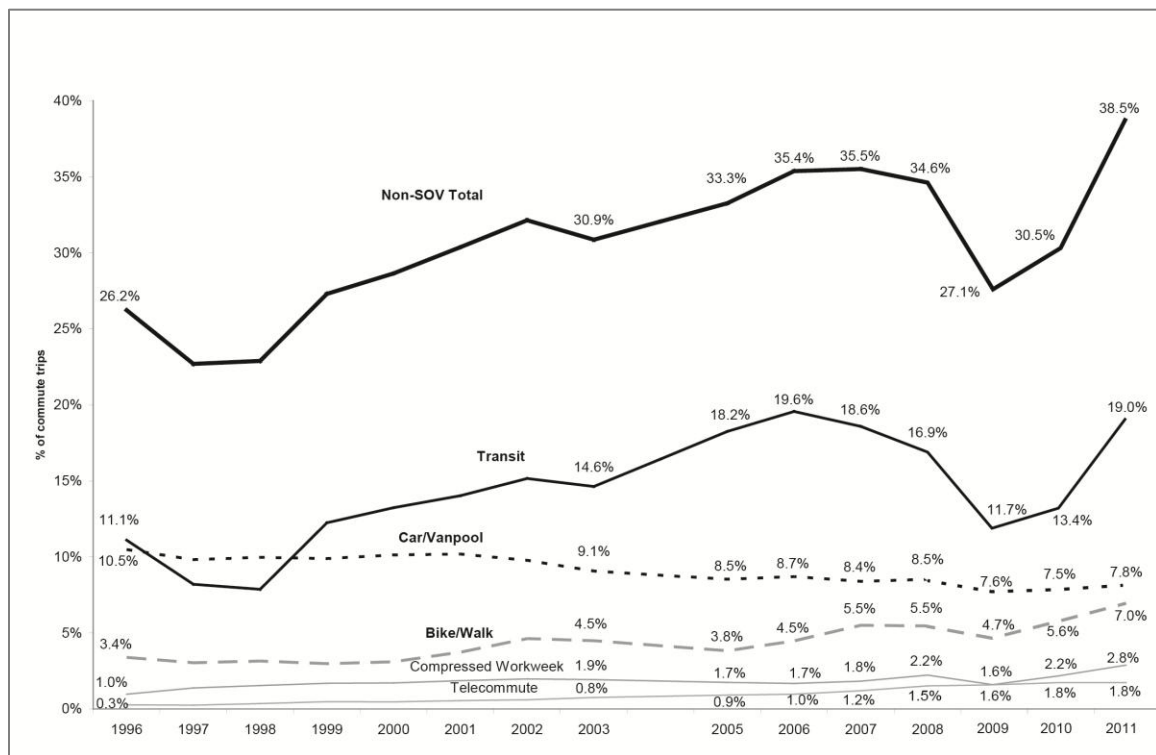
## Metro Regional Travel Options 2012-2017 Strategic Plan

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TriMet staff promotes all non-SOV commute options including transit, carpooling, vanpooling, biking, walking, compressed workweeks, telecommuting and incentives. Programs and activities include education programs such as assistance with transportation program plans, individual consultations, presentations, transportation fairs, and individual training for transportation coordinators. TriMet also offers transportation surveys, an emergency ride home incentive program, travel options materials, comprehensive website content and formalized fare programs, and carpool maps (geocoding).

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%).

**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. The dip in all modes in 2009 may be attributable to economic fluctuations, gas prices, transit fares and a variety of other factors. Nationally, the non-SOV mode split decreased by 1%.

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**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 9% of total Metro RTO funding.**

As of June 2011, Metro-funded TMAs worked with over 70,000 employees including 127 ECO-surveyed worksites included in this analysis, reflecting the commute pattern of more than 35,000 employees.<sup>5</sup> 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) availability of free parking; (2) limited private sector support; (3) difficulty demonstrating value to the private sector due to overlap of services provided by Metro, SMART, and TriMet; and (4) lack of bike and transit infrastructure.

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** average annual investment and estimated annual VMR.<sup>6</sup> 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 Rules were instituted in Oregon.

<sup>5</sup> 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.

<sup>6</sup> Note: Annual VMR estimates are listed in Figure 6 instead of "2.5 year investment period" VMR numbers as shown in Figures 2 and 3 that calculated the VMR during the entire investment period. Annual numbers are listed here to assess whether or not the TMAs met their goal of either 1 million or 1.5 million VMR based on the grants they received.

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**Figure 6 TMA Detailed Evaluation, Annual Performance**

TMA	# of Staff (FTE) <sup>1</sup>	Local Funding Support <sup>2</sup>	# of Surveyed Worksites	# of Worksites also in Contact w/ TriMet	# Employees at Surveyed Worksites	Average Annual Metro Investment <sup>3</sup>	Annual VMR (Low Estimate)	Annual VMR (High Estimate)	Cost per VMR <sup>4</sup>
Gresham	1.5	Low	7	7	1,537	\$47,388	300,411	450,616	\$0.11 - \$0.16
Lloyd	5	High	68	8	12,017	\$38,258	1,537,708	2,306,561	\$0.01 - \$0.02
South Waterfront	2	Medium	n/a	n/a	n/a	\$42,883	n/a	n/a	n/a
Swan Island	1.5	Medium	12	8	2,334	\$50,867	n/a	n/a	n/a
WTA	1.5	Medium	40	23	19,573	\$51,658	2,140,077	3,210,116	\$0.01 - \$0.02

<sup>1</sup> The total number of FTE at each site does not necessarily work on RTO-related strategies. Lloyd staff work on additional commute options assistance programs with private funds (non-RTO); 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.

<sup>2</sup> 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

<sup>3</sup> Average = RTO's average annual TMA investment for the '09/'10 and '10/'11 investment period.

<sup>4</sup> 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 where TMAs and TriMet are working collaboratively but may also indicate areas of overlap and opportunities for efficiency. For example, 100% of employers working with the Gresham TMA were also in contact with TriMet. Those TMAs with the highest percentage of collaboration or overlap with TriMet were also the most expensive per VMR (Gresham and Swan Island). While other factors influence cost per VMR, potentially overlapping roles and the variable performance of TMAs were 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.

In the 2009-2010 evaluation period, Metro funded five IM programs, accounting for over 14% of the total Metro RTO budget: (1) Gresham Civic Drive; (2) Portland SmartTrips Green Line; (3) Portland SmartTrips NNW; (4) Portland N/NE; 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 N/NE, and **Discover Wilsonville had not completed their "after" surveys and therefore no VMR or cost per VMR analysis is available.**

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**Figure 7 Individualized Marketing Return on Investment, 2009-2011**

Program	Metro Investment	Households	Residents <sup>1</sup>	VMR (Low)	VMR (High)	Cost per VMR
Gresham Civic Drive	\$100,000	3,000	7,470	TBD	TBD	TBD
Portland SmartTrips Green Line	\$300,000	27,684	68,933	15,713,667	23,570,500	\$0.01-\$0.02
Portland SmartTrips NNW	\$200,000	31,000	771,790	6,605,922	9,908,882	\$0.02-\$0.03
Portland SmartTrips N/NE	\$171,520	23,000	57,270	TBD	TBD	TBD
Discover Wilsonville	\$22,480	7,185	17,891	TBD	TBD	TBD
<b>Total</b>	<b>\$794,000</b>	<b>91,869</b>	<b>923,354</b>	<b>22,319,589</b>	<b>33,479,382</b>	

<sup>1</sup>Note: Number of residents estimated using the Census “persons per household, 2005-2009” estimate for Oregon of 2.49.

During the evaluation period, individualized marketing programs reached over 90,000 households, 923,000 residents and accounted for between 22 and 33 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.

#### 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.

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- 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 promoted through other regional programs, such as Bike Commute Challenge, Drive Less Save More, Sunday Parkways, and area TMAs.
- Free copies of the Bike There! map were distributed to low-income and youth audiences through community organizations, such as Community Cycling Center and Safer Routes to Schools.
- Bike There! map is available for **viewing on Metro's** website.
- Free English and Spanish Bike There! Quick Guides (maps zoomed in on local areas) were distributed at events. Bike There! web pages translated into Spanish.
- 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.
- Walk There! walks and web pages translated into Spanish.
- Walk There! books distributed to free for low-income audiences through Centro Cultural and Adelante Mujeres.
- Walking advertising campaign ran in Spanish during summer 2011.

### 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. (DLSM) 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:

- Built 1/3 awareness of the campaign in the Portland Metro area.
- 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

### Regional Vanpool Program

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

### CarpoolMatchNW

CarpoolMatchNW.org 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. As of June 2011, the online ridesharing system had approximately 12,000 members. In June 2011, CarpoolMatchNW.org transitioned to DriveLessConnect.com powered by DriveLessSaveMore.com.

### 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 sometimes require vanpool and carpool services, are often outside of good transit service areas, or have shift workers who arrive or leave when transit service is unavailable.

Key accomplishments during the evaluation period include:

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

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from the average baseline survey, however the carpool mode split decreased from 11% to 9% (see Figure 8).

**Figure 8 2009-2011 Commute Trip Mode Share for Metro RTO Worksites**

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	76%	64%	-12
Transit	9%	16%	7
Bike	4%	7%	3
Carpool	11%	9%	-2
Comp Work Week	1%	2%	1
Telecommute	1%	2%	1
# Worksites = 67 # Eco Eligible Employees = 34,855 VMR (2 years) = 13,043,506 – 19,565,260			

### 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 more than 100 employees to provide commute options for employees. Employers are expected to survey employees every two years for ECO Rules or other reasons. The TriMet employer outreach program serves organizations of all sizes throughout the region with transportation program assistance, transit pass programs and surveying for DEQ compliance. The TriMet employer outreach program includes the following components:

- **Emergency Ride Home (ERH):** TriMet offers the emergency ride home program to incentivize employers in the region to provide non-commute subsidy programs to employees. 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 offered to all employers who request them. These kits contain information on all transportation options and are branded with the regional campaign message, Drive Less Save More.
- **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 Vanpool Shuttle Program:** TriMet covers the lease expense for three employer- operated vans that provide a “last mile” connection to nearby MAX light rail stations.

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- **Newsletter for Transportation Coordinators:** TriMet provides a newsletter designed for transportation coordinators at employers' worksites. The newsletter includes TDM topics such as transportation program resources and a TMA calendar of events.

### 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). Figure 9 below shows the mode share for employers working with TriMet, based on the DEQ ECO or TriMet ECO survey data.

**Figure 9 2009-2011 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
Comp Work Week	1%	2%	1
Telecommute	0%	2%	2

# Worksites = 728  
# Eco Eligible Employees = 151,963  
VMR (2 years) = 34,385,606-51,578,409

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 buses and WES commuter rail.

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.

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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 Rules. 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

Figure 10 below). Drive alone trips were reduced 3 percentage points due to an increase in transit, compressed work week schedules, and telecommuting. In addition, carpooling decreased by 2 percentage points and biking remained constant.

**Figure 10 2009-2011 Commute Trip Mode Share for Wilsonville Worksites**

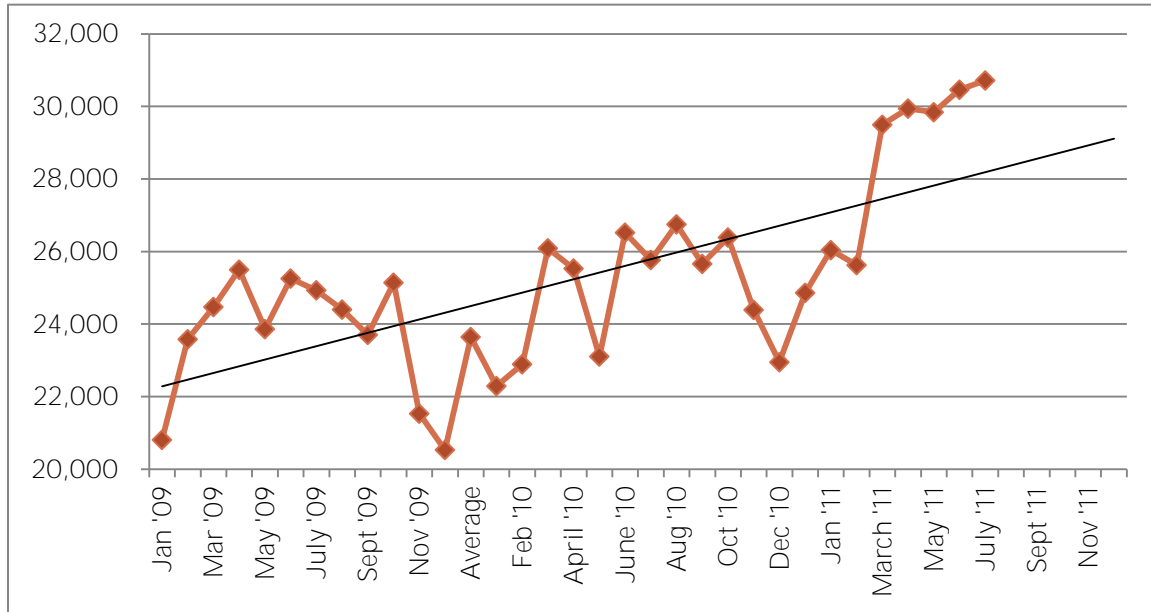
Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	84%	81%	-3
Transit	1%	3%	2
Bike	1%	1%	0
Carpool	12%	10%	-2
Comp Work Week	1%	2%	1
Telecommute	1%	3%	2
# Worksites = 17 # Eco Eligible Employees = 4,493 VMR (2 years) = 863,918 – 1,295,877			

Source: TriMet & ECO Data

#### **SMART Transit**

The success of the SMART Options program was also evaluated based on the change in SMART transit ridership over time. Between January 2009 and July 2011, ridership on SMART transit increased considerably (see Figure 11 below). Monthly average ridership increased from 23,644 riders in 2009 to 24,862 monthly average riders in 2010 to 28,876 monthly average riders 2011 (as of July). This represents a 22% increase in average monthly ridership 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 RTO-related outreach efforts. However, it is supporting data to show that travel behavior in the Wilsonville region is changing to alternative transportation modes.

**Figure 11 SMART Transit Ridership, January 2009 - November 2011**



Source: Wilsonville SMART

**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.

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 2012, counts will be conducted again in the same location to help 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



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224 to decrease the demand on the regional transportation system by facilitating non-SOV transportation options.

#### Program Evaluation

The RTO Subcommittee recommended basic level funding (\$16,391) for the Clackamas TMA, rather than the performance-based funding and booster grant requested. The North Clackamas County Chamber of Commerce 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 expand their geographic boundary a second time.
- 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 Development Association and helps employees travel to work and to other destinations safely and easily using alternative modes of transportation.

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 percentage points higher than the baseline survey (see Figure 12 below). Also of note is the stark increase in carpooling (a 6 percentage point increase between the baseline and current survey).

**Figure 12 2009-2011 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

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Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
Telecommute	0%	1%	1
# Worksites = 7 # Eco Eligible Employees = 1,537 VMR (2 years) = 600,822-901,232			

Source: TriMet & ECO Data

Figure 13 and Figure 14 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 13 Gresham Regional Center TMA Evaluation, 2010**

Contract Goals	Actual Accomplishments
Community outreach: DLSSM, 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 Carefree Commuter Challenge participants, and 1,500 event attendees	Event survey: surveyed 103 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

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**Figure 14 Gresham Regional Center TMA Evaluation, FY2011<sup>7</sup>**

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; commissions from TriMet transit pass sales; 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 provides other resources for biking, walking, and taking transit to work.

<sup>7</sup> The Gresham TMA started working with more work sites in July 2011; this evaluation only goes through June 2011.

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#### 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 15 below).

**Figure 15 2009-2011 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 # Employees = 12,017 VMR (2 years) = 3,075,416 – 4,613,123			

Source: TriMet & ECO Data

Figure 16 and Figure 17 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 16 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 (Source: TMA Annual Report)
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 improvements throughout Lloyd District	Completed
Increase employee and employer awareness of Lloyd District transportation options through staff outreach, communications and events	Completed

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Contract Goals	Actual Accomplishments
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 VMT. 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 17 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 (Source: TMA Annual Report)
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 (note that a few employers the TMA works with are exempt from surveying under the ECO Rules totaling more than 3,000 employees whose commutes are not accounted for in the mode share). The non-SOV mode split for Swan Island employers actually decreased between the baseline and recent surveys by two percentage points. Twenty percent of employees commute to these worksites using non-SOV

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modes, a 2 percentage point decrease since the baseline survey was taken (see Figure 18 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.

Despite a small increase in VMT, Swan Island accomplished notable progress during the evaluation period, including:

- Worked with hundreds of employees through the ongoing individualized marketing effort, “Going to the Island”
- Worked with two major employers to initiate transit pass programs
- Oversaw the completion of the seismic retrofit of the Going Street bridge to include wider bike and pedestrian facilities

**Figure 18 2009-2011 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	12%	8%	-4
Comp Work Week	1%	1%	0
Telecommute	0%	1%	1
# Worksites = 12 # Eco Eligible Employees = 2,334 VMR = VMT Increased 25,631 – 38,447 <sup>8</sup>			

Source: TriMet & ECO Data

Figure 19 and Figure 20 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 VMR reduced could not be calculated with the information provided.

<sup>8</sup> The Swan Island increase in VMT is minimal. It 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 in addition to estimates for the more than 3,000 employees assisted by the TMA but not surveyed.

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**Figure 19 Swan Island TMA Evaluation, 2009-2010**

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 reductions at 9 employment sites that have subsidy programs and conduct surveys. Previous ECO survey results show approximately 665,000 VMR annually	No VMT reduction or ridership information was provided 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 <u>500</u> 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 20 Swan Island TMA Evaluation, 2010-2011**

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	Worked with two major employers to initiate transit pass programs
Increase non-SOV mode split from 20% to 25% among participating employment sites	n/a

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Contract Goals	Actual Accomplishments
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 VMT 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 and develop 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 21 below). Transit increased 3 percentage points, while carpooling decreased 3 percentage points between the baseline and current survey.



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**Figure 21 2009-2011 Commute Trip Mode Share for WTA Worksites**

Mode	Baseline Survey	Recent Survey	% Point Change Over Baseline
SOV	82%	77%	-5
Transit	5%	8%	3
Bike	3%	4%	1
Carpool	9%	6%	-3
Comp Work Week	1%	2%	1
Telecommute	0%	3%	3
# Worksites = 40 # Eco Eligible Employees = 19,573 VMR (2 years) = 4,280,155 – 6,420,232			

Source: TriMet & ECO Data

Figure 21 and Figure 22 below outline the WTA contract goals and compare them to the actual accomplishments during the evaluation period.

**Figure 22 WTA Evaluation, 2009-2010**

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 CarpoolMatchNW database.	Four registrants were recorded in the first three quarters. The WTA also developed a Carpool Board where employees place tags from origination cites 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	There is little interest by employers in offering employee incentives in this difficult economic scenario. In addition,

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Contract Goals	Actual Accomplishments
diary tool to track trips and deliver incentives provided by employers.	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 23 WTA Evaluation, 2010-2011**

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.
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 Bicycle Transportation Alliance (BTA) Bike Commute Challenge is an annual marketing campaign and challenge to increase the number of people biking to work in the region. The

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month-long event makes bike commuting a supported and fun workplace activity each September. 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 24 outlines the goals outlined in the contract, compared to the actual accomplishments of the Bike Commute Challenge.

**Figure 24 Bike Commute Challenge Evaluation, 2009-2011**

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

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**Figure 25 City of Gresham Bike/Ped Wayfinding Evaluation**

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	A total of three media stories ran in the <i>Gresham Outlook</i> and <i>OregonLive.com</i> . Events were also publicized in Gresham's <i>Neighborhood Connections</i> newsletter.
Increase awareness of the "Drive Less. Save More" marketing campaign	DLSM was promoted through the Bicycle Guide, including the DLSM logo and website.
Increase awareness of existing pedestrian, bicycle, and transit facilities	City held "Way to Go Fair," Bike to Work Day, 103 way-finding signs were installed by the end of June 2010, the Gresham Bicycle Guide was designed and delivered to 10,000 people.

### 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 26 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

**Figure 26 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	Unknown.
Get 500 hits on the city webpage version of the bike map	Of the 12,000 maps distributed, 1,242 maps have been requested online and were mailed out.
Distribute 4,000 maps to the city population	12,000 maps were requested by, picked up by, or distributed to people in the community

### Community Cycling Center Understanding Barriers to Bicycling

The Understanding Barriers to Bicycling project was intended to increase the awareness and acceptability of bicycling as a transportation option among minority and low-income participants

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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 27 below outlines the goals outlined in the contract, compared to the actual accomplishments of the COmmunity Cycling Center Barriers to Biking program.

**Figure 27 Community Cycling Center Understanding Barriers to Bicycling Evaluation**

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 barriers	Taught 350 adults bike safety and maintenance skills
Develop relationships with diverse community members	Held 75 meetings with leaders within communities of color

### Gresham 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 28 below outlines the contracted program goals compared to the actual accomplishments.

**Figure 28 Gresham Bicycle Safety Equipment and Bicycle Rack Project**

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.

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#### Program Evaluation

Figure 29 below outlines the goals outlined in the contract, compared to the actual accomplishments of the Lloyd Links program.

**Figure 29 Lloyd Links Program Evaluation**

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 (pages D-30 to D-33)
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 (pages D-30 to D-33)
Maintain existing level of employee use of car/vanpooling as a commute option (10% commute mode split).	See Lloyd TMA evaluation above (pages D-30 to D-33)
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 (pages D-30 to D-33)
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 DLSSM	Completed

#### PSU Long-Term Bike Parking

Portland State University (PSU) faculty, students, and staff indentified 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 30 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

**Figure 30 PSU Long-Term Bike Parking Evaluation**

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)

### City of Portland 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 and climate change.**

#### Program Evaluation

Figure 31 and Figure 32 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

**Figure 31 Sunday Parkways Evaluation, 2009-2010**

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 32 Sunday Parkways Evaluation, 2010-2011**

Contract Outcomes	Actual Outcomes
Reach all area residents within two blocks of a designated route at least seven times with Sunday Parkways messages.	Completed.
Hold 5 Sunday Parkways events	Held 5 events: Northeast Portland, North Portland, East Portland, Southeast Portland and Northwest 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 33 below outlines the program accomplishments compared to the goals as outlined in the Metro RTO contract.

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**Figure 33 Swan Island TMA Trip Not Taken Evaluation**

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 of Portland Affoot analyzed 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
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 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



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

**Figure 34 WTA Bike Rack Program Evaluation**

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 DLSSM online trip diary. WTA staff analyzed the data at the close of the Challenge.

#### **Program Evaluation**

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

**Figure 35 WTA Carefree Commuter Challenge Evaluation**

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 originally targeted close to 3,000 households near the new Gresham Civic Drive MAX station but the City of Gresham added resources to expand to 8,100 households. 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 36 below outlines the program accomplishments of the Gresham Civic Drive program compared to goals as outlined in the Metro RTO contract.

**Figure 36 City of Gresham Civic Drive**

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 12% of target population in one program or project	27% 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 SmartTrips Green Line

The Portland SmartTrips Green Line 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 37 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

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**Figure 37 City of Portland Green Line SmartTrips Evaluation**

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 39 million VMT (Source: City of Portland Green Line report)
Increase 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 CarpoolMatchNW.org
Increase awareness of “Drive Less. Save More.” marketing campaign	Not included in annual report

### **City of Portland SmartTrips North-Northwest**

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

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**Figure 38 City of Portland SmartTrips N/NW Evaluation**

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 16 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) (Source: City of Portland report)
Increase 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 CarpoolMatchNW.org
Increase awareness of “Drive Less. Save More.” marketing campaign	Not included in annual report

### **City of Portland SmartTrips N/NE**

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

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**Figure 39 City of Portland SmartTrips N/NE Evaluation**

Contract Goals	Actual Accomplishments
Decrease drive alone trips by 8%	This project is not yet complete; report will be done late 2011.
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 40 below outlines the program accomplishments compared to the program goals as outlined in the Metro RTO contract.

**Figure 40 Discover Wilsonville Evaluation**

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

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Contract Outcomes	Actual Outcomes
	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.

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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.), but they do pool the ECO data that is used in the biennial evaluation. For the level of investment, the expectation could be greater to keep track of the ECO data progress on a yearly basis. Conversely, the City of Gresham was required to conduct a before and after survey to 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 2009-2011 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.

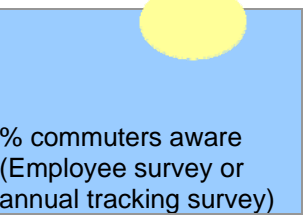
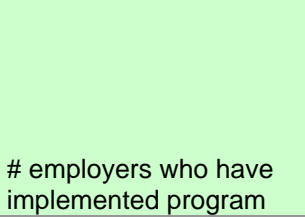
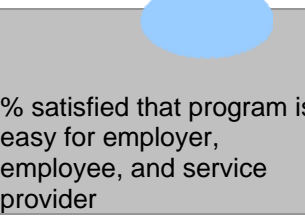

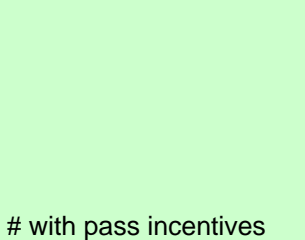
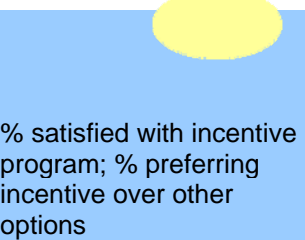
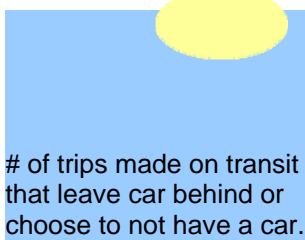
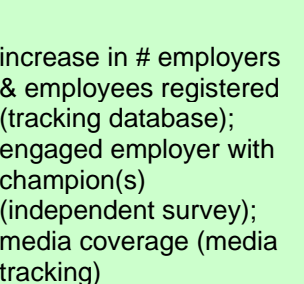
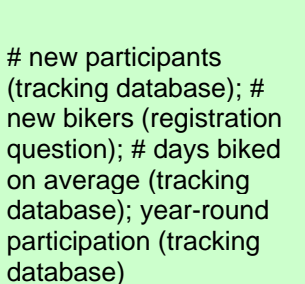
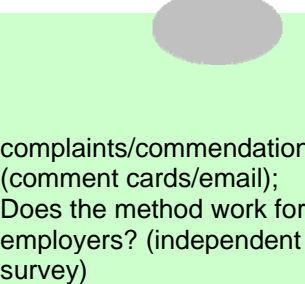
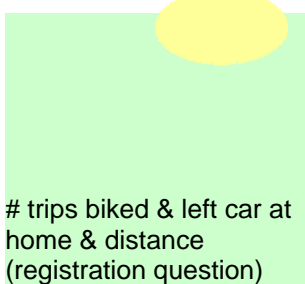
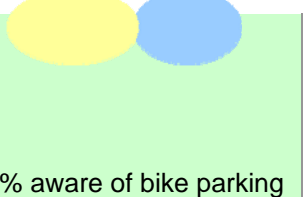
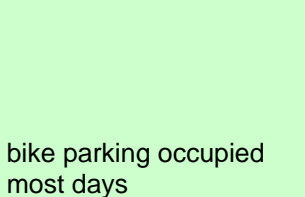
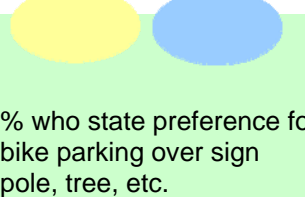

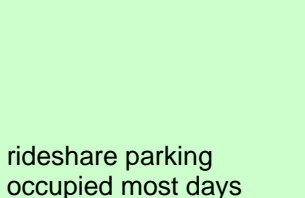
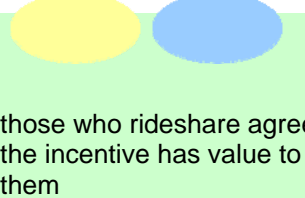
# APPENDIX E MATRIX OF PRECURSOR METRICS

Colors represent which tools could be used for data collection:	Funding recipient tracking	Region-wide survey	Employee survey	Online	Other survey/independent analysis
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General RTO program areas	Examples	Services / activity provided	Awareness	Participation	Satisfaction	Action: Utilization of alternative modes/ Behavior change
Rideshare program	Online rideshare matching tool	live website; attended phone line and email (quarterly report)	%commuters aware (annual tracking survey)	Increased # of registrants (online database) and % matched (online survey)	rating (online survey)	# leaving car at home (online survey)
Rideshare program	Vanpool subsidy program	program for arranging vanpools, incentive program	%commuters aware (annual tracking survey)	vans & riders increase (vanpool logs)	study of satisfaction of/with driver, van, vanpoolers, origin, destination, traffic (mail-in or online survey)	# leaving car at home (registration and rider survey)
Employer outreach	Technical assistance to ECO affected employers	Marketing to, and contact with employers; Partners (TMAs, SMART, etc) coordinating work with employers (quarterly report)	% employers aware of help (employer outreach question during first contact); # of contacts (quarterly report); # of materials distributed (inventory)	# employers/employees helped (tracking programs and incentives offered by employers); # employers complying with ECO (Employee survey)	% employers satisfied that technical assistance has been provided.	NA
Employer outreach	Transportation coordinator training	Training offered	% employers aware of training offering	# attendees	Satisfaction score from training feedback form	NA
Employer outreach	Transportation fairs	outreach person at booth	% contacts of total attendees; % of employees aware	# contacts	Satisfaction that questions were answered (feedback form)	NA



Metro Regional Travel Options 2012-2017 Strategic Plan  
Metro RTO

General RTO program areas	Examples	Services / activity provided	Awareness	Participation	Satisfaction	Action: Utilization of alternative modes/ Behavior change
Incentive program, long-term	Emergency/guaranteed ride home	vouchers distributed	 % commuters aware (Employee survey or annual tracking survey)	 # employers who have implemented program	 % satisfied that program is easy for employer, employee, and service provider	NA
Incentive program, long-term	Transit pass incentive/subsidy program	annual pass incentive is available	 % aware of incentive	 # with pass incentives	 % satisfied with incentive program; % preferring incentive over other options	 # of trips made on transit that leave car behind or choose to not have a car.
Incentive program, short-term	Month-long commuter challenge	A structure is in place that includes sending out emails, hosting a website, partnering (e.g., DLSP) and identifying champions (quarterly report)	 increase in # employers & employees registered (tracking database); engaged employer with champion(s) (independent survey); media coverage (media tracking)	 # new participants (tracking database); # new bikers (registration question); # days biked on average (tracking database); year-round participation (tracking database)	 complaints/commendations (comment cards/email); Does the method work for employers? (independent survey)	 # trips biked & left car at home & distance (registration question)
End-of-trip facilities	Bike parking	# bike parking stalls	 % aware of bike parking	 bike parking occupied most days	 % who state preference for bike parking over sign pole, tree, etc.	NA
End-of-trip facilities	Reserved carpool parking spaces	# parking spaces for rideshare vehicles	 % aware of rideshare spaces	 rideshare parking occupied most days	 those who rideshare agree the incentive has value to them	NA

Metro Regional Travel Options 2012-2017 Strategic Plan  
Metro RTO

General RTO program areas	Examples	Services / activity provided	Awareness	Participation	Satisfaction	Action: Utilization of alternative modes/ Behavior change
Location efficient living	Promote housing to nearby workers (Employer Assisted Housing)	Market concept to employer area; connect concept to new housing; (quarterly report)	% employers aware of concept (employer outreach question during first contact)	Employers offer incentive (partnership tracking)	increased satisfaction with commute, increased quality of life & saved money	Reduce VMT with all trips per household, especially when located in good land use areas such as centers.
Location efficient living	Promote work opportunities to nearby residents	local job fair or announcements	% residents aware of nearby industries	% local applications increase	% satisfied that local industries have made efforts for local outreach	NA (follow-up with household can show reduced VMT).
Marketing, community-based	Neighborhood outreach	speakers bureau; booth at event (event tracking database)	% aware (oversample in community during regional awareness survey; community-based survey)	# events; # materials distributed; size of event; contacts; signed commitment cards; coupons used; # people at event; returned forms (event tracking database and coupon collection)	feedback (feedback evaluation form); % aware (regional awareness survey; community based survey)	NA - can't isolate but indicated by overall mode splits
Marketing, individualized	Neighborhood outreach	1-on-1 contact; mailing/emailings	pre&post survey	# households; # participants; participation rate; # materials distributed	in-depth interview; customer comments	survey showing behavior change
Marketing, mass	Ad campaign	TV ad; radio; billboards; bus sides; channel cards; earned media; newspaper; print	pre&post awareness survey; message awareness	reach & frequency; commitment cards signed; website traffic	satisfaction that valuable/actionable information was provided by campaign elements	can't isolate; post survey could estimate based on awareness and stated actions after seeing/hearing ads and other campaign elements; comparisons could be made between pre & post mode splits; regional VMT reduced might relate to some campaign elements
Traveler information tool	Printed bike map	# maps printed	feedback/comments (negative/positive); regional awareness survey	# distributed; who buys them; # people who buy them (retail sales)	feedback from customers (positive/negative); repeat buyers (retention)	NA

Metro Regional Travel Options 2012-2017 Strategic Plan  
Metro RTO

General RTO program areas	Examples	Services / activity provided	Awareness	Participation	Satisfaction	Action: Utilization of alternative modes/ Behavior change
Traveler information tool	Online tool: trip planner; transit tracker	available on web	attitudes, awareness survey; web survey	# bookmarked; # visits; # completed trip plans	attitudes, awareness survey; web survey	NA
Traveler information tool	Walking guide: "How to Ride"; transit schedules	# printed	awareness survey	# distributed	if aware, ask satisfaction on region-wide survey; feedback from customers (positive/negative)	NA
Walk program	Leading walks	# events; event marketing; walks; coupon books	regional awareness survey; community-based survey	# participants; miles walked; list of names	participant surveys	participant survey; exercise vs. recreation
Bike program	Helmet fitting and giveaway	# helmets distributed	how did participants find out about event using event-participant survey; regional or community survey	# of people at events; # fittings; pledge cards signed	event-participant survey	NA - indirect
Carshare program	Flexcar introduced to a regional center	Car available to be borrowed at least some hours most days.	% of local population aware of car	# of members within X miles; # who have used Flexcar at least once	member satisfaction	# uses by those owning one less car
Parking management	Parking regulation introduced to a regional center	Signage and enforcement	% of population aware of regulation.	% cars obeying regulation	satisfaction with signage, lower-hassle parking	Reducing congestion by reducing car mileage driven to hunt spaces for areas where parking is filled to 100% capacity to 85% (thought to be optimal capacity).

Source: Portland State University

Materials following this page were distributed at the meeting.



## Washington County Citizen Action Network

*Washington County Citizen Action Network (WC CAN) is a coalition of grassroots advocates (groups and individuals) dedicated to improving quality of life in Washington County by promoting healthy and sustainable communities, social and economic justice, and open and responsive government.*

May 24, 2012

To: Metro Council President Hughes  
Metro Councilors

Re: Ordinance No. 12-1275

I am testifying today as the Chair of Washington County Citizen Action Network, joining 1000 Friends of Oregon, Coalition for a Livable Future and others in support of this ordinance. As advocates for citizen empowerment and open, responsive government, we'd also emphasize these points::

1) Documenting the results of citizen involvement efforts involves more than the numbers of people contacted, testifying, or responding to surveys. *Some assessment is needed of the impact citizen input has on planning and policy decisions.* WC CAN hereby offers resources - members with years of experience as citizen activists *and* professional expertise in program evaluation -- to work with Metro and public involvement professionals toward practical sound indicators and methods of assessing impacts of citizen involvement on policy and operations.

2) Citizen involvement "best practices" ultimately rest on mutual respect between public officials and those citizens who *do* volunteer time and skills to engage or advise. Electeds who think they know all the right answers before they hear from us do not inspire confidence or motivate us to donate time and skills, except out of fear, anger or outrage. That sort of "participation" is the opposite of what we all seek.

When elected officials and staff *do* systematically seek stakeholder input early in planning, when they know how to *use* input from diverse or conflicting sources to design better programs or products, *then* the stage is set for success. We look forward to a new flowering of such successes at Metro, and we are ready to help.

Sincerely,

A handwritten signature in cursive script that reads "Linda Peters".

Linda Peters

Chair, Washington County Citizen Action Network

Letter of Support for Public Involvement Program and Ordinance 12-1275

Dear Council President Hughes, Members of the Metro Council,

We are writing generally in support of the new Public Engagement Review program and Ordinance 12-1275, as it is a more pragmatic and effective approach to public involvement that addresses many of the problems with the previous public engagement program. We also appreciate the focus on measurement and evaluation, as it will provide helpful information to continue to refine the program.

At the same time, we have some recommendations on ways to ensure that this rethinking of Metro's public engagement will meet goals it has set out to achieve, and helps meet Metro's regional goal of equitably sharing benefits and burdens of growth and change.

**1. Be clear in your goals and strategies for improving and diversifying public engagement.**

As you know, Metro's audit in September 2010 showed that informing the public had been prioritized over engaging the public, and that additional steps and funding prioritization would be needed to remedy that. The 2010 audit also showed that most people who participated in Metro's public engagement were white, owned property, and were of middle to upper incomes.

This process provides an opportunity to address this problem and reach under-represented communities. Measurement and evaluation of Public Engagement Review should also specifically include who was *not* reached through Metro's public engagement efforts and recommend strategies to remedy this in the future.

**2. Advisory groups should include diverse and meaningful representation of residents from across the region.**

In order to highlight and facilitate diverse and meaningful representation in advisory groups, we recommend that the criteria for the selection of community member and community organization representatives to the Public Engagement Review Committee be made more specific regarding diversity of participants, to include a focus on people of color and other under-represented communities.

We also encourage Metro to develop relationships to adequately engage those who are currently disenfranchised but ultimately impacted by regional planning decisions. This capacity needs to be elevated as a public involvement priority with assurance of adequate funding.

In addition, we see both the Public Engagement Peer Group and the Public Engagement Review Committee as opportunities for a variety of viewpoints and perspectives to come together to share information. These groups should be a legitimate voice in evaluation and should be engaged in the earliest stages of planning when issues are initially being framed.

**3. Use the Public Engagement Review process and Stakeholder Summit as an opportunity to show how input is used in decision-making.**

The Stakeholder Summit provides an important and necessary opportunity for residents to evaluate and discuss public engagement practices and strategies. To gain meaningful participation, residents must get the assurance that public input actually affects Councilors' policy decisions.

The Stakeholder Summit could also provide an opportunity for the public to gain a better understanding and receive a progress report on how the regional planning goals and objectives are and are not being met – similar to the regional roundtable for local and regional policy makers.

In order to facilitate this goal, we recommend releasing the public engagement report prior to the Stakeholder Summit, so the Summit could be used to educate stakeholders about public involvement activities and help Metro prioritize for the following year. While the Stakeholder Summit would no longer inform the public engagement report directly, it would serve the more important purpose of educating the public and informing the engagement activities for the following year. It would also provide key information on how to address deficiencies highlighted in the report, informing the following year's report.

We thank Metro staff for the hard work involved in developing what we hope will be an effective process for achieving a more robust and diverse public involvement process. Thank you for the opportunity to comment on this proposal.

Sincerely,

Tara Sulzen, Outreach Coordinator  
**1000 Friends of Oregon**

Steph Routh, Executive Director  
**Willamette Pedestrian Coalition**

Felisa Hagins, Political Director  
**SEIU-49**

Mara Gross, Policy Director  
**Coalition for a Livable Future**

Linda Peters, Chair  
**Washington County Citizen Activist Network**

Martha McLennan, Exec. Director  
**NW Housing Alternatives**

Nick Sauvie, Executive Director  
**Rose CDC**

Heidi Guenin, Transportation Policy  
Coordinator  
**Upstream Public Health**

Darlene Carlson  
CLF Board Member

Sue Marshall, Principal  
**Trillium Consulting**

Kathie Minden, Chair/Director  
**People for Parks**



# Regional Travel Options: Creating healthy, vibrant neighborhoods



LLOYD CENTER

825

SMOKE-FREE PROPERTY

lloyd tma  
your go-to place for get there options  
Win rewards for car-free commuting  
Walk  
Bike  
Transit  
www.lloyd

Metro  
Drive less. Save more.  
www.DriveLessSave.com

CARAVAN



# 5 Fun Facts about RTO



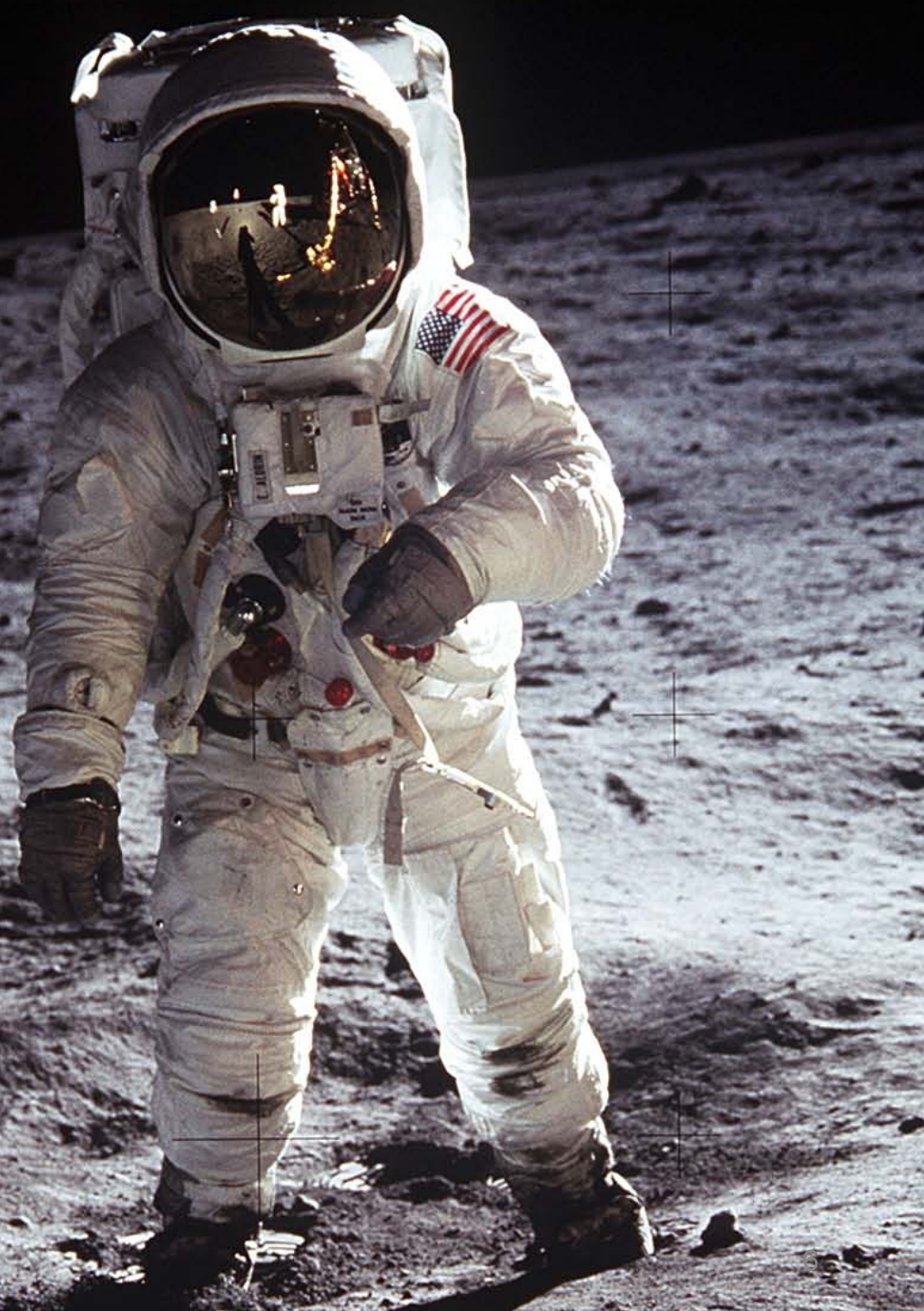
**1. Saved 3  
Olympic pools  
of gasoline,  
equal to \$7  
million.**



**2. Connected with more than 3,300 people through bilingual outreach.**



**3. Reduced 84 million vehicle miles, equal to 174 round trips to the moon.**





**4. Launched Drive Less Connect, providing an option to over 3,000 residents and employees.**

**5. Removed 32,000 metric tons of pollutants from our air, which is like planting 23,000 acres of Douglas Firs...  
or 5 Forest Parks.**





**Authorization to Represent MERC/METRO  
on Trade-Promotion Mission; Fact-Finding Mission;  
Economic Development Activity; or Negotiation  
(Food Travel, Lodging Expenses Approved in Advance- exception (H))**

In accordance with ORS 244.020(5)(b)(H), the following public officials: **all current MERC Commissioners and current Metro Councilors** are hereby authorized to represent Metro/MERC in an official capacity; and

The MERC Commission and Metro Council hereby approves in advance, the receipt of reasonable expenses for food, travel, and lodging for the above-named public officials and his/her accompanying relative, household member, or staff member, for attendance at (check one):

- trade-promotion mission;**
- fact-finding mission;**
- economic development activity; OR**
- negotiation;**

as follows (*describe date and type of event*):

A Portland familiarization tour ("fam tour") and activities related to the Travel Portland Customer Advisory Board where meals will be paid for by Travel Portland, to familiarize potential meeting planners and association executives with Portland and with the Oregon Convention Center, and to facilitate Oregon and Portland tourism and economic development, which activities will take place in Portland on **June 7, 8 & 9, 2012 and July 25, 26 & 27, 2012.**

Being approved by the MERC Commission, at its regular meeting on May 2, 2012, the above activity is hereby officially sanctioned by MERC.

\_\_\_\_\_  
MERC Commission Chair

Being approved by the Metro Council, at its regular meeting on \_\_\_\_\_, the above activity is hereby officially sanctioned by Metro.

\_\_\_\_\_  
Metro Council President

TRAVEL  
PORTLAND

1000 S.W. BROADWAY, STE. 2300 | PORTLAND, OR 97205 | 503.275.9750 TEL | TRAVELPORTLAND.COM

April 27, 2012

Dear Travel Portland Board of Directors, City of Portland Commissioners, Multnomah County Commissioners, Metro Councilors, MERC Commissioners and Multicultural Advisory Council:

Travel Portland will be hosting a convention "Familiarization Trip" to Portland over the dates of June 7-10, 2012.

Approximately 24 national association executives and decision-makers, representing 17 associations, will be here to review Portland as a possible future convention site. These clients range from Oregon Convention Center users to multiple and single-hotel users.

Familiarization trips have been very successful in the past. Historically, fifty percent of customers attending previous trips have eventually chosen Portland as a meeting site, resulting in millions of dollars of business for the community. We feel this remarkable response can largely be attributed to the support, friendliness and sincerity of the Oregonians our visitors meet during their stay.

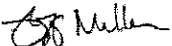
It is important that we show these valued clients that we appreciate the economic importance of their meetings. The presence of community leaders can make a huge impact, and we sincerely hope your schedule will allow you to attend your choice of the following events as our guests.

THURSDAY June 7, 2012	FRIDAY June 8, 2012		SATURDAY June 9, 2012	
6-8:30 p.m. Dinner  Meriwether's Restaurant  2601 N.W. Vaughn St.  Dress: Business	8-9 a.m. Breakfast  Hilton Portland & Executive Tower  921 S.W. Sixth Ave.  Dress: Business	1-2 p.m. Lunch  Doubletree Hotel Portland  1000 N.E. Multnomah St.  Dress: Business	8:15-10 a.m. Breakfast  Oregon Zoo  4001 S.W. Canyon Road  Dress: Casual	5:15-9 p.m. Reception/ Dinner  Elements Glass  1979 N.W. Vaughn St.  Dress: Business Casual

These functions offer the best opportunities and the most convenient times for you to meet our guests. I hope we will have the pleasure of your company. Please mark your calendars now and RSVP by Friday, June 1, 2012, to Jackie Harper, CMP (503.275.9290 or jackie@travelportland.com), if you are able to join us.

Again, your continued support of our industry is highly valued.

Sincerely,



Jeff Miller  
President & CEO

# The Portland - Milwaukie Light Rail Song

*Lyrics by Carol LaTourette*

In honor of the signing of the FFGA for the Portland – Milwaukie Light Rail Transit Project  
Tuesday May 22, 2012

Performed By: The McTugs (*Milwaukie Center Thursday Ukulele Group*)  
Sung to the tune of "McTavish"

**SING ALONG!**

**Rhythm:** 1, 2, 3 – 1, 2, 3 – 1, 2, 3 (Trip-uh-let, trip-uh-let, trip-uh-let)

Oh, we've gathered together to give to give a big cheer  
To the people that put this together all here  
It's been long on the board but we heartily say  
We'll break ground on the project and have a great day!

Oh, the Portland - Milwaukie Light Rail we do boast  
It will get us to places more eas'ly than most  
So we're happy to be here to help celebrate  
The Portland - Milwaukie Light Rail on this date!

Oh, the Portland – Milwaukie Light Rail is the run  
When you want to go someplace to have some great fun  
And for everyday travel from home and to work  
It's the way of the future; the travel net-work!