

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE) RESOLUTION NO. 04- 3400
REGIONAL TRAVEL OPTIONS PROGRAM 5-)
YEAR STRATEGIC PLAN) Introduced by Councilor Park

WHEREAS, Metro adopted the 2000 Regional Transportation Plan on August 10, 2000; and

WHEREAS, Policy 19.0. Regional Transportation Demand Management (TDM) calls for enhances mobility and supports the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling and walking options; and

WHEREAS, the TDM Subcommittee of the Transportation Policy Alternatives Committee (TPAC) that provides oversight for the development and evaluation of TDM strategies has gone through a strategic planning process and has developed a Regional Travel Options (RTO) 5-year Strategic Plan; and,

WHEREAS, the TDM Subcommittee has developed funding scenarios for the Regional Travel Options program through FY 2007/08; and

WHEREAS, Funding Scenario A describes a financially constrained budget for the RTO program, that has been given preliminary approval by the TDM Subcommittee; and

WHEREAS, The Regional Travel Options Senior Management Team has endorsed an agreement developed by Metro and TriMet staff that \$100,000 in Metropolitan Transportation Improvement Program (MTIP) reserve funds will go to the RTO Program and \$400,000 in MTIP reserve funds will go to the TriMet Frequent Bus Program; and

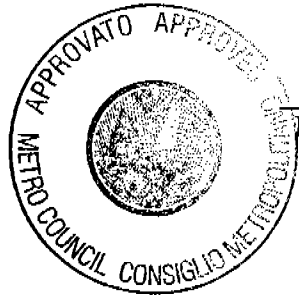
WHEREAS, Scenario C describes a preferred program budget for the RTO program and is the basis for seeking future additional funds for the RTO program, including the MTIP, a portion of the Oregon Department of Transportation (ODOT) \$1.5 million TDM funding and other funding sources: now therefore

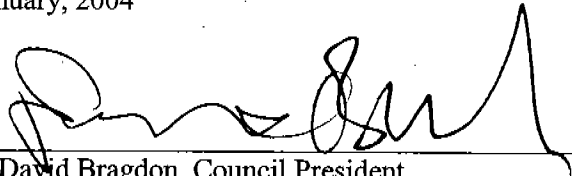
BE IT RESOLVED by the Metro Council

1. Approve the mission, goals, strategies and actions in the Regional Travel Options Program 5-Year Strategic Plan.
2. Approve the Scenario A Financially Constrained Program described in Appendix A of the RTO Program 5-Year Strategic Plan.
3. Seek additional funds in the future to implement Scenario C, the Preferred Collaborative RTO Program described in Appendix A of the RTO Program 5-Year Strategic Plan.

4. Direct Regional Travel Options Staff to work with ODOT in developing performance measures and distribution plan for a regional percentage of the ODOT \$1.5 million TDM budget approved by the Oregon Legislature.
5. Rename the Transportation Demand Management Subcommittee of TPAC to the Regional Travel Options Subcommittee of TPAC to reflect the updated mission of the program.
6. Retroactive to June 30, 2003, unspent RTO funds in any RTO program category at the end of a fiscal year may be carried over to the next fiscal year or reallocated to other RTO program categories in the RTO Strategic Plan, as determined by the RTO Subcommittee of TPAC and subject to the resolution process through TPAC, JPACT and Metro Council.
7. Approve *Exhibit A: Metro / TriMet Agreement on MTIP Reserve Funds*, in regard to recommending that \$100,000 in MTIP reserve funds set aside in Resolution No. 03 – 3335 will go to the RTO Program and \$400,000 will go to the TriMet Frequent Bus Program.

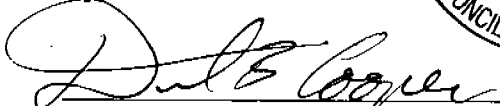
ADOPTED by the Metro Council this 15th day of January, 2004





David Bragdon, Council President

Approved as to Form:



Daniel B. Cooper, Metro Attorney

**Metro / TriMet Agreement on MTIP Reserve Funds
December 9, 2003**

Metro and TriMet agree that \$100,000 of the \$500,000 MTIP reserve would go to the Regional Travel Options (RTO) Program and \$400,000 would go to the TriMet Frequent Bus Program. The staff report and resolution that adopts the RTO 5-Year Strategic Plan will be revised to reflect the program funding adjustment described below.

Regional Travel Options program funding would be adjusted as follows:

- \$103,888 in unspent funds from Regional Vanpool Program would be used to cover RTO program expenditures for the Region 2040, Transportation Management Association (TMA) and Rideshare Programs through June 2006 as per Scenario A using unspent vanpool funding from FY 2002 and 2003.
- \$206,756 unspent funds in TriMet Employer Outreach is returned to the RTO program and reallocated to the Collaborative Marketing Program, with Business Energy Tax Credit (BETC) used as the local match. The attached tables on page 3 (*TriMet – CMAQ Surplus Calculations for Core Program: November 21, 2003*) provide a more detailed calculation. As a result of the funding returned to the RTO Program, Metro will hire a Marketing Program Manager as soon as possible. Metro and Oregon Department of Energy staff are exploring the feasibility of using the BETC Program as a mechanism for providing local match of \$23,600, with a decision expected in mid-December 2003.
- TriMet would no longer be responsible for the match for Regional TMA, Region 2040 Initiatives and Rideshare Programs, freeing up \$109,642 per year beginning in July 2006 or when the programs are transferred. A more detailed calculation (*TriMet Match – Backfill Proposal Calculation: November 21, 2003*) is attached.
- **Total recovered for RTO Program: \$520,286**

Local Match Issues

- TriMet would continue to provide local matching funds for the Regional TMA Program, the Region 2040 Initiatives Program, and the Regional Rideshare Program in FY2004/05 and FY2005/06. Local matching for new TMA start-ups is provided in part by non-TriMet sources, as identified in adopted Regional TMA policy (Metro Res. No.02-3183, revising TMA policy to provide additional funding options for TMAs).
- Starting on July 1, 2006 local matching funds for the Regional TMA Program, the Region 2040 Initiatives Program and the Regional Rideshare Program would be provided by those jurisdictions, agencies and TMAs that receive federal funds through the MTIP.

Program Administration Transition Issues

- TriMet and Metro staff will explore the feasibility of an institutional program administration transfer from TriMet to Metro to be completed no later than July 1, 2006 and no earlier than July 1, 2005 for the Regional TMA, Region 2040 Initiative and Regional Rideshare Programs.

- Beginning as early as FY05/06 and no later than FY06-07, Metro will be the grant applicant to Federal Transit Administration (FTA) for all RTO funds. The funds will be allocated to RTO programs using the five-year strategic plan (to be articulated in a future Metro resolution and staff report). RTO funds will be obligated (i.e. federal grant money received through the MTIP) to Metro.
- Metro and TriMet staff will review Regional TMA, Region 2040 Initiatives and Regional Rideshare funds administration on a quarterly basis until program administration is transferred to Metro. All other RTO programs will provide quarterly and annual financial reports.
- The resolution and staff report going to the Transportation Policy Alternatives Committee (TPAC) on December 5th will also reflect the following. Effective retroactively to June 30, 2003, if there are unspent RTO funds in any RTO program category at the end of a fiscal year, the funds may be either carried forward to the next fiscal year or reallocated to other RTO program categories in the RTO Strategic Plan, as determined by the RTO Subcommittee and subject to the resolution process through TPAC, JPACT and Metro Council.

**TriMet Match – Backfill Proposal Calculation
November 21, 2003**

Premise: TriMet devotes funds that would otherwise match the TMA program, the Vanpool program, and the 2040 Initiative program to underwrite the Core Program, thereby reducing the total Congestion Mitigation Air Quality (CMAQ) allocation to the Core Program. These programs would now require matches from the grantees.

(These are actual figures from FY '02 Grant Year – FY '03 TM Fiscal Year)

	TM Match '02	TM Retain '04/Apply to Core Program
TM Outreach Staff	\$31,352	\$0 – (No change in TM Match)
TM Evaluation Staff	\$14,011	\$0 – (No change in TM Match)
TM Carpool Staff	\$1,152	\$0 – (No change in TM Match)
TM Outreach M/S	\$1,086	\$0 – (No change in TM Match)
TM Evaluation M/S	\$1,808	\$0 – (No change in TM Match)
TMA Grant	\$31,560	\$31,560 – (Reduced from TM Core Request)
2040 Initiatives	\$15,358	\$15,358 – (Reduced from TM Core Request)
Van Pools	\$62,724	\$62,724 – (Reduced from TM Core Request)
		\$109,642 –(Reduced from TM Core Request)

**TriMet - CMAQ Surplus Calculation for Core Program
November 21, 2003**

Item	CMAQ '03 Total	TM '04 CMAQ Budget	TM '04 Match	Total TM (C+D)	Surplus (B-C)
RTO Outreach Staff	\$468,340	\$312,390	\$35,599	\$347,989	\$155,950
Evaluation Staff	\$151,418	\$107,746	\$12,279	\$120,025	\$43,072
Carpool Staff	\$14,035	\$53,508	\$6098	\$59,606	-\$39,473
Outreach M/S	\$47,067	\$16,697	\$1,903	\$18,600	\$30,370
Evaluation M/S	\$39,483	\$23,246	\$2,649	\$25,895	\$16,237
TOTAL	\$720,343	\$513,587	\$58,528	\$572,115	\$206,756

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 04 - 3400, FOR THE PURPOSE OF ADOPTING THE REGIONAL TRAVEL OPTIONS PROGRAM 5-YEAR STRATEGIC PLAN

Date: December 4, 2003

Prepared by: Bill Barber

Staff recommends adoption of the mission, goals, strategies and actions in the Regional Travel Options (RTO) Program 5-Year Strategic Plan. The recommendation includes a financially constrained funding scenario that retains \$100,000 in Metropolitan Transportation Improvement Program (MTIP) reserve funds as described in Appendix A of the Plan. In addition, the preferred funding scenario described in Appendix A is the basis for seeking future additional funds for the RTO Program, including the MTIP, a portion of the ODOT \$1.5 million TDM funding recently approved by the Oregon legislature, and other funding sources.

The Strategic Plan is the result of a six-month process by the TDM Subcommittee at large, and a number of working groups, including transportation management associations (TMAs), marketing, performance measures and rideshare groups. The working groups completed the detailed program work plans in Appendix B of the plan. In addition, a Senior Management group with representatives from Metro, ODOT, Portland and TriMet participated in the process in an advisory capacity.

What has emerged from the strategic planning process is a bold new vision and proposed direction for the Regional Travel Options program. The new vision emphasizes working more collaboratively to implement a highly integrated program that has measurable results and tangible impacts on the environment, the economy and the quality of life of all people in the region. The strategic plan represents an exciting move toward greater regional cooperation when it comes to delivering a wide range of travel options to residents of the region. The program is becoming increasingly connected with related regional planning efforts such as 2040 Centers, transit-oriented development, corridor planning and community health.

The mission of the RTO program is: "The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region." Because of this change of focus staff recommends changing the name of the Transportation Demand Management (TDM) Subcommittee of TPAC to the Regional Travel Options (RTO) Subcommittee of TPAC.

The Plan is attached to this staff report and includes the following:

- Regional Travel Options Program 5-Year Strategic Plan (Draft November 5, 2003)
- Appendix A: Budget/Funding Scenarios
- Appendix B: Detailed Program Work Plans
- Appendix C: Past Program Expenditures

One key component of the strategic plan are the alternative budget/funding scenarios described in Appendix A, including two financially constrained funding scenarios and a preferred funding scenario for the Regional Transportation Options (RTO) program. The three funding scenarios are summarized as follows:

Scenario A. This is a financially constrained scenario based on funding allocated through three MTIP cycles. It assumes that \$100,000 in RTO funding that is currently in an MTIP reserve fund pending completion of the strategic plan would be retained, and \$400,000 would go to TriMet's Frequent Bus Program. RTO funding would be further adjusted in order to implement Scenario A.

- \$103,888 in unspent funds from Regional Vanpool Program would be used to cover RTO program expenditures for the Region 2040, TMA and Rideshare Programs through June 2006 as per Scenario A using unspent vanpool funding from FY 2002 and 2003.
- \$206,756 unspent funds in TriMet Employer Outreach is returned to the RTO program and reallocated to the Collaborative Marketing Program, with BETC used as the local match. Metro and Oregon Department of Energy staff are exploring the feasibility of using the Business Energy Tax Credit (BETC) Program as a mechanism for providing local match of \$23,600, with a decision expected in mid-December 2003.
- TriMet would no longer be responsible for the match for Regional TMA, Region 2040 Initiatives and Rideshare Programs, freeing up \$109,642 per year beginning in July 2006 or when the programs are transferred.

Marketing funds are divided between the TriMet employer program to support employee outreach and transit pass marketing, and a proposed collaborative marketing program that integrates marketing efforts of all regional partners. A regional rideshare program that combines regional vanpool, CarpoolMatchNW and an integrated marketing program is proposed. Scenario A is recommended as the financially constrained budget, based on current levels of funding allocated through the Metropolitan Transportation Improvement Program (MTIP) through FY 2007/08.

Scenario B. This scenario assumes that \$500,000 in RTO funding (federal CMAQ funds, not including local match) would be transferred to TriMet's frequent bus program in 2006 and 2007. Funding is cut from the TriMet employer program and the collaborative marketing program. The rest of the RTO Program remains the same as Scenario A.

Scenario B is not recommended due to adverse impacts to the current TriMet employer program and the proposed collaborative marketing program. Cutting other RTO core programs would have adverse effects as well. Also, the Regional TMA and Region 2040 Initiatives Components of what was then called the Regional TDM Program were cut by about \$500,000 during the 2002 MTIP process, and that funding was not replaced during the 2004 MTIP process.

Scenario B was developed to describe the impact of cutting \$500,000 in federal funds from the program. A more agreeable solution (as described above in Scenario A) was reached through Metro and TriMet staff discussion and endorsed by the RTO Senior Management Team.

Scenario C: Preferred RTO Collaborative Program. This scenario shows what a fully funded transportation options program would look like for the region. Additional funds outside of MTIP programming would need to be secured. Scenario C assumes growth in the TriMet Employer Program and Collaborative Marketing Program. The preferred program also assumes new and expanded RTO program elements, including targeted travel training and a targeted pedestrian safety campaign. In order to implement Scenario C, staff recommends pursuing funding beyond MTIP.

BACKGROUND

The purpose of the Regional Travel Options Program includes guiding implementation of regional transportation demand management (TDM) policies in the Regional Transportation Plan (RTP). These policies, in turn, are the RTP strategy for leveraging the development of compact centers with transportation investments. The program provides for analysis and recommendation of TDM techniques and strategies within the Portland region. Metro chairs the TDM Subcommittee of TPAC and works with TriMet, ODOT, DEQ and other state agencies; local jurisdictions and private employers to plan fund and implement TDM strategies. Target groups served or affected include local cities and counties, state and regional agencies and the public at-large. The program relates to Metro's mission and value statement by ensuring that people have the ability to get around the region using a variety of transportation options.

During the past 10 years the regional TDM program has advanced from a policy and planning program towards a regionally coordinated implementation program. In 1992, the TPAC Transportation Demand Management (TDM) Subcommittee was established by Metro Resolution to develop project selection criteria and oversee program implementation activities for the first two rounds of Congestion Mitigation and Air Quality (CMAQ) projects in the region. The mission of the TDM Subcommittee is to reduce the need to drive by advocating for TDM in the region, developing funding and policy recommendations to TPAC and coordinating regional TDM programs. In order to achieve this mission, the TDM program at TriMet was expanded to include regional marketing and technical assistance to employers that faced local transportation and parking concerns.

In 1997, TriMet and the Department of Environmental Quality (DEQ) became the region's key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule. In 1999, the TDM program became more coordinated with the addition of an Employee Commute Options (ECO) clearinghouse, a regional telecommuting program, a local TDM program in Wilsonville, a TMA Assistance Program, and a Region 2040 Initiatives program. Also in 1999, the City of Portland restructured its Transportation Bureau to include a Transportation Options Division, and other counties and cities in the region began actively working with businesses and communities to address the need for transportation options.

ANALYSIS/INFORMATION

1. Known Opposition

No known opposition.

2. Legal Antecedents

Legislation related to the proposed legislation, including federal, state, or local law and Metro resolution numbers, include the following:

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 Subcommittee. The TPAC TDM Subcommittee was established by Metro Resolution 92 – 1610. Oversight for the development and evaluation of TDM strategies, and formation of final recommendations to TPAC, JPACT and Metro Council concerning TDM planning, programming and implementation activities were assigned to the Subcommittee.

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.

Transportation Management Association (TMA) Policy. The policy basis and funding strategy for TMAs was adopted through Metro Resolution No. 98 – 2676. Metro Resolution No. 99- 2864 allocated \$1 million in regional funding to existing and new TMAs for FY 2000 to 2003. Metro Resolution No. 02 – 3183 revised TMA policy by calling for balanced support of existing TMAs with the start-up of new TMAs, and for funding new and innovative TMA programs.

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.

3. Anticipated Effects

The restructured RTO program will become more collaborative at marketing, implementing and evaluating transportation demand management programs funded through the Metropolitan Transportation Improvement Program (MTIP). RTO is the newly envisioned program for transportation demand management because it more clearly articulates the intention of the program – to provide travel options to all residents of the region.

4. Budget Impacts

There may be future impacts to Metro’s budget in order to implement the preferred funding scenario C, dependent upon how local matching funds are calculated. Future FTE and RTO program match issues will be addressed through the annual Unified Work Program for Transportation Planning in the Portland/Vancouver area.

RECOMMENDED ACTION

Approve Resolution No. 04 – 3400.

Regional Travel Options Program 5-Year Strategic Plan

Strategic Plan + Appendix A



December 2003

A consensus of the members of the Regional Travel Options Subcommittee



Table of Contents

I.	Overview and Purpose	.....	1
II.	Background	.....	1
III.	2003 – 2008 Program Priorities	.....	3
	A. Travel Options 101		
	B. Connection to other land use and transportation program		
	C. Program Components		
	i. Goal 1: Marketing	.....	6
	ii. Goal 2: Senior Management	.....	12
	iii. Goal 3: Evaluation	.....	13
	iv. Goal 4: Organizational Structure	.....	14
	v. Goal 5: Policy Development	.....	15
	vi. Goal 6: Funding	.....	16

Appendix A: Budget/Funding Scenarios

Appendix B: Detailed Program Work Plans

Appendix C: Past Program Expenditures

I. OVERVIEW AND PURPOSE

After 10 years of experience implementing TDM programs, the TDM Subcommittee sees an opportunity to restructure the regional Transportation Demand Management program to become more collaborative at marketing, implementing and evaluating TDM programs funded through the Metropolitan Transportation Improvement Program (MTIP). The number one priority for the TDM Subcommittee is to create a message and image that increases the impact of the program and allows decision makers and the general public better understand the program.

The Regional Travel Options Program is Metro's newly envisioned program for transportation demand management because it more clearly articulates the intention of the program – to provide travel options to all residents of the region. However, it is still very apparent to the TDM Subcommittee that few people, even those working in the transportation planning field, understand exactly what that means.

Regional travel options include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking and telecommuting. In order increase the number of people using these travel options, the region needs to

- develop a marketing message and communications plan that supports local program implementation
- develop regional policies that support more people using travel options
- evaluate program impacts that can be used to refine programs and marketing strategies, and
- identify new funding sources that can be used to expand the travel options program over the next five years.

The Regional Travel Options program is primarily a marketing program that works directly with people to find the best option for them for any number of trips they make throughout the day. The focus in the past ten years has been reducing drive alone commute trips, specifically working with ECO employers to reduce commute trips as required by the ECO Rules. The TDM Subcommittee would like to take a new direction to more actively market travel options through a unified regional marketing program.

This strategic plan provides a new vision and proposed direction for the Regional Travel Options program that emphasizes working more collaboratively to implement a highly integrated program that has measurable results and tangible impacts on the environment, the economy and the quality of life of all people in the region.

II. BACKGROUND

During the past 10 years the regional TDM program has advanced from a policy and planning program towards a regionally coordinated implementation program. In 1992, the TPAC Transportation Demand Management (TDM) Subcommittee was established by Metro Resolution to develop project selection criteria and oversee program implementation activities for the first two rounds of Congestion Mitigation and Air Quality (CMAQ) projects in the region. The mission of the TDM Subcommittee is to reduce the need to drive by advocating for TDM in the region, developing funding and policy recommendations to TPAC and coordinating regional TDM programs. In order to achieve this mission, the TDM program at TriMet was expanded to include regional marketing and technical assistance to employers that faced local transportation and parking concerns.

In 1997, TriMet and the Department of Environmental Quality (DEQ) became the region's key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule. In 1999, the TDM program became more coordinated with the addition of an Employee Commute Options (ECO) clearinghouse, a regional telecommuting program, a local TDM program in Wilsonville, a TMA Assistance Program, and a Region 2040 Initiatives program. Also in 1999, the City of Portland restructured its Transportation Bureau to include a Transportation Options Division, and other counties and cities in the region began actively working with businesses and communities to address the need for transportation options.

The TDM Subcommittee has identified a need to revise the mission to reflect the new strategic direction to create a more collaborative approach to program development, marketing, implementation and evaluation. This plan details the TDM Subcommittee's strategy for implementing a newly envisioned Regional Travel Options program.

III. 2003 – 2008 PROGRAM PRIORITIES

A. Travel Options 101

Regional Travel Options include transit, vanpools, carpools, bicycling, walking and telecommuting. The newly envisioned Regional Travel Option Program will promote these options through the following programs:

- Collaborative Marketing Program – regional message and identity for program
- Regional Rideshare Program – market carpool and vanpool to employers
- TriMet Employer Outreach Program – markets travel options to employers and schools
- SMART TDM Program – markets travel options to employers and schools
- Regional TMA Program – markets travel options to employers to catalyze economic development in Region 2040 centers
- Region 2040 Initiatives Grant Program – pilots innovative projects
- Regional Telework Program – market telework to employers
- Business Energy Tax Credit Program – provides tax incentives to employers implementing travel option programs

Bicycling and walking are promoted through policies in the Regional Transportation Plan and local Transportation System Plans. The City of Portland Transportation Options program has a fully staffed Transportation Options program that researches, develops and implements innovative projects to local residents. Some of these programs are funded through the Region 2040 Initiatives program to assess their potential implementation in other Region 2040 centers.

B. Connections to other regional land use and transportation goals

The RTO program is becoming increasingly connected with related regional planning efforts such as 2040 Centers, transit-oriented development, corridor planning and community health.

2040 Centers

The Regional Travel Options program is an economic development tool for regional centers and industrial areas. RTO strategies support economic growth in centers by freeing up land currently used for parking for jobs and housing and by increasing the capacity of current transportation infrastructure thereby saving millions of dollars in costly road expansion projects. A study by the Lloyd District TMA found that over \$170 million in parking infrastructure costs could be saved using more cost effective RTO strategies. TMAs provide local leadership, which is one of the most critical components of developing successful community centers. TMAs provide a connection between businesses and the community that acts as a catalyst for economic development and add value to infrastructure investments, both of which provide positive community benefits.

Regional centers are intended to be places where people can take transit, walk and bicycle to destinations within the center. The RTO program, specifically TMAs, TravelSmart and land use policies can be used to increase the number of people bicycling and walking in centers. The Region 2040 Initiatives grant program provides funding for innovative programs such as TravelSmart.

Corridors

Major corridor studies are conducted by state or regional agencies working in partnership with local governments to develop appropriate transportation strategies and solutions when safety, mobility and congestion standards are exceeded. The RTO Program will work with each of these corridor studies to identify opportunities to implement strategies that increase the capacity and prevent the unnecessary expansion of roadways. Strategies identified in the I-5 Trade Corridor study completed in 2002 included, enhanced vanpool service, education and outreach, transit pass subsidies, TMAs and promotion of carpoolmatchNW.org. Another tool that is proving to be useful in changing travel behavior is TravelSmart, which is an innovative program that targets those people who are looking for alternatives to driving and provides them with information and incentives to leave their cars at home.

Transit Oriented Development

Transit oriented developments are intended to increase ridership on transit by building housing and jobs in close proximity to transit lines. However, it is not expected that all trips will be made on transit so it is essential to provide other alternatives. TODs typically have reduced parking requirements, which assumes that not all residents will own cars. By providing a wide range of options (e.g., FlexCar, free bicycles or bicycle storage, and information about how to access the various services provided within the community on foot) beyond transit we can work to increase the mobility of residents while reducing the number of car trips within the community.

TriMet's Transit Investment Plan

Fast, reliable and safe transit service is one of the critical components of implementing successful travel option programs. In areas where transit service is not convenient, accessible and safe other strategies such as carpools and vanpools can be used until additional transit service coverage, frequency and availability is provided. TriMet's Transit Investment Plan (TIP) provides a framework for how transit investments will be made over the next five years. The TIP focuses on specific corridors and focus areas in conjunction with regional priorities set out in the Region 2040 Growth Concept and the Regional Transportation Plan. Travel options programs can be used to better leverage and add value to transit investments. The RTO program will work with TriMet to enhance travel options programs in targeted corridors and focus areas.

Community Health

There is renewed interest in physically active modes including walking and bicycling primarily due to the Center for Disease Control and the Robert Wood Johnson Foundation's leadership in addressing the negative health implications of our auto-oriented communities. Regional partners recently received a grant from the Foundation to increase physical activity, including walking and bicycling for everyday needs and activities, in Lents Town Center, Interstate corridor and Damascus. The Regional Travel Options program will work with partners and local leaders to make stronger connections between land use, transportation and health throughout the region and within the 2040 centers.

Air Quality

Motor vehicles are the largest single source of air pollution in the Portland area. Under the Department of Environmental Quality's (DEQ's) ECO program, employers with more than 50 employees at a work site must provide commute alternatives to employees designed to reduce the number of cars driven to work in Portland and surrounding areas. ECO is one of several strategies in a federally-required plan to keep the air clean in the Portland area. This plan was adopted by the Environmental Quality Commission on July 12, 1996 after public comment. The

plan helps the region prevent adverse health impacts, avoid additional industrial growth impediments, avoid sanctions on federal transportation funds and reduce traffic. The RTO program will continue to work with DEQ to monitor progress towards reducing commute trips and the resulting improvement.

Water Quality

By slowing the need for road expansion the RTO program reduces the amount of impervious street surfaces being added to the system. Stormwater runoff from street rights of way is the number one cause of water quality degradation in urban areas. Reducing the number of people driving prevents the expansion of roadways, which in turns prevent the amount of impervious surface being added to watersheds. Metro's Green Streets program addresses water quality and runoff issues associated with existing and new street rights-of-way through innovative street designs. The RTO program will work with the Green Streets program, and other programs that work to improve water quality, to promote alternative street designs that reduce the impact of streets on water quality.

C. Regional Travel Options Program Components

Mission

The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region.

- Goal 1** Develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region.

- Goal 2** Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

- Goal 3** Develop performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

- Goal 4** Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

- Goal 5** Develop regional policies that integrate RTO programs into other regional land use and transportation programs including the Centers Program, TOD Program, Corridors program, water quality programs and TriMet's Transit Investment Plan.

- Goal 6** Develop a funding plan that helps create a sustainable Regional Travel Options program.

Since each program has a unique way of operating, each has its own strategies and actions that help to achieve overall regional goals listed above. The next section provides more detailed information about program goals, strategies, actions and impact. The strategies and actions are prioritized for each of the program components. The impacts of each program are not

cumulative as they all work together to reduce vehicle miles traveled. The number one priority for the evaluation program is to develop a tool or series of tools for measuring the impact and cost effectiveness of each program. The program costs are based on the preferred funding scenario as seen on page 3 of Appendix A.

Goal 1 Develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region.

The RTO Collaborative Marketing Campaign is the number one priority for the next three years. The Campaign will work to coordinate all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people traveling around the region. The regional Campaign will support the projects & messages currently being implemented by the partners and will be a clearinghouse of information that helps people learn about and access the options available to them.

There is an exciting opportunity for the newly envisioned Collaborative Marketing Campaign to work closely with Metro’s Community Media Project, “Zig Zag: Real Stories, New Angles,” a program that seeks to broaden the discussion of transportation issues through personal stories told by people living in the region. The RTO Campaign will assist in the creation of a resource guide for the Zig Zag community screening events and will provide a venue for ongoing discussions during the two-year awareness campaign that will kickoff in Spring 2004. The impacts of the campaign will be measured by a pre and post campaign survey to determine if there has been a significant change in people’s awareness and behavior.

Strategy 1 Initiate a broad based Regional Travel Options Marketing campaign that invites people to think about how they travel around the region resulting in a measurable increase in the use of travel options over a two year period.

- Action 1** Create a RTO Marketing manager position at Metro to coordinate RTO marketing efforts, raise awareness about travel options and measure the degree to which awareness is increasing.
- Action 2** Develop a region-wide RTO image and message delivery strategy that more actively engages the general public and enhances local and regional program implementation activities.
- Action 3** Create a series of position papers that explain the connection between travel options and health, transit, development patterns, air and water quality, and getting to school, work and shopping destinations throughout the region.
- Action 4** Develop a unified RTO presence at special events, conferences and school events.
- Action 5** Create a regional clearinghouse that includes a staffed informational hotline, an interactive website and a mobile program information unit.

Action 6 Develop a Regional Transportation Education Program over the next five years that works directly in schools throughout the region.

Action 7 Integrate Travel Smart as a one on one home-based marketing program in key regional centers.

Employer Outreach Program

TriMet works with employers in the Portland Region to help them develop successful travel options programs that reduce the number of vehicle miles traveled by reducing drive alone commute trips. TriMet’s Employer Outreach program targets the region’s ECO affected employers (>50 employees) and provides the same services for employers with fewer employees. The Employer Outreach program includes marketing representatives, a rideshare specialist, employer materials and the emergency ride home program.

Strategy 1 Increase the number of employer programs from 772 to 1,156 over the next 5 years resulting in a reduction of approximately 59,000,000 VMT.

Action 1 TriMet will continue to use a variety of methods to promote TDM to employers including one-on-one communication, direct mailing, transportation fairs, public events, informational materials, website, transit pass programs and the Emergency Ride Home program.

Action 2 Develop and implement a targeted marketing effort for large non-participating employers in key regional centers and TIP target areas.

Program Impact

Year	Number of Employer Programs*	Number of Employees Impacted	Annual VMT Reduction** (miles)	Program Cost	Cost per VMT Reduced
2002-03	676	237,000	38,000,000	\$555,073	Base Year
2003-04	96	23,000	5,730,000	\$443,164	\$0.08
2004-05	96	23,000	6,730,000	\$385,649	\$0.06
2005-06	96	23,000	6,500,000	\$404,929	\$0.06
2006-07	96	23,000	6,500,000	\$425,175	\$0.07
2007-08	96	23,000	7,000,000	\$446,433	\$0.06

* TriMet works with TDM partners to market transportation programs to employers, regardless of boundaries (for example, with TMAs).

** Average weekday reduction (from aggregate of ECO survey commute mode data) x 261 total weekdays. Because of partnerships, VMT reductions somewhat overlap with estimates found in other partner’s three-year plan documents.

Regional Rideshare Program

The Rideshare program includes both vanpool and carpool programs. In the next three years the program will be developed into a bi-state program that coordinates with CTRANs rideshare program. CTRAN recently completed a vanpool market analysis that calls for a doubling of their fleet in the next year. A marketing program will be developed to actively market carpooling and vanpooling in targeted areas throughout the region. These areas will be identified in 2004 through a regional rideshare market analysis. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travelshed for the Portland

area reaches a radius of 50 miles or more from the central city. This analysis will address the appropriate organizational structure for this program.

Strategy 1 Increase the number of carpools by 1,060 a year and vanpool groups by 30 a year in the next 5 years resulting in an annual VMT reduction of approximately 18 million miles.

Action 1 Establish a baseline number of people carpooling and vanpooling in the region and develop a measuring device that can be used to track progress.

Action 2 Conduct a regional rideshare market analysis that identifies target areas for marketing carpool and vanpool

Action 3 Determine the appropriate structure for the program.

Action 4 Create a new marketing program for Ridesharing that targets audiences in specific locations identified in Action 2.

Action 5 Enhance CarpoolmatchNW.org to better serve vanpool matches.

Program Impact

Fiscal Year	New Carpools	New Vanpools	Reduced Trips/day (Carpool)	Reduced Trips/day (Vanpool)	Reduced Trips/yr (Carpool)	Reduced Trips/yr (Vanpool)	Annual VMT Reduction* (Carpool)	Annual VMT Reduction** (Vanpool)	Annual Funding	Cost/trip reduced
01-02	294	10	500	100	131,000	26,200	3,117,800	2,358,000		
02-03	588	20	1000	200	262,000	52,400	6,235,600	4,716,000	\$245,140	\$0.78
03-04	882	30	1500	300	393,000	78,600	9,353,400	7,074,000	\$206,720	\$0.44
04-05	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$715,660	\$1.30
05-06	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$646,755	\$1.18
06-07	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$436,000	\$0.79
07-08	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$436,000	\$0.79
08-09	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$436,000	\$0.79
09-10	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$436,000	\$0.79
10-11	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	\$436,000	\$0.79
Totals	9,176	270	15,600	2,700	4,087,200	707,400	97,275,360	63,666,000		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 262 workdays per year, 2.7 passengers per carpool=reduction of 1.7 trips per carpool, 90 miles round trip mileage per vanpool, 14 miles round trip mileage per carpool.

SMART/WILSONVILLE Travel Options Program

South Metro Area Rapid Transit (SMART) is operated by the City of Wilsonville and provides five fixed routes with connections to other transit districts. The travel options program works directly with employers to help set up programs to reduce the number of auto commute trips. The travel options program also conducts outreach to residents and schools to encourage great use of travel options.

Strategy 1 Increase the number of people using travel options by 1% a year over the next 5 years.

Action 1 Determine how to measure the impact of outreach efforts over the next year and secure additional funding to perform a program evaluation.

Action 2 Promote travel options to employers through transportation fairs, information packets, training transportation coordinators, new employee packets and at regional events.

Action 3 Promote travel options to the residents of Wilsonville through county fairs, webpage, newspaper, newsletters, and one on one travel planning and informational displays.

Action 4 Promote travel options to schools through the Art on the Bus competition and outreach programs.

Action 5 Work with local planning department to ensure that travel options are supported in local planning processes.

Program Impact

Year	Number of Residents Participating	Number of Employees Participating	Number of Schools Participating	Annual VMT Reduction (miles)	Program Cost	Cost per Ride Reduced
2002-03	Not measured	Not measured	Not measured	Not measured	\$55,000	Not measured
2003-04	TBD	TBD	TBD	TBD	\$88,400	TBD
2004-05	TBD	TBD	TBD	TBD	\$89,700	TBD
2005-06	TBD	TBD	TBD	TBD	\$91,400	TBD
2006-07	TBD	TBD	TBD	TBD	\$94,194	TBD
2007-08	TBD	TBD	TBD	TBD	\$96,966	TBD

Regional TMA Program

The TMA Program operates under the policy direction as provided in Metro Resolutions No.98-2676 and No.02-3183. TMAs are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs provide important leadership development in Region 2040 centers that catalyze economic and community development. The TDM Subcommittee recognizes that there may be other mechanisms for promoting TDM in some 2040 centers besides TMAs. These opportunities will be explored with local jurisdictions as a part of the regional evaluation program.

Strategy 1 Reduce the number of people driving alone and catalyze economic development in regional centers and industrial areas by enlisting the business community in creating transportation options for their communities and employees.

Action 1 Work with the TMAs over the next 3 years to develop Region 2040 commute mode split targets and create performance measures that track progress towards these targets.

- Action 2** Include Travel Options element in center and industrial area master plans (with cost analysis of projected growth with and without travel options effort).
- Action 3** Continue to develop TMAs in regional centers where significant transportation investments are being made. Over the next 3-5 years this will include proposed TMA start-ups in Hillsboro, Washington Square, Gateway and Oregon City (if they are ripe for TMA formation).
- Action 4** Develop business plans for each TMA that support the unique character of each regional center and industrial areas. Attached work plans detail the strategies currently being used by each TMA recognizing that they are at different levels of development.
- Action 5** Conduct a study to better understand why the Tualatin and Columbia Corridor TMAs were not successful and use the results to create new criteria for the TMA approval process.
- Action 6** Identify the appropriate agency to administer the TMA program (a 20% match is needed) as it transitions from TriMet by July 2004.

Program Impact

Year	Number of Existing TMAs	Number of TMAs in Exploratory Phase	Number of TMA member organizations*	Number of Employees Impacted	Annual VMT Reduction** (miles)	Program Cost	Cost per reported VMT reduced
02-03	5	1	Not reported	Not reported	Not measured	\$250,000	N/A
03-04	5	1	266	45,317	6,135,450	\$181,250	Base year
04-05	6	2	297	49,233	1,071,163	\$348,750	\$0.37
05-06	8	1	332	54,070	1,070,975	\$392,500	\$0.47
06-07	9	1	364	58,293	1,081,685	\$507,000	\$0.47
07-08	10	1	397	62,670	1,092,502	\$511,500	\$0.33

*based on information submitted by the TMAs. Does not include new TMAs.

** data submitted by Swan Island TMA, Gresham Regional Center TMA and Lloyd District TMA. All TMAs will begin to report these numbers by FY05.

Region 2040 Initiatives Grant Program

The Region 2040 Program is a grant program currently administered by TriMet with oversight by the TDM Subcommittee. It is expected that program administration will transition out of TriMet and into Metro over the next 3 years. The grant funds are allocated annually and fund transportation demand management services and programs. The grant program is funded with federal Congestion Mitigation/Air Quality (CMAQ) program monies that have been allocated through the Transportation Priorities process.

All jurisdictions, transportation management associations and nonprofit organizations with the mission of implementing transportation demand management programs located within Metro's boundary are eligible for the funds.

Projects funded with Region 2040 Program monies must strive to reduce the number of people driving alone and/or daily vehicle miles traveled within a specific geographic location. Examples of past program investments, current programs and future program prioritizing for Region 2040 Initiatives is included in Appendix C.

Program Impact

Year	Number of Programs	Annual VMT Reduction* (miles)	Program Cost**	Cost per VMT Reduced
2002-03	3	575,750	\$203,250	\$0.35
2003-04	7	1,300,000	\$118,000	\$0.09
2004-05	5-10	1,300,000	\$269,000	\$0.21
2005-06	5-10	1,300,000	\$269,000	\$0.21
2006-07	5-10	1,300,000	\$269,000	\$0.21
2007-08	5-10	1,300,000	\$269,000	\$0.21

*Numbers were not provided by all programs in 2002. Projections are based on future program reporting improvements as required in the new grant application.

**Program requires a 20% match

Regional Telework Program

The Oregon Department of Energy (ODOE) works with employers in the Portland metro region to develop successful telework programs. Telework is working at home or at location closer to home instead of traveling to the traditional place of business. Telework reduces the number of vehicle miles traveled by eliminating or reducing commute trips. ODOE provides technical assistance and outreach services including education and training materials, consultations, presentations, training sessions, and an extensive telework website.

Strategy 1 Increase the number of telework programs by 60% in the next year and 20% a year for the next 4 years.

Action 1 Regional Marketing Program will market telework to the 2,000 eligible employers in the region with a target of enrolling 35%.

Action 2 Oregon Department of Energy will continue to provide high quality technical support and outreach services for employers with telework programs, including educational materials, training sessions, consultation and the telework website.

Program Impact

Year	Telework Programs	Number of Teleworkers	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2002-03	340	6,000	7,560,000	\$100,000	Base year
2003-04	50	500	630,000	OOE funded*	
2004-05	55	550	693,000	\$30,000	\$0.04
2005-06	60	605	762,300	\$30,000**	\$0.04
2006-07	66	665	837,900	\$60,000**	\$0.07
2007-08	72	731	921,060	\$60,000**	\$0.07

*Assumes that Collaborative Marketing Program is marketing telework to employers.

** For technical support only. The dollars for marketing are in the Regional Marketing Program.

Business Energy Tax Credits

The BETC Program is a one-of-a-kind in the nation. Oregon employers can get a state tax credit for projects that reduce vehicle miles traveled by employees, students, clients, or customers. Eligible projects include telework, transit passes, commuter pool vehicles, financial incentive programs, bicycles, Transportation Management Association (TMA) dues, parking cash out and FlexCar.

Strategy 1 Increase the number of Oregon employers taking advantage of BETC program by 35% over the next 5 years.

Action 1 Market BETC to all employers in the region through the Employer Outreach Program and the Collaborative Marketing Program.

Action 2 ODOE will continue to provide technical assistance to employers wanting to take advantage of the program including finding pass through partners and submitting applications.

Program Impact:

Year	New BETC Projects Approved	Total Project Implementation Costs (submitted)	Annual VMT Reduction* (miles)	Total Gallons of Gas Saved**	Cost of Program	Cost per VMT reduced***
2002-03	45	\$2,700,000	59,000,000	3,000,000	\$100,000	N/A
2003-04	27	\$1,900,000	35,000,000	1,700,000	ODOE	N/A
2004-05	14	\$900,000	18,000,000	900,000	\$30,000****	N/A
2005-06	17	\$1,100,000	22,000,000	1,100,000	\$30,000***	N/A
2006-07	15	\$1,400,000	20,000,000	1,300,000	\$60,000	N/A
2007-08	16	\$1,600,000	20,000,000	1,200,000	\$60,000	N/A

*In 2002 59,000,000 VMT reduced x 60% increase in 2003. A 20% increase is assumed for the next three years. 68% of the projects approved are for transit passes. The remaining 32% includes telework, bicycles, commuter pool vehicles, incentives and TMA dues.

** Based on an average gas mileage of 20mpg

***The program itself does not reduce VMT but provides the incentive to businesses to reduce their VMT.

****Assumes Regional Travel Options Marketing program is actively marketing BETC

Goal 2 Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Strategy 1 Convene senior managers on a bi-monthly basis over the next year in order to solicit their input and provide guidance on RTO programs and activities.

Strategy 2 Convene senior managers quarterly in years 2-5 to stabilize RTO program funding and support.

Goal 3 Refine performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

The RTO evaluation program will continue to improve our method for collecting, analyzing and reporting data for each RTO program. The annual evaluation report will be used to refine program development, marketing and implementation so that we can invest limited program dollars in the most cost effective ways.

- Strategy 1** Report annually on RTO program activities and impact. This could result in an evaluation oversight position at Metro.

- Strategy 2** Survey all ECO affected employers in the next five years and increase the number of ECO employers that are in compliance with ECO Rules from 50% to 75%.
 - Action 1** Develop and distribute a set of tools that employers can use to implement the most effective Employee Commute Options (ECO) programs increasing the impact of programs on VMT reduction.

 - Action 2** Create a central database for the RTO program that can be used in conjunction with other regional travel behavior data to monitor each program component.

 - Action 3** Process ECO surveys annually and report on compliance with ECO rule.

 - Action 4** Continue to develop and enhance the ECO survey database so data can be evaluated much faster and with a higher degree of accuracy.

- Strategy 3** Evaluate all 38 Region 2040 Centers on an annual basis to determine progress towards non-SOV modal targets.
 - Action 1** Work with regional partners to establish commute mode split targets for regional centers preparing for TMA development.

 - Action 2** Identify land use measures that can be monitored and related to travel behavior data.

 - Action 3** Develop and implement a targeted marketing effort for large non-participating employers in key regional centers.

Strategy 4 Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.

Action 1 Work with each travel options program to identify survey questions, run stated preference surveys for selected sets, and derive the cost effectiveness of each program.

Action 2 Conduct a survey to derive quality predictors of how people respond to various travel options programs.

Action 3 Develop a set of predictors for the effectiveness range of travel options programs.

Year	Cost of Program	Percent of Total Program*
2002-03	\$122,000	9%
2003-04	\$113,000	9%
2004-05	\$280,281	11%
2005-06	\$421,595	15%
2006-07	\$270,000	10%
2007-08	\$270,000	10%

*based on Preferred funding scenario total budget.

Goal 4 **Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.**

Strategy 1 Create a Regional Travel Options Marketing Program Manager position at Metro to coordinate regional programs.

Strategy 2 Convene senior managers on a bi-monthly basis in the first year and quarterly for the next 5 years to oversee and advise the RTO subcommittee on strategic plan implementation.

Strategy 3 Convene the Regional Travel Options Subcommittee and working groups (e.g., marketing, performance measures, rideshare, policy development, funding) monthly to support stronger partnering and coordination.

Strategy 4 Conduct an annual retreat to review strategic plan (mission, goals, strategies, performance measures) and update work programs accordingly.

Goal 5 Develop regional policies that integrate RTO programs into other land use and transportation programs including Metro’s Centers Program, TOD Program, Corridors program and TriMet’s Transit Investment Plan.

- Strategy 1** Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).
- Strategy 2** Develop policies in regional centers and industrial areas that create more travel options for people coming to and traveling within the area.
- Strategy 3** Use the results from the SW Portland TravelSmart pilot program to develop a plan for implementing TravelSmart in regional centers over the next 5 years.
- Strategy 4** Develop a policy that would require a certain percentage of upfront funding for TDM strategies on all corridor projects. The approach could be similar to TravelSmart where existing travel behavior is assessed and those who are interested in shifting modes would be targeted. A policy is needed to allocate funding for an upfront TDM program that can be used to increase capacity of the corridor and prevent costly roadway expansion.
- Strategy 5** Work with Metro’s TOD program to develop a Travel Options package to provide to residents and employees living and working in transit oriented developments.
- Strategy 6** Work with Metro’s Goal 5 and Green Streets programs to help make a stronger policy connection between reducing the amount of roadway expansion and improving water quality.
- Strategy 7** Work with local jurisdictions to monitor the implementation of TDM strategies as a part of their development codes. Other strategies include enhancing land use policies, strengthening local incentive programs, and working with Flex Car to reduce parking requirements for developments.
- Strategy 8** Research other policy options that help to make RTO programs more effective such as, implementing HOV lanes and bridge tolls, Fannie Mae’s Smart Commute program, Metro’s Livable Streets program, Motorist Education, and improving freight policies.

Goal 6 Develop a funding plan that helps create a more sustainable Regional Travel Options program (see Preferred Scenario C in Attachment A).

Strategy 1 Secure additional program funds for Regional Marketing Program through ODOT Transportation funds.

ODOT's 04-06 budget includes \$1.5 million in federal STP funds to be used on transportation demand management measures around the state. A percentage of this funding may be available to the Metro region in Spring 2004.

Strategy 2 Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).

Strategy 3 Research other Potential Funding Sources including BETC, Climate Trust, EPA, OTIA, STIP and corridor projects

Appendix A: Funding Scenarios

Three funding scenarios are offered up in Appendix A. Scenario A reflects a budget that maintains current levels of funding. Scenario B reflects a budget that reduces program funding by \$500,000 in 2006 – 2008 and Scenario C reflect the preferred program funding scenario.

Appendix B: Detailed Work plans

Each Regional Travel Options program completed a detailed work program for the next 3-5 years. These work plans will be adjusted annually to reflect unexpected funding and policy changes. In order to be most effective and because the RTO program leverages so many private dollars, a stable regional funding source is needed to continue to implement successful travel options programs.

Appendix C: Past Program Expenditures

Information about past program expenditures for the TMA program and Region 2040 Initiatives program are provided. Funding decisions for both programs are made by the TDM Subcommittee and presented to TPAC on an annual basis.

Appendix A

Funding/Budget Scenarios

Budget/Funding Scenarios for the Regional Travel Options Program

December 2003

Regional Transportation Options (RTO) Program Scenario A	Financially Constrained A: Program restructured with \$100,000 Reserve Retained			
	FY04/05	FY05-06	FY06-07	FY07-08
<i>Includes Allocated CMAQ Funds Only</i>				
Collaborative Marketing Program: Funds a collaborative marketing campaign that is an "umbrella" for all travel options programs	\$98,280	\$98,280	\$130,000	\$130,000
TriMet Employer Program: Supports employee outreach and Transit PASSport marketing program	\$303,000	\$303,000	\$195,000*	\$195,000*
Regional Rideshare: Combines Vanpool Program and CarpoolMatchNW into new structure that collaborates with regional partners including CTRAN.	\$426,000	\$245,720	\$379,500	\$379,500
SMART TDM: Employer outreach and marketing program for Wilsonville area.	\$55,000	\$55,000	\$55,000	\$55,000
Regional TMA Program: Promote travel options to employers as a catalyst for economic development while creating local leadership in key regional centers.	\$281,250	\$221,750	\$409,000	\$409,000
<u>Ongoing:</u> Distributes funds between 5 existing TMAs	\$125,000	\$125,000	\$150,000	\$150,000
<u>Startup:</u> Exploratory and 3-year formation funding for two to three new TMAs in Centers and Industrial Areas	\$156,250	\$96,750	\$150,000	\$150,000
<u>Innovative:</u> Funds new, expanded and innovative programs at existing TMAs	Not funded	Not funded	\$109,000	\$109,000
Region 2040 Initiatives Program: A grant program that funds innovative SOV reduction projects	\$312,000	\$312,000	\$269,000	\$269,000
Regional Telework Program: Markets telework to regional employers using ODOE online tools and training.	Not funded	Not funded	\$15,000	\$15,000
Regional Business Energy Tax Credit program: Promotes BETC to regional businesses as an incentive for developing travel options programs for employees.	Not funded	Not funded	\$15,000	\$15,000
Regional Evaluation Program: ECO data analysis and database management, annual programevaluation report, performance measures for all program elements	\$100,000	\$100,000	\$100,000	\$100,000
I-5 Corridor TDM Plan: Develops a strategy for implementing TDM in corridors.			\$56,000	\$56,000
Interstate TravelSmart: Pilot #2 for implementing home based marketing program in key corridors and centers.			\$150,000	\$150,000
TOTAL	\$1,575,530	\$1,335,750	\$1,773,500	\$1,773,500

*Does not fully fund program as currently implemented.

RTO Program Scenario B	Financially Constrained B: Program restructured with \$500,000 Reserve Transferred to TriMet Frequent Bus Program			
<i>Includes Allocated CMAQ Funds Only</i>	FY04/05	FY05-06	FY06-07	FY07-08
Collaborative Marketing Program: Absorbs some of the cuts proposed above while moving towards more collaborative marketing program. Focus on message development and delivery.	\$98,280	\$98,280	\$37,500	\$37,500
TriMet Employer Program: Program cuts proposed in 06/07 and in 07/08 reflect transfer of \$500,000 to TriMet Frequent Bus Program	\$303,000	\$303,000	\$37,500	\$37,500
Regional Rideshare: Same as Scenario A	\$426,000	\$245,720	\$379,500	\$379,000
SMART TDM: Same as Scenario A	\$55,000	\$55,000	\$55,000	\$55,000
Regional TMA Program: Same as Scenario A	\$281,250	\$221,750	\$409,000	\$409,500
Ongoing	\$125,000	\$125,000	\$150,000	\$150,000
Startup	\$156,250	\$96,750	\$150,000	\$150,000
Innovative	Not funded	Not funded	\$109,000	\$109,000
Region 2040 Initiatives Program: Same as Scenario A	\$312,000	\$312,000	\$269,000	\$269,000
Regional Telework Program: Same as Scenario A	Not funded	Not funded	\$15,000	\$15,000
BETC Program: Same as Scenario A	Not funded	Not funded	\$15,000	\$15,000
Regional Evaluation Program: same as Scenario A	\$100,000	\$100,000	\$100,000	\$100,000
I-5 Corridor TDM Plan: Same as Scenario A			\$56,000	\$56,000
Interstate TravelSmart: Same as Scenario A			\$150,000	\$150,000
TOTAL	\$1,575,530	\$1,335,750	1,493,500	1,493,500

RTO Program Scenario C	Preferred: Collaborative RTO Program			
<i>Includes Allocated CMAQ Funds Plus Funding Not Yet Identified</i>	FY04/05	FY05-06	FY06-07	FY07-08
Collaborative Marketing Program: Scenario A + moving entire RTO marketing program into collaborative structure to fund a 3 year campaign.	\$485,000	\$491,000	\$150,000	\$150,000
TriMet Employer Outreach Program: Continues employment site contacts, adds marketing rep. Assumes 5% inflation in FY07 & 08.	\$385,649	\$404,929	\$425,175	\$446,433
Regional Rideshare: Scenario A + expanded bi-state marketing and implementation in more focus areas.	\$715,660	\$646,755	\$436,000	\$436,000
SMART TDM: Scenario A + enhanced employer outreach and marketing program to leverage commuter rail investment.	\$89,700	\$91,400	\$94,194	\$96,966
Regional TMA Program: Scenario A + additional startups in key centers and industrial areas as coordinated with Metro's Centers program.	\$348,750	\$392,500	\$507,000	\$511,500
Ongoing: Scenario A + support for one additional TMA	\$100,000	\$125,000	\$125,000	\$175,000
Startup: Scenario A + TMA startups in 2 regional centers	\$248,750	\$267,500	\$242,000	\$196,500
Innovative: Same as Scenario A	Not funded	Not funded	\$140,000	\$140,000
Region 2040 Program: Same as Scenario A.	\$312,000	\$312,000	\$269,000	\$269,000
Regional Telework: Scenario A + enhanced marketing program.	\$30,000	\$30,000	\$60,000	\$60,000
BETC Program: Scenario A + enhanced marketing program	\$30,000	\$30,000	\$60,000	\$60,000
Regional Evaluation Program: Scenario A + survey research in Centers, RTO program performance measures, regional database and analysis	\$280,281	\$421,595	\$270,000	\$270,000
I-5 Corridor TDM Plan: Same as Scenario A			\$56,000	\$56,000
Interstate TravelSmart: Same as Scenario A			\$150,000	\$150,000
Subtotal: Collaborative Program	\$2,677,040	\$2,820,179	\$2,477,369	\$2,505,899
Programs submitted by TriMet *				
TriMet Targeted Travel Training: Increase transit ridership among seniors and people with disabilities (funding not identified).		\$75,000	\$78,750	\$82,687
TriMet Targeted Pedestrian Safety Campaign (funding not identified)		\$36,000	\$37,800	\$39,690
TOTAL	2,677,040	2,931,179	2,593,919	2,628,276

*Funding decision made by the RTO Subcommittee

Regional Travel Options Program 5-Year Strategic Plan

Appendix B and C



December 2003

A consensus of the members of the Regional Travel Options Subcommittee



Appendix B

Detailed Work Plans

Collaborative Marketing Campaign

Three-Year Workplan

December 2003

Goal 1 Develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region.

Program Summary:

The RTO Collaborative Marketing Campaign is the number one priority for the next three years. The Campaign will work to coordinate all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people travelling around the region. The regional Campaign will support the projects & messages currently being implemented by the partners and will be a clearinghouse of information that helps people learn about and access the options available to them.

Strategic Direction:

There is an exciting opportunity for the newly envisioned Collaborative Marketing Campaign to work closely with Metro’s Community Media Project, “Zig Zag: Real Stories, New Angles,” a program that seeks to broaden the discussion of transportation issues through personal stories told by people living in the region. The RTO Campaign will assist in the creation of a resource guide for the Zig Zag community screening events and will provide a venue for ongoing discussions during the two-year awareness campaign that will kickoff in Spring 2004. The impacts of the campaign will be measured by a pre and post campaign survey to determine if there has been a significant change in people’s awareness and behavior.

- Strategy 1 Initiate a broad based Regional Travel Options Marketing campaign that invites people to think about how they travel around the region resulting in a measurable increase in the use of travel options over a two year period.
- Action 1 Create a RTO Marketing manager position at Metro to coordinate RTO marketing efforts, raise awareness about travel options and measure the degree to which awareness is increasing.
 - Action 2 Develop a region-wide RTO image and message delivery strategy that more actively engages the general public and enhances local and regional program implementation activities.
 - Action 3 Create a series of position papers that explain the connection between travel options and health, transit, development patterns, air and water quality, and getting to school, work and shopping destinations throughout the region.
 - Action 4 Develop a unified RTO presence at special events, conferences and school events.
 - Action 5 Create a regional clearinghouse that includes a staffed informational hotline, an interactive website and a mobile program information unit.

Action 6 Develop a Regional Transportation Education Program over the next five years that works directly in schools throughout the region.

Action 7 Integrate Travel Smart as a one on one home-based marketing program in key regional centers.

Detailed Work Program:

ACTIONS	IMPACT	WHO	'03-'04	'04-'05	'05-'06	'06-'07	'07-'08
Create a Regional Marketing Program manager position at Metro to coordinate creation of identity package and regional marketing campaign.	Measured through Regional Evaluation Program	Metro Marketing Manager	\$100,000	\$110,000	\$121,000	\$130,000	\$130,000
Create an RTO identity package including program name, logo, position papers, slogan and media messages and incorporate into other materials <ul style="list-style-type: none"> • Research and analyze attitude and awareness surveys, travelsmart results and other marketing data gathered in the region. • Conduct Focus Groups to determine which messages resonate with the general public and measure awareness • Finalize identity package 	Measured through Regional Evaluation Program	TriMet Metro Regional Partners	\$25,000	\$25,000	\$20,000	\$20,000	\$20,000
Launch a two-year Travel Options campaign in conjunction with the Community Media Project's Zig Zag, Real Stories, New Angles <ul style="list-style-type: none"> • Create timeline of all events that partners are involved in over the next two years • Launch Campaign Spring 2004 • Create a resource center guide • RTO Booth at events/conferences/schools • Create an RTO design award (like billboard program) • Solicit radio, tv and print ad media using position papers in identity package. Conduct a pre and post survey to measure the impact of the campaign.	Measured through Regional Evaluation Program pre and post survey	All regional partners with oversight from Metro Marketing Manager		\$350,000	\$350,000	Reevaluate need for ongoing campaign	
TOTAL			\$125,000	\$485,000	\$491,000	\$150,000	\$150,000

TriMet Employer Outreach Program

Three-Year Work Plan

December 2003

GOAL: Reduce the number of vehicle miles traveled by employees commuting to and from work by helping employers set up successful TDM programs.

Program Summary:

TriMet works with employers in the Portland Region to help them develop successful TDM programs that will reduce the number of vehicle miles traveled by reducing drive alone commute trips. TriMet's Employer Outreach Program targets the region's ECO affected employers (51 or more employees), yet still provides the same level of assistance for employers with fewer employees. TriMet has been working with area employers since the early 1980's. At that time, agency staff worked with employers to establish employee transportation programs that consisted of transit planning and carpool matching assistance. Once the ECO Rule became effective (1996), the agency's TDM program evolved to include more outreach and technical assistance for employers and regional partners in the Portland area. The current program reflects many components from its predecessor, i.e., educational programs and training materials, individual consultations, presentations, and employer/employee training sessions (Transportation Fairs, Transportation Coordinator training, etc.). The TDM programs TriMet currently promotes are designed to "... enhance mobility and support the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling, and walking options,"¹ as well as vanpool, flexcar, compressed work week and flexible work hours. During the 2001-2003 fiscal years, TriMet helped 866 Portland area employers set up, or maintain, TDM programs that impacted 190,520 employees in the region.

Strategic Direction:

There are approximately 50,000 employers in the Portland Metropolitan Area. In FY03, employment levels fell to 777,195 which is below the last low recorded in 1998. Consequently, the Employer Outreach program has seen employment levels drop at many employers, which means fewer employees are reached for every employer the program works with. Currently, 580 employers participate in alternative mode programs marketed by TriMet. This includes over one-third of all ECO-affected employers, along with 271 employers with 50 or fewer employees. In total, over 143,000 employees benefit from TriMet's employer programs. While this represents solid market penetration and results in significant impact, there is still tremendous market potential for reducing SOV through employers, particularly in regional centers. Regional centers represent a special opportunity since they are called out in the Regional Transportation Plan (RTP).

At the current funding level, TriMet will continue to aggressively market TDM programs by working with employers, employees, regional partners, and the community at large. TriMet marketing and technical staff will provide one-on-one assistance to employers and employees by conducting Transportation Coordinator (TC) training classes, transportation fairs, promotional events in the community, and by offering technical assistance to regional partners, TMAs, and employers struggling to meet their ECO targets. TriMet's Employer Outreach Program will continue to rely heavily on resources beyond CMAQ grant funding; that is, we will rely on materials and services from the Legal, Finance, Marketing, and Operations Divisions within the agency. In addition, the agency is committed to providing materials and services above and

¹ Metro 2000 RTP, Page 1-60

beyond the agency's 10.23% CMAQ match agreement to promote regional TDM programs -- not only at employer sites, but at promotional events throughout the community as well. Should the current level of funding for the agency's TDM program cease at the end of this fiscal year (June 2004), it is unlikely that TriMet's general fund would be able to absorb the scope of the Employer Outreach Program and it would cease to exist. Consequently, it would be necessary for another entity to find a way to accommodate the needs of the region's 50,000 employers and their employees.

Over the next year, we anticipate 96 new employers on transportation programs, with approximately 23,000 employees who will reduce approximately 4,400,000 vehicle miles during 2003-04. With current funding maintained, we anticipate _ percentage point increase in non-SOV trips for all employees on transportation programs for 2004-05 and 2005-06.

Detailed Work Plan (Projections are based on results for '02-'03: 676 employment sites had transportation programs, 166,000 employees.)

ACTIONS	WHO IMPLEMENTS	'03-'04		'04-'05		'05-'06	
		COST	Impact/ Objective	COST	IMPACT OBJECTIVE	COST	Impact/ Objective
Employer Outreach 6.5 FTEs: Personal Services Materials & Services Dedicated to providing TDM consultation services to employers to help them meet their ECO goals by investing in the most beneficial transportation program for their employees and the region.	TriMet Marketing Staff	\$367,285 \$348,685 \$18,600	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 772 sites on a TDM program (189,000 employees) Train 72 TC reps Enroll 350 TCIP members Provide 450 sites w/ECO survey assistance Support 375 w/ECO Planning Circulate 1,700 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation	\$385,649 \$366,119 \$19,530	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 868 sites on a TDM program (212,000 employees) Train 72 TC reps Enroll 370 TCIP members Provide 470 sites w/ECO survey assistance Support 400 w/ECO Planning Circulate 1,800 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation	\$404,929 \$384,425 \$20,507	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 964 sites on a TDM program (235,000 employees) Train 72 TC reps Enroll 390 TCIP members Provide 500 sites w/ECO survey assistance Support 425 w/ECO Planning Circulate 1,900 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation

			<p>Programs", "Commute Options", "Benefits of Leaving the Car," and "Save \$ on TriMet Passes"</p> <p><u>Conduct 100 Transportation Fairs</u> Work with 10,000 employees</p> <p>Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 800 visits to Employer Web Site Maintain 68,000 Employees/ERH Program Establish onsite displays at 140 Events w/employers, community, TMAs, colleges, Marquam Hill, and Business Associations</p>		<p>Programs", "Commute Options", "Benefits of Leaving the Car," and "Save \$ on TriMet Passes"</p> <p><u>Conduct 100 Transportation Fairs</u> Work with 10,000 employees</p> <p>Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 900 Visits to Employer Web Site Maintain 71,000 Employees/ERH Program Establish Onsite displays at 140 Events employers, community, TMAs, colleges, Marquam Hill, and Business Associations</p>		<p>Programs", "Commute Options", "Benefits of Leaving the Car," and "Save \$ on TriMet Passes"</p> <p><u>Conduct 100 Transportation Fairs</u> talk to 10,000 employees</p> <p>Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 1000 Visits to Employer Web Site Maintain 74,000 Employees/ERH Program Establish Onsite displays at 140 Events w/employers, community, TMAs, colleges, Marquam Hill, and Business Associations</p>
TOTAL		\$367,285		\$385,649		\$404,929	

Program Impact:

Year	Number of Employers Impacted*	# Employees Impacted	# Employees Impacted & Surveyed	Annual VMT Reduction**	Program Cost	Cost per VMT Reduced
2003-04	772	260,000	143,000	32,270,000	\$367,285	\$0.011
2004-05	868	283,000	166,000	39,000,000	\$385,649	\$0.010
2005-06	964	306,000	189,000	45,500,000	\$404,929	\$0.009

* TriMet works with TDM partners to market transportation programs to employers, regardless of boundaries (for example, with TMAs).

** Average weekday reduction (from aggregate of ECO survey commute mode data) x 261 total weekdays. Because of partnerships, VMT reductions somewhat overlap with estimates found in other partner's three-year plan documents.

Regional Vanpool Program Three-Year Workplan December 2003

GOAL: Ten new vanpools in the Portland-Vancouver metropolitan region each year over the next 8 years.

Program Summary:

TriMet currently operates 6 vanpool shuttles and 2 traditional vanpools. CTRAN operates 10 vanpools, including 9 traditional vanpools and 1 shuttle. CTRAN just completed a market analysis to determine the potential for vanpools in their service area. Initial findings show that there is a considerably large untapped vanpool market throughout the bi-state region including areas that fall outside of the Metro UGB.

Strategic Direction:

The primary objective over the next 3 years is to initiate a vanpool market analysis to determine what type of vanpool program should be promoted in the bi-state region, how much it will cost to implement that program and what agency/organization is best suited to operate the program. By July 2005, the TDM Subcommittee will have a clear sense of resource needs based on recommendations from the study.

In the next three years the Rideshare Program will be developed into a bi-state program that coordinates with CTRANs rideshare program. CTRAN recently completed a vanpool market analysis that calls for a doubling of their fleet in the next year. A marketing program will be developed to actively market carpooling and vanpooling in targeted areas throughout the region. These areas will be identified in 2004 through a regional rideshare market analysis. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travelshed for the Portland area reaches a radius of 50 miles or more from the central city. This analysis will address the appropriate organizational structure for this program as TriMet would like to transition out of rideshare program administration.

Detailed Work Program:

I. Initiate a vanpool market analysis and Implementation	GOAL	Who	'03-'04	'04-'05	'05-'06
Determine Travelshed for vanpool study		Partners/TDM Sub			
Begin vanpool project in Clark County, based on their market study results	Double current fleet	CTRAN/TriMet	\$300,000		
Refine Scope of Work for hiring a consultant to do a market study on selected travelshed area		Partners/TDM Sub	Sept - Jan		
Send out Request for Proposals		Partners/TDM Sub	March		
Review applications, select consultant, sign contracts		Partners/TDM Sub	May - June		
Hire consultant for study July 1, 2004 – June 30, 2005.	1 target area a	Partners/TDM		\$150,000	

Study elements would include: a) Determine baseline numbers for vanpools and carpools. b) Create an evaluation tool for the program c) Identify and begin one or two initial target areas. d) Develop Outcomes, Actions, Resources, Needs for program e) Determine appropriate organizational structure f) Develop funding strategy g) Develop marketing strategy h) Integration with existing vanpool programs	year	Sub		a.\$100,000	
Ongoing investment in TriMet Vanpool Shuttle Program	One new shuttle a year	TriMet	\$90,720	\$106,140	\$121,560
Evaluate initial Clark County project – January 2005		CTran/TDM Sub	\$8,000	\$5,000	
Integrate pilot project lessons learned into Vanpool program plan		Partners/TDM Sub			
Launch additional target areas – July 2005	One target area a year	TBD			\$100,000 per area
TOTAL			\$398,720	\$361,140	\$221,560

Fiscal Year	New Vanpools	Reduced Trips/day (Vanpool)	Reduced Trips/yr (Vanpool)	Annual VMT Reduction** (Vanpool)	Annual Funding	Cost/VMT reduced
01-02	10	100	26,200	2,358,000		
02-03	20	200	52,400	4,716,000	\$245,140	\$0.05
03-04	30	300	78,600	7,074,000	\$206,720	\$0.03
04-05	30	300	78,600	7,074,000	\$398,720	\$0.06
05-06	30	300	78,600	7,074,000	\$361,140	\$0.05
06-07	30	300	78,600	7,074,000	\$221,560	\$0.03
07-08	30	300	78,600	7,074,000	\$221,560	\$0.03
08-09	30	300	78,600	7,074,000	\$221,560	\$0.03
09-10	30	300	78,600	7,074,000	\$221,560	\$0.03
10-11	30	300	78,600	7,074,000	\$221,560	\$0.03
Totals	270	2,700	707,400	63,666,000		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 90 miles round trip mileage per vanpool, 14 miles round trip mileage per carpool.

CarpoolMatchNW Three-Year Workplan December 2003

Goal: To reduce 70,000 metric tons of CO₂ over the next eight years by adding 1500 daily carpool trips each year.

Program Summary:

CarpoolMatchNW.org is a self-serve Internet based service that will link riders and drivers from Salem to Vancouver, Washington. It addresses the three barriers to conventional carpool matching programs: It's anonymous, so that people can feel secure about finding fellow car and vanpoolers; It's user driven and doesn't depend on a coordinator to find suitable riders; It's fast and convenient. People can find other riders in a few days, not in weeks or months. This ride match program which allows registered users to enter relevant information about their commute, including destinations and travel times, then view a map which displays the locations of other registered users who share their commute. It is one of the first systems of its kind in the country. There are three major components to the website:

1. Technical
2. Customer service
3. Marketing

Strategic Direction:

The Partner Team (PDOT, TriMet, SMART, and C-TRAN) would like to expand the reach and visibility of the site to not only be more effective for carpool matches but for establishing vanpool matches. A regional rideshare study will be conducted in 2004 to determine the market potential for both vanpools and carpools and an effective organizational structure will be recommended. TriMet, CTRAN, SMART and the City of Portland will continue to promote the program in conjunction with other regional partners until the appropriate organizational structure is determined.

Detailed Work Plan:

I. Technical	2003 - 2004				2004 - 2005	2005 - 2006
	Currently Funded - CMAQ	In-Kind			Budget	Budget
		TriMet	PDOT	C-TRAN			Other
Goal: to ensure site runs well and is accessible						
Project Management	40,000				40,000	42,000
Site Maintenance	30,000				45,000	47,250
Site improvements – one-time trip component, improving admin. tool, translation, etc.			34,300		20,000	21,000
Monitoring and Verification			7,500		7,500	7,875
Subtotal	\$70,000		\$41,800		\$112,500	\$118,125

II. Customer Service	2003 - 2004					2004 - 2005	2004 - 2005
	Currently Funded - CMAQ	In-Kind				Budget	Budget
		TriMet	PDOT	C-TRAN	Other		
Goal: to keep database current and maintain existing 1,700 Users							
Customer Service (TriMet)		80,000*				80,000	84,000
Customer Service (C-TRAN)				65,000			68,250
Subtotal		\$80,000*		\$65,000		\$80,000	\$152,250

III. Outreach and Marketing	2003 - 2004					2004 - 2005	2005 - 2006
	Currently Funded - CMAQ	In-Kind				Request	Request
		TriMet	PDOT	C-TRAN	Other		
Goal: to encourage people to register. See specific targets for individual activities							
One to one outreach, e.g. Transportation Coordinator campaigns, t-fairs, promotions to Users, outreach to magnet schools GOAL: 2,630 registrants	17,300	10,000*	10,000 40,000	2,500	12,000	67,925	66,070
General Public Marketing e.g. bus backs, drive time sponsorships, promoting translated site GOAL: general publicity, 5 major sponsors, 2.5 million impressions, 800,000 people driving alone	28,700	14,500 6,000*	44,725	10,710 plus graphic artist's time	6,000	94,095	88,750
Partnership Development Goal: 500+ registrants	could be part of project manager's job if technical is funded						
Subtotal	\$46,000	\$30,500	\$94,725	\$13,210	\$18,000	\$162,020	\$154,820

TOTAL BUDGET	\$116,000	110,500	\$136,525	\$78,210	\$18,000	\$354,520	\$425,195
---------------------	------------------	----------------	------------------	-----------------	-----------------	------------------	------------------

*CMAQ dollars currently directed through TriMet

Program Impact

Fiscal Year	New Carpools	Reduced Trips/day (Carpool)	Reduced Trips/yr (Carpool)	Annual VMT Reduction* (Carpool)	Annual Funding	Cost/VMT reduced
01-02	294	500	131,000	3,117,800		
02-03	588	1000	262,000	6,235,600	\$245,140	\$0.04
03-04	882	1500	393,000	9,353,400	\$459,235	\$0.05
04-05	1059	1800	471,600	11,224,080	\$354,520	\$0.03
05-06	1059	1800	471,600	11,224,080	\$425,195	\$0.04
06-07	1059	1800	471,600	11,224,080	\$425,195	\$0.04
07-08	1059	1800	471,600	11,224,080	\$425,195	\$0.04
08-09	1059	1800	471,600	11,224,080	\$425,195	\$0.04
09-10	1059	1800	471,600	11,224,080	\$425,195	\$0.04
10-11	1059	1800	471,600	11,224,080	\$425,195	\$0.04
Totals	9,176	15,600	4,087,200	97,275,360		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 262 workdays per year, 2.7 passengers per carpool=reduction of 1.7 trips per carpool.

SMART/Wilsonville Travel Options Program

Three-Year Workplan

December 2003

Goal: Increase the number of people using travel options by 5% over the next 5 years.

Program Summary:

The objective of the SMART Options program is to reduce the proportion of single-occupancy vehicle trips in Wilsonville by encouraging employees and residents to use alternatives to driving alone. The ultimate goal is to meet the modal split targets set for Wilsonville in the Regional Transportation Plan. The SMART Options program employs three primary approaches in pursuit of this goal:

1. Outreach and Marketing - Program staff works with local businesses and community groups to develop and promote TDM strategies and to market TDM to employees and residents. Transportation fairs, vanpool development, and guaranteed ride home programs are some of the products of this approach.
2. Planning ^ Program staff participates in the local planning process for the City of Wilsonville Transportation System Plan and for the development review process. These efforts are crucial to ensure that future policies and developments will support and encourage the use of alternative transportation modes.
3. Coordination ^ The SMART Options program does not have its own carpool matching program, nor does the SMART transit system take Wilsonville employees everywhere they need to go. Coordination with other agencies and transportation service providers in the region is a high priority for the SMART Options program in order to leverage investments and improve regional drive-alone rates, avoid duplication of efforts, and facilitate information exchange.

Strategic Direction:

The SMART Options program is relatively new. The program has successfully created positive working relationships with the largest employers in Wilsonville through ongoing contact and transportation fairs. These relationships need to be maintained, but the program also needs to focus on the mid-sized employers and to increase its name recognition among all employers and the general public. Schools also remain a relatively untapped potential for the program. Over the next five years, the program will focus on marketing the program more broadly, while still maintaining existing employer programs.

Detailed Work Program:

I. General Outreach		Budget		
Action	Goal/Target	'03 -'04	'04-'05	'05-'06
Design, produce, and distribute program materials, including brochures and flyers.	Increase public awareness of TDM program. Distribute 1,000 per year. Target: General public/employers	\$3,900	\$1,500	\$1,500
<i>Walk to Lunch</i> Event. Restaurants provide discounts for people who walk to lunch and are wearing a <i>Walk to Lunch</i> button. Additional publicity from press coverage.	Employees and residents who walk to lunch. 250 participants per year. Target general public and employers for participation.	\$1,800	\$1,800	\$1,800
Booth at Clackamas County Fair. Primarily focused on promoting transit and Carpool Match NW, but also providing information on bicycling and walking, and connections to other transit systems (SMART, Canby Area Transit, Tri-Met, C-Tran, and Salem Area Transit)..	Increase use of transit and Carpool Match NW. 75 additional bus riders and 50 additional carpool sign-ups. Target: General public	\$4,500	\$4,725	\$4,950
Write articles for Boones Ferry Messenger about TDM program activities, events, and opportunities.	Public awareness of employer efforts and TDM program. 12 articles per year Target: General Public	\$1600	\$1650	\$1700
Create and maintain SMART TDM Webpage with information on individual transportation options and employer programs.	Provide general and employer TDM information and links to other services, such as Carpool MatchNW. 50 hits per month.	\$2,000	\$500	\$500
New resident welcome meetings.	Provide new residents with information on transportation alternatives before they get into the habit of driving alone. Four events per year, with 120 new residents attending.	\$1,600	\$1,650	\$1,700
Action	Goal/Target			
Create new resident welcome packets to distribute to apartment managers.	Same as above. Distribute 250 packets per year.	\$3,000	\$3,100	\$3,200
Create informational displays for Chamber of Commerce, Library, and City Hall.	Six displays per year. General public/employers	\$500	\$500	\$500
Subtotal		\$18,900	\$15,425	\$15,850

II. Employer Outreach		Budget		
Action	Goal/Target	'03 –'04	'04-'05	'05-'06
Contact employers by visiting the work sites and calling them to let them know about the TDM program.	150 personal contacts and 200 phone contacts per year.	\$1,300	\$1,300	\$1,300
Organize employer transportation meetings. Employers get together to discuss transportation issues that affect their work sites.	Gain a clear understanding of the transportation issues that concern employers. Create the opportunity for employers to work together on solutions. Four meetings per year with 25 employers participating.		\$4,500	\$4,500
Hold transportation fairs at work sites to provide information on all transportation alternatives.	12 per year, reaching 5,000 employees.	\$6,500	\$6,700	\$6,900
Assist employers in developing and implementing TDM plans for their worksites.	Six TDM plans per year.	\$3,600	\$3,600	\$3,600
Create and distribute employer information packets.	100 per year	\$3,500	\$500	\$500
Compile and create training and reference materials for transportation coordinators in Wilsonville.	50 per year	\$5,500	\$750	\$750
Hold Transportation Coordinator Training classes.	4 per year	\$3,500	\$3,500	\$3,500
Create and distribute bulletin board updates, new employee packets, and articles for company newsletters	12 bulletin board updates 12 articles	\$2,500	\$2,000	\$2,000
Promotion of regional and community events, such as Carfree & Carefree, Bike Commute Challenge, Earth Day etc, SMART Employer of the Year, etc.	500 employees per year participate in the events	\$9,000	\$9,000	\$9,000
Guaranteed Ride Home program. Reach agreement with taxi company; print guidelines; distribute to employers.	Sign up 10 employers per year.	\$2,000	\$1,500	\$1,500
SMART Employer of the Year award program.	Reward one employer for outstanding efforts in their TDM program. Get additional publicity from media release.	\$400	\$400	\$400
Subtotal		\$36,500.00	\$33,750.00	\$33,950.00

III. School Outreach		Budget		
Action	Goal/Target	'03 –'04	'04-'05	'05-'06
Art on the Bus competition in the schools. Children create artwork that illustrates the importance of transportation options. The three winning art works are incorporated into a buswrap.	Get children to think about transportation options by describing them in drawings. Create community awareness of transportation options via the traveling artwork on the bus. 150 elementary and middle school participants per year.	\$6,000	\$6,200	\$6,400
Develop school outreach program based on existing successful programs and pilot programs.	Involve teachers and students in solving real-life transportation problems in the context of math, science, and other curricula. 500 students per year participate.		\$6,500	\$6,500
Subtotal		\$6,000.00	\$12,700.00	\$12,900.00

IV. Planning and Coordination		Budget		
Action	Goal/Target	'03 –'04	'04-'05	'05-'06
Ensure that TDM provisions are included in development conditions for new developments in Wilsonville	All new developments in Wilsonville are required to support TDM at their worksites by posting information, submitting TDM plans, and providing adequate facilities for bicyclists, pedestrians, and transit.	\$3,000	\$3,000	\$3,000
Work with Wilsonville Planning staff to ensure that TDM is supported in the planning process.	Ensure that Transportation Systems Plan (TSP) amendments, code amendments, and pedestrian/bike plans adequately support TDM.	\$7,500	\$7,725	\$8,000
Write articles for weekly "FYI" newsletter to the Wilsonville City Council.	Ensure that City Councilors are aware of TDM issues and activities. 30 articles per year.	\$2,500	\$2,600	\$2,700
Coordinate program activities with other regional groups, transit districts, and jurisdictions.	Create a unified message, coordinate activities, and prevent unnecessary duplication of effort.	\$14,000	\$14,500	\$15,000
Subtotal		\$27,000.00	\$27,825.00	\$28,700.00

Total for all SMART TDM Programs	\$88,400	\$89,700	\$91,400
---	-----------------	-----------------	-----------------

Regional TMA Startups

Five-Year Workplan

December 2003

GOAL: Establish new TMAs in Regional Centers and key Industrial/Employment areas over the next 3-5 years.

Program Summary:

TMAs are the Region's key vehicle for engaging the business community in creating transportation options for their communities and employees. TMAs are, in effect, small businesses, and trip reduction and environmental concerns, while mandated by law, are not compelling reasons for the private sector to invest in transportation options. The role of TMAs is to provide *low cost solutions to transportation capacity challenges*, i.e. how to get more goods and services or customers and employees to and from businesses without incurring the monumental costs of new lanes, roads and parking garages. TMAs advance Metro's 2040 vision by helping the business community achieve growth without overwhelming the region's transportation infrastructure. TMAs are key tools for Metro's 2040 vision and must be supported financially and politically to be effective.

Strategic Direction:

The following tasks need to be completed in order to accurately measure the success of any TMA and travel option strategies in 2040 centers:

- Establish agreed to commute mode-split (market share) targets for 2040 centers and Industrial areas with associated costs and interim benchmarks and direct local jurisdictions to partner in achieving agreed to mode-split targets
- Include Travel Options element in center and industrial area master plans with cost analysis of projected growth with and without travel options effort.
- Support existing and new TMAs with business plan development
- Coordinate regional transportation investments, i.e. light rail, commuter rail, rapid bus, with TMAs, local jurisdictions and Regional Travel Options program.
- Include economic development as key element of regional travel options marketing campaign.

Implications:

The TDM Subcommittee makes final recommendations on TMA Startup once the feasibility study has been completed. This budget shows the long-term financial implications of TMA startups. Implications on ongoing funding include \$24,750 per TMA startup. Projecting these assumptions out to 2010, the ongoing regional investment will be \$297,000/year to support 12 TMAs in regional centers and industrial areas.

Detailed Work Program:

Regional TMA Program Budget December 2003

FY 2003-04	FY2004-05	FY2005-06	FY2006/2007	FY2007/2008
Swan Island TMA \$25,000	Swan Island TMA \$25,000	Swan Island TMA \$25,000	Swan Island TMA \$25,000	Swan Island TMA \$25,000
Lloyd District \$25,000	Lloyd District \$25,000	Lloyd District \$25,000	Lloyd District \$25,000	Lloyd District \$25,000
Gresham \$25,000	Gresham \$25,000	Gresham \$25,000	Gresham \$25,000	Gresham \$25,000
WTA \$25,000	WTA \$25,000	WTA \$25,000	WTA \$25,000	WTA \$25,000
Clackamas TC TMA \$50,250	Clackamas TC TMA \$24,750	Clackamas TC TMA \$25,000	Clackamas TC TMA \$25,000	Clackamas TC TMA \$25,000
	Troutdale \$67,500	Troutdale \$50,250	Troutdale \$24,750	Troutdale \$25,000
	Lake Oswego \$67,500	Lake Oswego \$50,250	Lake Oswego \$24,750	Lake Oswego 25,000
		Hillsboro \$67,500	Hillsboro \$50,250	Hillsboro \$24,750
			Washington Square \$60,000	Washington Square \$55,000
				Gateway Regional Center \$60,000
		North Portland/I-5/Interstate/Rivergate \$67,500	North Portland/I-5/Interstate/Rivergate \$50,250	North Portland/I-5/Interstate/Rivergate \$24,750
Startup TMAs	Startup TMAs	Startup TMAs	Startup TMAs	Startup TMAs
Lake Oswego \$32,000	Hillsboro \$32,000	Washington Square \$32,000	Gateway Regional Center \$32,000	Oregon City Regional Center \$32,000
	North Portland/I-5/Interstate/Rivergate \$32,000			
Special Studies				
	TMA "Failure" Study \$25,000			
Total	\$182,250	\$348,750	\$392,500	\$367,000
				\$371,500

Ongoing Funding					
Ongoing Funding Budgeted		\$100,000	\$125,000	\$125,000	\$175,000
Ongoing Funding Available		\$125,000	\$125,000	\$150,000	\$150,000
Balance		\$25,000	\$0	\$25,000	(\$25,000)
Startup Funding					
Startup Funding Budgeted		\$248,750	\$267,500	\$242,000	\$196,500
Startup Funding Available		\$156,250	\$96,750	\$150,000	\$150,000
Balance		(\$92,500)	(\$170,750)	(\$92,000)	(\$46,500)
TMA Innovative Program					
Funding Budgeted				to be submitted through TMA process	
Funding Available				\$140,000	\$140,000
Balance					

Planned TMAs identified in the RTP (no funding has been committed for exploratory or the 3-year formative step)

Washington Square Regional Center*
 Beaverton Regional Center*
 Hillsboro Regional Center*
 Gateway Regional Center
 Oregon City Regional Center
 North Macadam (Portland Central City)
 Milwaukie Town Center
 Downtown Portland (Portland Central City - between I-405 and River)**

* These Regional Centers are within the boundary of the WTA TMA.

** Exploratory study completed in 2000; advancement to 3-year formative step not recommended at that time.

Other Potential TMAs identified by TDM Subcommittee:

PDX TMA
 North I-5 Trade Corridor TMA

Lloyd District TMA
Three-Year Workplan
December 2003

GOAL: To support the efficient, safe and fluid movement of employers, visitors and residents, from and within the Lloyd District consistent with the district's economic and environmental health.

Program Summary:

The Lloyd District TMA provides a broad range of programs and services to building owners, employees and employees located in the Lloyd District. These include transit, bicycle, pedestrian and rideshare programs as well as outreach and educational assistance to businesses and individuals. The LDTMA also coordinates district events and supports a Board and committee structure that facilitates policy and advocacy positions of the organization on state, regional and local transportation issues.

Strategic Direction:

The strategic direction of the LDTMA over the next three years is to continue to increase the "market share" of non-SOV trips to the Lloyd District in a manner that assures a balance of access options in the Lloyd District. The Lloyd District is committed to attracting and locating nearly 17,000 net new employees in the district by the year 2015. The work of the LDTMA is directed to facilitate the development of the Lloyd District as an attractive, vital and competitive place to do business. Strategically developing access options, programs and strategies will assist property owners, businesses and employees in choosing access options that are the most cost effective and efficient.

Detailed Work Program:

I. TO IMPLEMENT PROGRAMS AND STRATEGIES THAT ALLOW THE LLOYD DISTRICT TO ACHIEVE ITS CONSENSUS MODE-SPLIT GOALS			BUDGET			
TASK	GOAL	WHO	IN-KIND	'03-'04	'04-'05	'05-'06
TMA programs for transit: PASSport, T-Fairs, employer/employee assistance, transportation store, transportation investment fund and transportation committee.	40% transit/6,000 passports	TMA Staff, Board	\$30,000 BID \$35,000 Meters	\$16,000	\$16,000	\$16,000
Pedestrian programs: Pedestrian Committee, crosswalk safety improvements, awareness programs, walking map, GIS program, improved sidewalk amenities	5% commute trips	TMA staff Ped. Committee	\$7,500 BETC fund \$10,000 BID \$5,000 meters			
Bicycling programs: 14 events, Bicycle committee, bike	10%	TMA staff	\$15,000 Meters	\$4,500	\$4,500	\$4,500

box program, transportation store, interactive bike map, safety and anti-theft programs, education and incentive programs	commute trips	Bike Committee	\$7,500 BETC \$10,000 BID			
Ride Share programs: Carpool program, Flexcar incentive, transportation store, Transportation Committee support	10% commute trips	TMA Staff Flexcar Transportation committee	\$10,000 BID \$5,000 Meters	\$4,500	\$4,500	\$4,500
District Transportation Advocacy: Streetcar, Lloyd Crossing, Wayfinding, Light rail, transit service delivery, liaison w/ LDCA and adjacent neighborhood associations	17,000 net new jobs	TMA Board TMA Staff Committees	\$25,000 BID \$15,000 Meters			
Special Projects: Underwriting CTRAN 157, transit trackers, marketing and communications, infrastructure investments, studies and research	Support all goals	TMA Board TMA Staff	\$175,000 BETC \$30,000 Commissions			
TOTAL			\$75,000 BID \$75,000 meters \$190,000 BETC \$30,000Commissions	\$25,000	\$25,000	\$25,000

Program Impact:

Year	TMA Members	Number of employees represented	Non-SOV mode split	Annual VMT Reduction (miles)*	Program Cost	Cost per VMT Reduced
2003-04	55	8,000	55%	746 per capita or 3.73 million VMT	\$25,000	\$0.01
2004-05	58	8,075	52%	760 per capita or 3.8 million VMT	\$25,000	\$0.01
2005-06	61	8,150	50%	775 per capita or 3.88 million VMT	\$25,000	\$0.01

*Based on survey sample of approximately 5,000 district employees

Swan Island TMA Three-Year Workplan December 2003

GOAL: In order to facilitate the continuing growth and success of Swan Island, the Swan Island TMA works to improve the movement of goods and people in the most effective way by expanding the area's transportation options.

Program Summary:

The Swan Island TMA's current program includes

- transit improvements, including TriMet service upgrades due in 2004,
- rideshare programs including the Swan Island Evening Shuttle, the Clark county vanpool, carpool incentive and preferential carpool parking, and
- bike/ped capital improvements and marketing programs including "Going to the River," and the recently launched "Swan Island Bluff to River Initiative."

The challenges on Swan Island include:

- Free parking at all organizations
- Little or no transit service to portions of the area
- Poor bike and pedestrian access from adjacent neighborhoods

The opportunities on Swan Island include:

- Interstate MAX opening in Spring 2004
- Adjacent affordable neighborhoods
- Portland River Renaissance & Bureau of Environmental Services projects
- Large number of Clark county residents commute to the island

Strategic Direction:

Once Interstate MAX is in operation, SITMA will shift our focus from our "Get On Board!" campaign to

- Organizing vanpools for employees beyond the reach of transit,
- Creating Location Efficient Living options for Swan Island employees and residents of adjacent neighborhoods, and
- Implementing the Swan Island Bluff to River Initiative for better bike/pedestrian access for jobs and recreation through restored habitats.

Finally, we will look at the potential for an expanded TMA in North Portland that would include Rivergate, Lower Albina, and the Interstate and I-5 Corridors. The North Portland TMA work program would include the following elements:

- Clark County Vanpool Campaign: three new vanpools in 2004-05.

- North Portland Location Efficient Living: 25 employees who rent to ownership in North Portland, 25 employees relocated to N. Portland.
- Swan Island Bluff to River Initiative: preliminary design and secured funding for 3 top projects: BES CBO, River Renaissance and Metro
- North Portland TMA Exploratory: Expand TMA to include Rivergate, Lower Albina and Interstate and I-5 Corridors.

Detailed Work Program:

STRATEGY			BUDGET					
ACTIONS	OUTCOME/IMPACT	WHO IMPLEMENTS	'03-'04		'04-'05		'05-'06	
			OTHER FUNDING SOURCES	CMAQ Stabilization Funds	OTHER FUNDING SOURCES	CMAQ Stabilization Funds	OTHER FUNDING SOURCES	CMAQ Stabilization Funds
Current Carpool Incentive for shifts not served by transit	24 new carpools/yr	TMA, Parcel Delivery employers	\$6,000 TriMet JobAccess		\$10,000 TriMet Job Access		\$12,000	
Swan Island Evening Shuttle Add two evening runs in 2004	50% ridership growth/yr	TMA, TriMet, Swan Island employers	\$50,000 TriMet Job Access		\$60,000 TriMet Job Access		\$65,000	
Get On Board campaign to coincide with Interstate MAX opening 2003-4	50% increase in transit, rideshare and bike/walk	TMA, area businesses, TriMet	\$25,000 TDM 2040 grant 03-04					
On going Transit program: planning, promotion and advocacy	Include in above	TMA, TriMet and area businesses	\$12,500 TMA dues and TDM grant	\$12,500	\$27,500 TMA dues & TDM grant	\$12,500	\$22,500 TMA dues & TDM grant	\$12,500
Bike/Walk capital	Double bike and	TMA, PDOT,	\$12,500	\$12,500	\$27,500	\$12,500	\$22,500	\$12,500

projects: Going to the River and Bluff to River Initiative	walk mode share	River Renaissance, BES, Alta Planning	TMA BETC funds, \$250,000 BES CBO capital funds		TMA BETC funds, other City grants			
Proposed Clark County Vanpool campaign	3 new vanpools	C-Tran, TMA, TriMet, Area employers			\$25K TDM 2040 grant		\$30,000 TDM 2040 grant	
Location Efficient Living	50 employees in new N. Portland homes	TMA, PDC, Portland ONI, N. Portland neighborhoods, area employers			\$25K TDM 2040 grant		\$30,000 TDM 2040 grant	
North Portland TMA Feasibility Expand existing TMA to include Rivergate, Lower Albina and I-5 and Interstate Corridors		TDM Subcom, TMA, contractor			\$25K TMA Startup Funds		\$67,500 TMA Startup Funds	
TOTAL			\$316,000	\$25,000	\$200,000	\$25,000	\$249,500	\$25,000

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction* (miles)	Program Cost	Cost per VMT Reduced
2003-04	12	7,000	20%	2,400,000	\$91,000	\$0.04
2004-05	15	7,500	25%	1,000,000	\$225,000	\$0.23
2005-06	20	8,000	30%	1,000,000	\$274,500	\$0.27

* 1000 trips a day x 10miles x 240days

Clackamas Regional Center TMA
Three-Year Workplan
December 2003

GOAL: To promote the use of alternative forms of transportation, reduce congestion, and improve internal mobility; thereby providing reasonable and safe access for all to the Clackamas Regional Center business area.

Program Summary:

The CRC-TMA is currently partnering with large businesses in the CRC-TMA service area and identifying other potential partners. Many of our larger stakeholders are under-served by the current transportation system, but the CRC-TMA offers an employee shuttle to transport workers from Clackamas Town Center to the outlying employment areas. Due to the overwhelming employee participation, the CRC-TMA has made transportation fairs a priority at area businesses. Additionally, the CRC-TMA acts as a transportation information clearing house.

Strategic Direction:

Over the course of the next 3 to 5 years the CRC-TMA will continue to engage the business community in an effort to create strong partnerships that foster a positive dialogue between the public and private sectors as it relates to transportation and transportation demand management. Additionally, we will continue to operate the *Clackamas Link* shuttle service and make every effort to expand the service to enhance existing and planned fixed route transportation such as I205LRT. The CRC-TMA is the newest functioning TMA in the region, but our stakeholder group is working diligently to develop a detailed workplan for identifying our current mode splits and targets.

Detailed Work Program

I. TMA ADMINISTRATION/IMPLEMENTATION	Outcomes	Who	'03-'04	'04-'05	'05-'06
<ul style="list-style-type: none"> <input type="checkbox"/> Director <input type="checkbox"/> Clerical Assistance (40 hours/Month) <input type="checkbox"/> Printing support, publications,/other miscellaneous expenditures 	Office space, work station, etc.	TMA Partners: TriMet, North Clackamas Chamber, O.I.T., Clackamas County, LiveBridge, Kaiser Permanente.	\$7500 \$29,000 \$1,000 \$1,500	\$8,000 \$29,000 \$1,000 \$1,750	\$8500 \$29,000 \$1,000 \$2,000

<p>REGIONAL COORDINATION</p> <ul style="list-style-type: none"> ❑ Meet with TriMet, TDM Subcommittee, Clackamas County and others as needed/appropriate. 	<p>Achieve a <i>true</i> regional TDM program</p>				
<p>EMPLOYER PROGRAMS</p> <ul style="list-style-type: none"> ❑ Clackamas Link Shuttle Service ❑ Develop Online Newsletter for employers/employees ❑ Maintain/Promote TMA website ❑ One-one stakeholder outreach effort ❑ Monthly T-Fairs at area businesses (more often if needed/desired) ❑ CarFree/CareFree sponsorship ❑ Creation and subsequent updates of TMA’s “Is your business stuck in traffic” brochure ❑ Newsletter publication ❑ Grow TMA memberships and contributions ❑ Advocate for improved level of service for TriMet – in anticipation of I-205 LRT ❑ TMA Communications Programs – Brochures, other informational/educational pieces including maintenance and updates to the CRC-TMA website. 	<p>We are now at 75-100 trips each month, we are striving to reach 75-100 each day.</p> <p>Our goal is to reach all 8,000 employees within our service area. Direct mail, monthly meetings,</p> <p>Minimum of 12/year</p> <p>Mailed to 1,600 employers</p> <p>Quarterly Our goal is a 5% annual increase</p>		<p>\$20,000</p> <p>\$1,000</p> <p>\$3,000</p> <p>\$1,000</p> <p>\$2,000</p> <p>\$2,600</p> <p>\$6400</p>	<p>\$22,000</p> <p>\$1,100</p> <p>\$3,000</p> <p>\$1,100</p> <p>\$2,000</p> <p>\$1,500</p> <p>\$1,000</p>	<p>\$24,000</p> <p>\$1,200</p> <p>\$3,000</p> <p>\$1,200</p> <p>\$2,000</p> <p>\$1,750</p> <p>\$1,500</p>
<p>TOTAL</p>			<p>\$50,250 Startup \$24,750 Other*</p>	<p>\$24,750 Ongoing \$46,700 Other*</p>	<p>\$24,750 Ongoing \$50,400 Other*</p>

* Other funds are generated through membership dues, grant applications and TMA Innovative program funds.

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	15	3,000	TBD	TBD	\$50,250	TBD
2004-05	20	4,000	TBD	TBD	\$24,750	TBD
2005-06	25	5,000	TBD	TBD	\$24,750	TBD

Gresham Regional Center TMA
Three-Year Work Plan
December 2003

GOAL: To increase access and develop alternative options in the Gresham Regional Center through programs for transit, parking management, pedestrian environment improvements and business outreach.

Program Summary:

Linking the regional center together as an integrated economic entity focusing on transportation and access issues (i.e. parking, pedestrian environment, commute trip reduction, infrastructure and outreach and business assistance).

Strategic Direction:

To finalize the creation of an organization, with representative membership, promoting economic development and linkages to the Gresham Regional Center made through auto, transit, pedestrian, and bike/walk modes as well as through education, outreach and business assistance.

Detailed Work Program:

I. DEVELOP, IMPLEMENT, AND COMPLETE PROGRAMS THAT ACHIEVE CONSENSUS WORKPLAN OBJECTIVES OF THE HISTORIC DOWNTOWN AND THE LARGER REGIONAL CENTER			BUDGET			
TASK	GOAL	WHO	IN-KIND	'03-'04	'04-'05	'05-'06
<ul style="list-style-type: none"> • Monthly coordination with Regional TDM Program • Attend and coordinate with other TMAs as is appropriate at regional quarterly meetings 	Maintain regional coordination and resource sharing	TMA staff	2,000	750	750	750
Participate in web based carpool program	Continue on-going promotion campaign and web site link to increase new carpools by 10% per year	TMA staff State of Oregon. com	1,000	300	300	300
<ul style="list-style-type: none"> • Work with TriMet to improve frequency of transit service • Work with TriMet to assure easily accessible transit stops and improve lighting/ shelters/ safety 	Improve performance and efficiency of local transit	TMA staff Action Committee TriMet & City	4,000	2,000	2,000	2,000

	system					
Coordinate w/City of Gresham, TriMet, Region, and local businesses on transportation issues and task force meetings	On a monthly basis	TMA staff City liaison	10,000	4,000	4,000	4,000
TMA Business Climate Survey Development and Report	Once a year	Action Committee	3,000	2,500	2,500	2,500
Monthly meetings with TMA Action Committee	Increase number of monthly participants by 10% per year	TMA staff	6,000	1,500	1,500	1,500
Strategic Planning effort with GDDA Board	Develop revolving three-year work plan	TMA staff GDDA Board	8,000	3,500	3,500	3,500
Work with City, Town Fair and East Hill Church to develop access routes for pedestrians	Develop two access routes	City of Gresham Action Committee	3,000	1,200	1,200	1,200
Customer First program	Expand reach of program to the larger Regional Center by 10% per year	Action Committee Regional Center Stakeholders	4,250	2,000	2,000	2,000
Develop education/awareness program to communicate alternative options	Increase local awareness of transportation options for 250 people	Action Committee	5,000	3,500	3,500	3,500
Develop a work plan and implementation strategy with the City of Gresham to maintain downtown public parking supplies	Assume operational and maintenance control of downtown public parking supply	City of Gresham TMA staff Action Committee	4,000	3,500	3,500	3,500
Total			\$50,250	\$24,750	\$24,750	\$24,750

Program Impact

Year	TMA Members	Number of employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	156	2,317	436 (18.8%)	5,450	\$24,750	\$4.54
2004-05	172	2,658	529 (19.8%)	6,613	\$24,750	\$3.74
2005-06	189	2,920	607 (20.8%)	7,588	\$24,750	\$3.26

**WTA TMA
Three-Year Workplan
November 2003**

GOAL: To serve the transportation needs of west side employers through public/private partnerships that reduce traffic congestion, improve air quality, foster economic vitality, and improve quality of life.

Program Summary:

The WTA provides a range of programs and services to the employers of Washington County and subsequently to their employees. These programs include education, on-line services, advocacy, and outreach. The WTA also runs its' signature program, Car Free and Carefree, a commuter challenge for all employers and their employees in the Metro area.

Strategic Direction:

The direction for the next three years is to improve our partnership base and to expand our services to Washington Square and the City of Hillsboro.

Detailed Workplan:

I. EXPAND TMAS IN REGIONAL CENTERS WITHIN THE WTA TMA SERVICE AREA			BUDGET		
TASK	GOAL	WHO	'03-'04	'04-'05	'05-'06
Add a TMA representative to Washington Square	Leverage the commuter rail investment	WTA Washington Square Nimbus Business Center		\$32,000 TMA Startup funds	\$67,500
Add a TMA representative to Hillsboro	Leverage regional center development	WTA City of Hillsboro			\$32,000 TMA Startup funds

II. Ongoing WTA Activities and programs					
Expand membership Distribute Outreach materials Produce Bi-weekly newsflash for all ETC's Produce Bi-monthly newsletter Produce an ETC Transportation Fair	15 New members – 3years 150 ETC's on record 200 distribution 150	WTA	\$24,750 CMAQ TMA Educational Fund \$14,600	\$24,750 CMAQ TMA Membership Dues \$8,000	\$24,750 CMAQ TMA Membership Dues \$8,000
Car Free & Carefree	Reduce VMT by 20,000 miles each year	WTA Other TMA's Many Corporate Spomsors	\$50,000 Region 2040 Initiatives	\$52,500 Region 2040 Initiatives	\$55,125 Region 2040 Initiatives
III. Educational Grant	To Educate Washington County Employers on strategies of TDM and reduce VMT	WTA		\$14,600	
TOTAL			\$24,750 CMAQ \$50,000 Region 2040	\$56,750 CMAQ \$52,500 Region 2040	\$179,375

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	28	25000+	Not measured	Not measured	\$24,750*	Not measured
2004-05	32	27000+	Not measured	Not measured	\$24,750	Not measured
2005-06	37	30,000+	Not measured	Not measured	\$24,750	Not measured

* Only includes ongoing regional funding allocation. Eligible for Region 2040 and TMA Innovative Program funding.

Telework Program

Three-Year Work Plan

December 2003

GOAL: Increase the number of telework programs by 10% a year for the next 3 years resulting in a reduction in VMT of 762,300.

Program Summary:

For the past ten years, the Oregon Department of Energy (ODOE) has provided technical assistance and outreach services to organizations in the Portland region to develop successful telework programs. Program services include educational and training materials, consultations, presentations, training sessions and an extensive telework web site. Telework is working at home or a location closer to home instead of traveling to the traditional place of business. Telework reduces the number of vehicle miles traveled by eliminating or reducing commute trips. This program is not offered by any other organization in Oregon and is recognized as a leader in promoting and implementing successful telework programs.

As a part of the Metro 2001-2003 grant, ODOE provided .5 FTE to operate the telework program. During this time ODOE helped 340 Portland area employers set up telework programs. ODOE estimates that more than 6,000 employees from these organizations telework, resulting in an estimated VMT reduction of 84,000 miles annually. For the 2003-04 period, ODOE's Telework Program is not receiving funding from Metro to implement the telework program. ODOE has committed to funding .10 FTE for the remainder of the 2003-04 fiscal year, which is a significant reduction in the amount of effort and services available to work with businesses promoting telework in the Portland area. The Telework Program survey conducted in June 2003 states "If little or no funding is invested in telework outreach, strategies will be primarily passive (i.e. providing a web site, sending kits when requested), and it is unlikely that telework will continue to grow significantly." It will be critical for the Regional Travel Options marketing program to market telework to employers.

Strategic Direction:

ODOE contracted with the University of Oregon's Community Planning Workshop to conduct a survey to determine the effectiveness of the telework program. The survey reports that there are many employees interested in telework and many employers who might consider offering this work option in the future. It also recommends that public agencies continue to promote telework as a regional travel option that reduces vehicle miles traveled. ODOE has developed a comprehensive package of stand-alone tools to help employers set up successful telework programs, including an extensive web site. With these resources and an effective marketing program, employers will have the tools they need to set up successful telework programs.

ODOE estimate that there are approximately 2,000 employers in the Portland metro area that can take advantage of the telework program. ODOE, in conjunction with other regional marketing efforts, will work to contact all of these within five years with a goal of setting up programs with 35% of these employers.

At the current funding level, ODOE will provide .10 FTE. This will allow a staff person to work with a limited number of larger employers helping set up telework programs. ODOE will conduct train-the-trainer programs to increase the number of resources available to provide one-on-one assistance to employers. ODOE will rely heavily on the existing tools and our web site to help employers with telework rather than one-on-one assistance. The Collaborative Marketing Program will be responsible for the oversight of marketing telework to employers.

ODOE anticipates that 50 new telework programs with approximately 500 teleworkers will save about 7,000 vehicle miles during 2003-04. ODOE also anticipate a 10 percent increase in the number of telework programs each year for the next three years.

Detailed Work Plan

I. INCREASE THE NUMBER OF TELEWORK PROGRAMS	WHO IMPLEMENTS	IMPACT	'03-'04	'04-'05	'05-'06
Fund .10 FTE to: <ul style="list-style-type: none"> • Provide one-on-one consulting services to large Portland-area employers implementing telework • Provide telework resources and materials to employers • Maintain a web site for customers to access materials and products on line 	ODOE	10% increase in number of teleworkers per year	ODOE	\$10,000 (funds .10 of FTE)	\$10,000 (funds .10 of FTE)
Increase telework resources by conducting train-the-trainer workshops	ODOE, Tri-Met, TMA's		ODOE	ODOE	ODOE
Market telework to employers throughout the region	TriMet, TMAs, local jurisdictions		ODOE	ODOE	ODOE

Program Impact:

Year	Telework Programs	Number of Teleworkers	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2002-03	340	6,000	7,560,000	\$100,000	\$0.01
2003-04	50	500	630,000	OOE funded*	
2004-05	55	550	693,000	\$30,000	\$0.04
2005-06	60	605	762,300	\$30,000**	\$0.04
2006-07	66	665	837,900	\$60,000**	\$0.07
2007-08	72	731	921,060	\$60,000**	\$0.07

*Assumes that Collaborative Marketing Program is marketing telework to employers.

** For technical support only. The dollars for marketing are in the Regional Marketing Program.

Business Energy Tax Credit Program

Three-Year Workplan

December 2003

GOAL: Increase the number of Oregon employers taking advantage of BETC program from 72 to 103 in the next 3 years resulting in VMT reduction of 134,000,000 miles.

Program Summary:

Oregon businesses, non-profits, and government agencies are eligible to receive a state of Oregon income tax credit for investing in projects that reduce vehicle miles traveled by employees, students, clients, or customers. Eligible projects include telework, transit passes, commuter pool vehicles, financial incentive programs, bicycles, Transportation Management Association (TMA) dues, parking cash out and flexcar. The tax credit is 35 percent of the eligible project cost and is taken over five years. Projects less than \$20,000 take the credit all in one year. ODOE has targeted Portland-area employers affected by the ECO rules. There are currently no other state incentives available for employers providing alternative transportation programs for employees.

Since 1996, ODOE has approved 228 BETC transportation projects in the Metro area for more than \$11 million. These projects reduce approximately 216 million commute miles and save more than 10 million gallons of gas annually. In 2002, ODOE approved 45 BETC transportation projects in the Metro region totaling \$2.7 million. Employers received \$945,000 in tax credits for investing in projects that reduce employee transportation. These projects reduced about 59 million commute miles, saved 3 million gallons of gas and \$3.7 million in employee transportation expenses.

Strategic Direction:

The BETC Program is a one-of-a-kind in the nation. For the 2003-04 period, ODOE's BETC Program is not receiving funding from Metro. ODOE has committed to funding .15 FTE for the remainder of the 2003-04 fiscal year. The Metro grants for 2004-05 and 2005-06 will ensure funding/services for .15FTE. This significantly reduces the amount of effort and services previously available from ODOE to work with businesses promoting the BETC Program. This will pay for a staff person to serve on the Regional Travel Options Subcommittee and train and consult with transportation partners to market BETC. This proposal shifts marketing responsibility to the Collaborative Marketing Program. ODOE will cover all costs related to working directly with customers and processing tax credit applications.

ODOE is currently reviewing rules and will likely be expanding eligibility criteria that will significantly increase the number of transportation projects eligible for the BETC. With an effective marketing campaign, we anticipate a 60 percent increase in the number of BETC transportation projects approved for 2004. With continued marketing, we should see at least an annual increase of 20 percent in approved projects.

Detailed Work Plan:

I. Increase number of employers using BETC	WHO IMPLEMENTS	IMPACT	'03-'04	'04-'05	'05-'06
Fund .15 FTE to: <ul style="list-style-type: none"> • Work with Tri-Met, TMA's and other transportation organizations to market BETC to employers as an incentive to implement trip reduction programs. • Review and approve BETC transportation applications • Market BETC to employers throughout the region 	ODOE, TriMet, TMAs, local jurisdictions, Collaborative Marketing Program	Increase the number of BETC project from 72 – 103 over the three year period	ODOE	\$20,000 (funds .15FTE)	\$20,000 (funds .15FTE)

Program Impact:

Year	New BETC Projects Approved	Total Project Implementation Costs (submitted)	Annual VMT Reduction* (miles)	Total Gallons of Gas Saved**	Cost of Program	Cost per VMT reduced***
2002-03	45	\$2,700,000	59,000,000	3,000,000	\$100,000	N/A
2003-04	27	\$1,900,000	35,000,000	1,700,000	ODOE	N/A
2004-05	14	\$900,000	18,000,000	900,000	\$30,000****	N/A
2005-06	17	\$1,100,000	22,000,000	1,100,000	\$30,000***	N/A
2006-07	15	\$1,400,000	20,000,000	1,300,000	\$60,000	N/A
2007-08	16	\$1,600,000	20,000,000	1,200,000	\$60,000	N/A

*In 2002 59,000,000 VMT reduced x 60% increase in 2003. A 20% increase is assumed for the next three years. 68% of the projects approved are for transit passes. The remaining 32% includes telework, bicycles, commuter pool vehicles, incentives and TMA dues.

** Based on an average gas mileage of 20mpg

***The program itself does not reduce VMT but provides the incentive to businesses to reduce their VMT.

****Assumes Regional Travel Options Marketing program is actively marketing BETC

Regional Travel Options Evaluation Program

Three-Year Workplan

December 2003

GOAL: Refine performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

Program Summary:

The RTO evaluation program will improve how we collect, analyze and report data for each RTO program component. The annual evaluation report will be used to refine program development, marketing and implementation so that we can invest limited program dollars in the most cost effective ways.

Strategic Direction:

To achieve the greatest result with the limited RTO funding available, the RTO Subcommittee is pursuing development of measures of effectiveness of possible programs. These measures are based on both the techniques used in selecting employer-based programs and on preference survey methods. This proposed work will allow us to move beyond the measures for employer-based programs developed for ECO into a broader range of programs.

TriMet technical staff will continue to be responsible for ECO survey processing (paper or electronic at trimet.org). During the 2001-2003 fiscal years, technical staff produced 877 ECO employer reports, representing a total of 141,022 employees.

TriMet and Metro staff will work together on research design, fielding, analysis and report writing. Further, technical staff at Metro and TriMet are working with J. Richard Kuzmyak, Transportation Consultant¹, for the purpose of analyzing the cost-effectiveness of various TDM programs. It is anticipated that results from this work will help regional partners determine which program or "bundle of programs" promise the greatest return for dollars invested (ROI).

As part of the region's desire to work with university students, technical staff is identifying projects that would be particularly suited to urban planning and/or transportation planning students. It is thought that work studying RTO efforts in regional centers would be an ideal project for these students to pursue.

Strategy 1 Report annually on RTO program activities and impact.

Strategy 2 Survey all ECO affected employers in the next five years and increase the number of ECO employers that are in compliance with ECO Rules from 50% to 75%.

¹ Transportation Research Board Special Report 264, *The Congestion Mitigation and Air Quality Improvement Program, Assessing 10 Years of Experience - Appendix E: Cost- Effectiveness of Congestion Mitigation and Air Quality Strategies*, Kuzmyak, J.R., Page 275-419

Strategy 3 Evaluate all 38 Region 2040 Centers on an annual basis to determine progress towards non-SOV modal targets.

Strategy 4 Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.

Detailed Work Program

STRATEGY 1: REPORT ANNUALLY ON RTO PROGRAM ACTIVITIES	WHO IMPLEMENTS	BUDGET		
		'03-'04	'04-'05	'05-'06
Produce annual report	Metro with all regional partners	\$100,000	\$100,000	\$100,000
Subtotal		\$100,000	\$100,000	\$100,000
STRATEGY 2: ENHANCE ECO PROGRAM				
TriMet Technical Services		\$147,025	\$154,376	\$162,095
Develop Guidance Tool/Package (07/04 – 11/04)	Metro with all regional partners		\$38,400	
Develop training module for Guidance T/P (11/04 – 12/04)	Metro with all regional partners		\$7,200	
Run employer outreach (01/05 – 04/05)	TriMet Employer Program		\$4,800	
Deliver training to employers (02/05 – 06/05)	TriMet Employer Program		\$15,000	
Provide call-in support to employers (02/05 – 10/05)	TriMet Employer Program		\$2,000	\$1,000
Produce materials	TriMet Employer Program		\$5,500	\$2,000
Supervise work (07/04 – 10/05)	Metro/TDM Sub		\$4,500	\$1,500
Subtotal		\$147,025	\$227,281	\$166,595
STRATEGY 3: EVALUATE ALL 38 REGION 2040 CENTERS				
Work with regional partners to establish commute mode split targets for regional centers preparing for TMA development.	Metro with all regional partners	\$5,000	\$5,000	\$5,000
Identify land use measures that can be monitored and related to travel behavior data.	Metro with all regional partners	\$5,000	\$5,000	\$5,000
Develop and implement a targeted marketing effort for large non-participating employers in key regional centers.	TriMet Employer Outreach Program	see Employer Outreach Program Budget		

Subtotal		\$10,000	\$10,000	\$10,000
STRATEGY 4: DEVELOP A SET OF PREDICTION FACTORS				
Review literature for additional methods and practices (05/04 – 08/04)	Metro/TDM Sub	\$3,000		
Identify RTO programs that are candidates for Predictors (09/04 – 11/04)	Metro/TDM Sub		\$10,000	
Develop work statement for consultant on Predictors (12/04 – 02/05)	Metro/TDM Sub		\$6,000	
Issue RFP and select consultant (03/05 – 05/05)	Metro/TDM Sub		\$2,000	
Develop Predictor Set #1 (06/05 – 10/05)	Metro/TDM Sub Consultant		\$20,000	\$150,000
Evaluate process and identify additional RTO programs (11/05)	Metro/TDM Sub		\$5,000	\$5,000
Subtotal		\$3,000	\$43,000	\$155,000
Total		\$260,025	\$380,281	\$431,595

Appendix C

Past Program Expenditures

Region 2040 Initiatives Program

FY 2002-03		FY 2003-04	
City of Portland Travel Smart program	\$75,000	Lloyd district TMA transportation store	\$14,375
Nimbus shuttle	\$93,250	City of Portland Interstate Avenue corridor TDM marketing program	\$20,000
Marquam Hill partnership bicycle program	\$35,000	Swan Island TMA "Get on Board" program	\$25,000
Tualatin Shuttle	\$20,000	Westside Transportation Alliance "Car Free and Carefree Weeks" program	\$25,000
Cascadia Design	\$3,800	Lloyd district TMA flexcar and PASSport plus marketing program	\$16,000
Metro Assistance	\$75,000	Washington County bicycle map update	\$9,500
		Gresham TMA information and wayfinding system	\$8,125
		Metro Assistance	\$75,000
		Cascadia Design	\$3,000
Total	\$302,050	Total	\$196,000

Vanpool Program

FY 2002-03		FY 2003-04	
Sitel	15,420	Sitel	15,420
LSI	14,520	LSI	14,520
Sheraton	15,420	Sheraton**	15,420
Credence	14,520	Credence	14,520
Viking	15,420	Viking	15,420
OHSU	15,420	OHSU	15,420

Gunderson*	15,420		
CarpoolMatchNW	139,000	CarpoolmatchNW	116,000
Total	\$245,140	Total	\$206,720

*Gunderson recently discontinued their vanpool shuttle.

**Sheraton is in breach of contract and will likely lose their shuttle.