

 **Metro** | *Agenda*

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, May 13, 2016
Time: 1:00 p.m. to 3:00 p.m.
Place: Metro Regional Center, Council chamber

- | | | | |
|----------------|-----------|--|--|
| 1:00 PM | 1. | CALL TO ORDER AND DECLARATION OF A QUORUM | John Williams, Chair |
| 1:05 PM | 2. | COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS | John Williams, Chair |
| 1:10 PM | 3. | CITIZEN COMMUNICATIONS ON AGENDA ITEMS | |
| 1:15 PM | 4. | ** EVALUATION TOOL FOR 2019-2021 REGIONAL FLEXIBLE FUNDS STEP 1 AND 2 PROJECT PROPOSALS
Purpose: Discuss the evaluation tool through which the 2019-2021 Regional Flexible Funds Step 1 and 2 project proposals will be defined, evaluated and scored. Refine technical measures and scoring methodology. Information/Discussion | Dan Kaempff,
Ted Leybold, Metro |
| 3:00 PM | 5. | ADJOURN | John Williams, Chair |

Upcoming TPAC Meetings:

- Friday, May 27, 2016
- Friday, June 24, 2016
- Friday, July 29, 2016

- * Material will be emailed with meeting notice
- ** Material will be emailed at a later date after notice
- # Material will be distributed at the meeting.

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានក្បួនលក្ខណ៍រើសអើងសូមចូលទស្សនាការប្រកាស www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការការបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1890 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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2016 TPAC Work Program

As of 5/11/16

NOTE: Items in *italics* are tentative; **bold** denotes required items

<p><u>May 13, 2016 (Additional session #2)</u></p> <ul style="list-style-type: none"> • Evaluation tool for 2019-2021 Regional Flexible Funds Step 1 and 2 project proposals. <u>Information/Discussion</u> (Kaempff, Leybold) 	<p><u>May 27, 2016</u></p> <ul style="list-style-type: none"> • 2018 RTP Update: Report on Leadership Forum #1 and Next Steps <u>Information/Discussion</u> (Ellis, 25 mins) • DEI - Strategic Plan to Advance Racial Equity, Diversity and Inclusion <u>Information/Discussion</u> (Ocaña-Chú; 30 mins) • Portland Streetcar Update <u>Information/Discussion</u> (Dan Bower, 30 mins) • Coordinated Transportation Plan for the Elderly and People with Disabilities and 2018 RTP Update <u>Information/Discussion</u> (Hesse, Cho; 20 mins)
<p><u>June 24, 2016</u></p> <ul style="list-style-type: none"> • SW Corridor Environmental Review Package <u>Information/Discussion</u> (Wilkinson, 40 min) • Vehicle Electrification Project Options <u>Information/Discussion</u> (Leybold, Winter; 20 mins.) • 2018 RTP: Revenue Forecast Approach <u>Information/Discussion</u> (Leybold, Lobeck; 25 mins) • MAP-21 Rulemaking <u>Information/Discussion</u> (Kloster, Ellis; 20 mins) 	<p><u>July 29, 2016</u></p> <ul style="list-style-type: none"> • 2018 RTP: Transportation Equity Priority Outcomes <u>Information/Discussion</u> (Cho; 35 mins) • 2018 RTP: Regional Freight Needs <u>Information/Discussion</u> (Collins; 35 mins) • MAP-21 Rulemaking / Comment Letter <u>Recommendation to JPACT</u> (Kloster, Ellis; 30 mins)
<p><u>August 26, 2016</u></p> <ul style="list-style-type: none"> • 2018 RTP: Background for Regional Leadership Forum #2 <u>Information/Discussion</u> (Kim Ellis, 30 mins) • 2018 RTP: Revenue Forecast <u>Information/Discussion</u> (Leybold, Lobeck; 30 mins) • <i>2018 RTP: Draft Regional Transit Vision & Service Enhancement Plans Update <u>Information/Discussion</u> (Snook, Hesse, Lashbrook; 60 mins)</i> • Event: RTP Regional Leadership Forum #2 (September 23, 8:00a.m. - noon) Navigating Our Funding Landscape 	<p><u>September 30, 2016</u></p> <ul style="list-style-type: none"> • 2018-2021 MTIP and 2018 RTP Air Quality Conformity Consultation <u>Information/Discussion</u> (Cho, 15 mins) • 2018 RTP: Project Solicitation Approach <u>Information/Discussion</u> (Kim Ellis; 40 mins) • 2018 RTP: Performance Measures and Targets <u>Information/Discussion</u> (John Mermin; 40 mins) • <i>Highway Freight Bottlenecks <u>Information/Discussion</u> (ODOT, 40 mins)</i>

2016 TPAC Work Program

As of 5/11/16

*NOTE: Items in **italics** are tentative; **bold** denotes required items*

<p><u>October 28, 2016</u></p> <ul style="list-style-type: none"> • 2018 RTP Update: Background for Regional Leadership Forum #3 <u>Information/Discussion</u> (Kim Ellis, 30 mins) • 2018 RTP: Safety Strategies and Actions <u>Information/Discussion</u> (McTighe; 25 mins) • Regional Flexible Fund Allocation <u>Discussion</u> (Ted Leybold/Dan Kaempff, 55 mins) 	<p><u>November 18, 2016</u></p> <ul style="list-style-type: none"> • Regional Flexible Fund Allocation Recommendation to JPACT (Ted Leybold/Dan Kaempff, 45 mins) • 2018 RTP: Project Update <u>Information/Discussion</u> (Ellis, 30 mins) • Special Transportation Fund Allocation Process (Cho) • 2018 RTP: Performance Measures and Targets <u>Information/Discussion</u> (Mermin, Cho, McTighe; 40 mins) <p>Event: RTP Regional Leadership Forum #3 (December 2, 8:00 am to noon) Transforming Our Vision into Regional Priorities</p>
<p><u>December 16, 2016</u></p>	

Parking Lot

- TAP project delivery contingency fund pilot update (Leybold, Cho)



TRANSPORTATION POLICY ALTERNATIVES COMMITTEE
May 6, 2016
Metro Regional Center, Council Chamber

MEMBERS PRESENT

John Williams
Kelly Brooks
Katherine Kelly
Chris Deffebach
Karen Buehrig
Cora Potter
Heidi Guenin

AFFILIATION

Metro
ODOT
City of Gresham
Washington County
Clackamas County
Community Representative
Community Representative

MEMBERS EXCUSED

Charity Fain
Patricia Kepler
Adrian Esteban
Jared Franz
Joanna Valencia
Judith Gray
Nick Fortey
Dave Nordberg
Don Odermott
Lynda David
Nancy Kraushaar
Eric Hesse

AFFILIATION

Community Representative
Community Representative
Community Representative
Community Representative
Multnomah County
City of Portland
Federal Highway Administration
Oregon Department of Environmental Quality
City of Hillsboro, representing Cities of Washington County
Southwest Washington Regional Transportation Council
City of Wilsonville, representing Cities of Clackamas County
TriMet

ALTERNATES PRESENT

Phil Healy
Jessica Berry
Shoshana Cohen
Tom Mills

AFFILIATION

Port of Portland
Multnomah County
City of Portland
TriMet

STAFF: Ted Leybold, Dan Kaempff, Grace Cho, Lisa Hunrichs

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair John Williams declared a quorum and called the meeting to order at 9:05 a.m.

2. COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS

There were no comments.

3. CITIZEN COMMUNICATIONS ON AGENDA ITEMS.

There were no citizen communications.

4. EVALUATION TOOL FOR 2019-2021 REGIONAL FLEXIBLE FUNDS STEP 1 AND 2 PROJECT PROPOSALS

Mr. Ted Leybold and Mr. Dan Kaempff appeared before the committee to discuss the evaluation tool through which the 2019-2021 Regional Flexible Funds Step 1 and 2 project proposals will be defined, evaluated and scored, and to refine the technical measures and scoring methodology.

Mr. Leybold initiated the discussion by clarifying the process and timeline for moving forward.

Mr. Kaempff walked through the changes to the policy document since TPAC on April 29. He noted that language had been added to more fully capture the TriMet amendment and clarify how flexible funds would be used.

The committee focused the majority of its attention to the criteria for the selection process and the tools for measuring and ranking the criteria. After discussion, the committee determined that the weighted criteria tool would provide a better opportunity to select projects than a percentage based tool.

The committee agreed to continue discussion at the next special session on May 13.

- 5. ADJOURN** Chair Williams noted that the next special meeting would be held on May 13, and that the next regular TPAC session would be held on May 27, 2016. The meeting was adjourned at 12:05. p.m.

Respectfully submitted,



Lisa Hunrichs, Planning and Development

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF MAY 6, 2015

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1	Agenda	5/6/2016	5/6/16 TPAC Agenda	050616T-01
2	Work Program	5/5/2016	2016 TPAC Work Program	050616T-02
3	Memo	5/3/2016	From: Dan Kampff, Principal Transportation Planner To: TPAC and Interested Parties Re: DRAFT 2019-21 RFFA criteria proposals	050616T-03
4	Document	5/6/2016	2018-21 Metropolitan Transportation Improvement Program & 2019-21 Regional Flexible Funds Allocation Policy Report - DRAFT (Discussion Draft for 5/6/16 TPAC)	050616T-04
5	Handout	5/6/2016	Table 3: Regional bond commitment repayment schedule (millions)	050616T-05
6	Handout	5/6/2016	2019-21 Regional Freight Initiative Criteria (Option B Scored) Corrected	050616T-06



Discussion DRAFT for 5-13-16 TPAC

(Based on discussion from 4-21-16 JPACT meeting. Dollar amounts are illustrative only and should not be considered final.)

Regional Flexible Fund Allocation

Project nomination process for
allocation of 2019-21 funds

About Metro

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

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

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Tom Hughes

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Auditor

Brian Evans

About the Joint Policy Advisory Committee on Transportation (JPACT)

The Joint Policy Advisory Committee on Transportation is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs in this region. www.oregonmetro.gov/JPACT

JPACT Members

Craig Dirksen, Metro Council, JPACT Chair
Kathryn Harrington, Metro Council
Shirley Craddick, Metro Council
Paul Savas, Clackamas County
Diane McKeel, Multnomah County
Roy Rogers, Washington County
Steve Novick, City of Portland
Tim Knapp, City of Wilsonville
Shane Bemis, City of Gresham
Denny Doyle, City of Beaverton

Neil McFarlane, TriMet
Rian Windshiemer, ODOT
Nina DeConcini, DEQ
Kris Strickler, WSDOT
Bill Wyatt, Port of Portland
Jack Burkman, City of Vancouver
Jeanne Stewart, Clark County

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DRAFT

ABOUT THE REGIONAL FLEXIBLE FUND ALLOCATION

The Regional Flexible Fund Allocation is the regional process to identify which transportation projects and programs will receive regional flexible funds. Metro anticipates allocating approximately \$130.38 million of federal Surface Transportation Block Grant (STBG) and Congestion Mitigation/Air Quality (CMAQ), program funds.

Every three years the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council decide how to spend federal transportation money known locally as the Regional Flexible Funds. This process allocates money both to region-wide investments that make our communities more livable and give people choices in how they travel, and to individual projects planned and built by local transportation agencies. In this cycle, JPACT and the Metro Council decided that money for individual projects should be more coordinated and focused. In addition, the passage of a five-year federal transportation bill in 2015, the indication from the state that the 2017 Legislature will consider a new transportation funding bill, and consideration of a regional funding opportunity, led decision-makers to direct a portion of the flexible funds to be used to prepare a package of projects to address several of the region’s most urgent transportation needs.

To achieve this Metro has initiated the development of a collaborative process for project nomination and involved greater policy development early in the process to give specific direction on the types of projects that can be funded.

This document explains the policies and framework for the process and the project nomination guidelines.

2019-21 RFFA Project Proposal Evaluation Process & Timeline

<p><u>2016</u></p> <p>May 6, 9:00 a.m. – SPECIAL TPAC MEETING #1</p> <p>May 13, 1:00 p.m. – SPECIAL TPAC MEETING #2</p>	<p>TPAC will provide input to refine and prepare an evaluation tool through which Step 1 & 2 project proposals will be defined, evaluated and scored.</p> <p>The May 6 meeting focus will be a discussion of technical measures and scoring methodology.</p> <p>The May 13 meeting will be a review of draft application materials and process</p>
<p>June 9 – Application materials released</p> <p>June 28 – RFFA kick-off meeting</p> <p>August 12 – Proposals due</p>	<p>Jurisdictions will prepare project proposals and submit to Metro.</p> <p>Metro will host a kick-off meeting with local agency staff to describe the policy framework for the allocation process, review the data available to aid in project location and</p>

	definition, and to discuss the decision process.
September 13 – TECHNICAL REVIEW WORK GROUP MEETING September 30 – TPAC discussion	<p>Once the deadline for proposal submission has passed, applications will be distributed to work group members for their evaluation and scoring. They will have approximately four weeks to review and score the proposals.</p> <p>In their September 13 meeting, a TPAC work group will discuss project scores and forward a final list of scored projects to TPAC.</p> <p>TPAC will review and discuss the project list at their September 30 meeting.</p>
October 1-31	The list of projects and their technical evaluative scores will be put out for a 30-day public comment period.
November 9 – Materials sent to CCCs, COP November 17 – JPACT (moved from 11/24, if needed) November 17 – Priorities due November 18 – TPAC discussion	The list of projects, along with their technical scores and public comment, will be provided to the county coordinating committees and the City of Portland. Those entities will consider this input in their deliberations on indicating their priority projects.
December 15 – JPACT discussion December 16 – TPAC recommendation	A list of projects, including technical scores, public comment and indicated priority status (if applicable) will be forwarded to TPAC for their recommendation. The TPAC recommendation will be made available for a public comment opportunity prior to action by JPACT.
<u>2017</u> January 19 – JPACT Action January 26 – Council Action	Metro Council takes action on the JPACT recommended project list.

Summary of Transportation Spending

Regional flexible funds represent approximately X percent of the on-going state and federal transportation funds that come into the region annually. Additional state and federal revenues enter the region through one-time program allocations. These include the [DESCRIPTION OF LOCAL

FUNDING HERE]. Also, there are locally generated sources of revenue such as the employer tax and farebox for transit operations and local fees such as parking revenues, and local gas tax and vehicle registration fees.

Regional flexible funds receive a relatively high degree of attention and scrutiny, because unlike most sources of transportation revenue that are limited to specific purposes, regional flexible funds may be spent on a wide variety of transportation projects or programs.

2019-2021 Regional Flexible Fund Allocation

The amount of regional flexible funds available to be allocated is determined through the Congressional authorization and appropriation process. In 2015, Congress passed a five-year transportation bill, known as the Fixing America's Surface Transportation (FAST) Act. A forecast is made to estimate how much funding may be available for projects and programs for 2016-2018. The forecast utilizes an estimated increase of three percent annually to the 2009 funding level. The three percent escalation rate is based on the historical pattern of funding levels over the life of the past two authorization bills.

Approximately \$63.17million dollars is currently forecast to be available to the Portland metropolitan region during the years 2019-2021after meeting commitments for bond payments. Should actual funding levels from federal fiscal year 2014 forward differ from this or previous forecasts, adjustments to the project allocations may need to be made. Changes would be made through programming adjustments (delaying implementation of one or more projects selected to receive funds) or through a comprehensive allocation and project adjustment decision by JPACT and the Metro Council.

Type of funding available

Regional flexible funds come from two funding programs; Surface Transportation Block Grant Program (STBG) which now contains the Transportation Alternatives (TA) funding program, and Congestion Mitigation/Air Quality (CMAQ). Each program's funding comes with unique restrictions.

STBG funds may be used for virtually any transportation project or program except for construction of local streets. STBG grant funds represent approximately X percent of the funds available.

The TA funds are a sub-component of the STBG funds and as such, are partially sub-allocated to large MPOs. Eligible activities include biking, walking and Safe Routes to Schools projects and environmental mitigation as eligible activities. These funds represent approximately X percent of the funds available and must be distributed through a competitive allocation process. This competitive process will be conducted as part of the Step 2 Community Investment solicitation process.

CMAQ program funds cannot be used for construction of new lanes for automobile travel. Additionally, projects that use these funds must demonstrate that some improvement of air quality will result from building or operating the project or program. CMAQ grant funds represent approximately X percent of the funds available.

As in previous allocations, the region expects to select a variety of projects so that funding conditions may be met by assigning projects to appropriate funding sources after the selection of candidate projects. Applicants do not need to identify from which program they wish to receive funding.

Should actual federal allocations be less than the amount forecasted, changes to programming will be accommodated through programming adjustments (delaying implementation of one or more projects selected to receive funds) or through a comprehensive allocation and project adjustment by JPACT and the Metro Council.

Eligible applicants

Project nominations may be submitted on behalf of eligible sponsors located within the region's Metropolitan Planning Organization (MPO) boundary, including: Washington County and its cities, Clackamas County and its cities, Multnomah County and its eastern cities, and City of Portland, Oregon DEQ, TriMet, ODOT, Port of Portland and Parks and Recreation Districts.

Applicants must demonstrate the technical, administrative and budget capacity to manage a federally funded transportation project and to provide required local match. This will include the ability to execute an agreement with the Oregon Department of Transportation (ODOT) to govern the implementation of the project and the financial capacity to place local match funds on deposit and carry project costs until reimbursement of eligible expenses is approved. For more information on the requirements associated with managing a federal aid transportation project, review the Local Agency Guidelines manual on the ODOT website at:

<http://www.oregon.gov/ODOT/TD/AT/Pages/LAG.aspx>

Regional Flexible Fund Allocation information and RFFA packet, applications, costs estimate workbook, and data files can be downloaded from the Metro website:

<http://www.oregonmetro.gov/rffa>

POLICY FRAMEWORK

The following policies have been adopted for the 2019-21 allocation of regional flexible funds by Metro Resolution Nos. 12-4383 and 12-4401.

Recurring process and administrative policies

These policies define how the allocation process should be conducted and what outcomes are achieved with the overall allocation process.

1. Select projects from throughout the region, however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring air quality Transportation Control Measures for pedestrian and bicycle improvements are met and that an adequate pool of CMAQ eligible projects is available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage project applications that efficiently and cost effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an area's stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.
9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

Two step project nomination framework

This policy framework affirms the two-step allocation process, establishes project focus areas, and directs the development of a process for nominating projects for funding.

Step 1 is the process to affirm regional bonding commitment and set funding levels for region-wide programs. Step 2 is the process to allocate funds to locally generated Community Investment projects. Funding targets for Community Investment projects were set at \$25.81 million for Active Transportation & Complete Streets projects and \$7.34 million for Regional Freight Investments projects.

The following are the funding targets set for the two steps. Please note that proposed investments in both steps will be available for review and comment during the public comment phase of the process and the final allocation decision will be made in January 2017.

Step 1: Provide for existing region-wide programs - \$30.02 million

- Transit Oriented Development – \$9.87 million
- TSMO/ITS - \$5.24 million
- Regional Travel Options - \$9.29 million
- Regional Planning - \$3.96 million
- Corridor & Systems Planning - \$1.66 million

Step 2: Community Investment Fund Projects \$33.15 million

- *Active Transportation/Complete Streets target: 75%* - This project focus area prioritizes infrastructure support for non-auto trips and ensuring safe streets that are designed for all users.
- *Regional Freight Investments target: 25 %* - This project focus area supports the development of the region's economy through investment in green infrastructure and key freight projects or programs.
- *Collaborative Process* - Develop the project proposals for new focus areas through a collaborative process involving impacted stakeholders.

Active Transportation/Complete Streets projects

Construction project cost minimum

\$3 million total project cost or total sub-region target (less eligible project development nomination), whichever is less.

Project development cost minimum

\$200,000, but appropriate to project scope (PE phase will be more expensive than planning level work). Scope and budget must be reviewed for feasibility with Metro and ODOT staff prior to final nomination.

Final Number of project recommendations per sub-region

There is no limit to the number of applications that may be submitted on August 12, 2016. Enough applications must be submitted to meet the federal requirements of a conducting a competitive allocation process. County Coordinating committees and the Portland City Council will need to make a final recommendation that meets target and construction project cost minimums, and may nominate one project development phase. Project development may include anything from a planning level "alternatives analysis" to preliminary engineering.

Regional Freight Investments projects

Construction project cost minimum

\$1 million or total sub-region target, whichever is less.

Project development cost minimum

\$200,000 but appropriate to project scope (PE phase will be more expensive than planning level work). Scope and budget must be reviewed for feasibility with Metro and ODOT staff prior to final nomination.

Final Number of project recommendations per sub-region

There is no limit to the number of applications that may be submitted on August 12, 2016. Enough applications must be submitted to meet the federal requirements of a conducting a competitive allocation process. County Coordinating committees and the Portland City Council will need to make a final recommendation that meets target and construction project cost minimums, and may nominate one project development phase. Project development may include anything from a planning level "alternatives analysis" to preliminary engineering.

DATA AND INFORMATION

Kick-off meeting

Metro will host a kick-off meeting with local agency staff to describe the policy framework for the allocation process, review the data available to aid in project location and definition, and to discuss the project nomination guidelines and decision process. This workshop will take place June 28, 2016 at Metro Regional Center in Council Chambers.

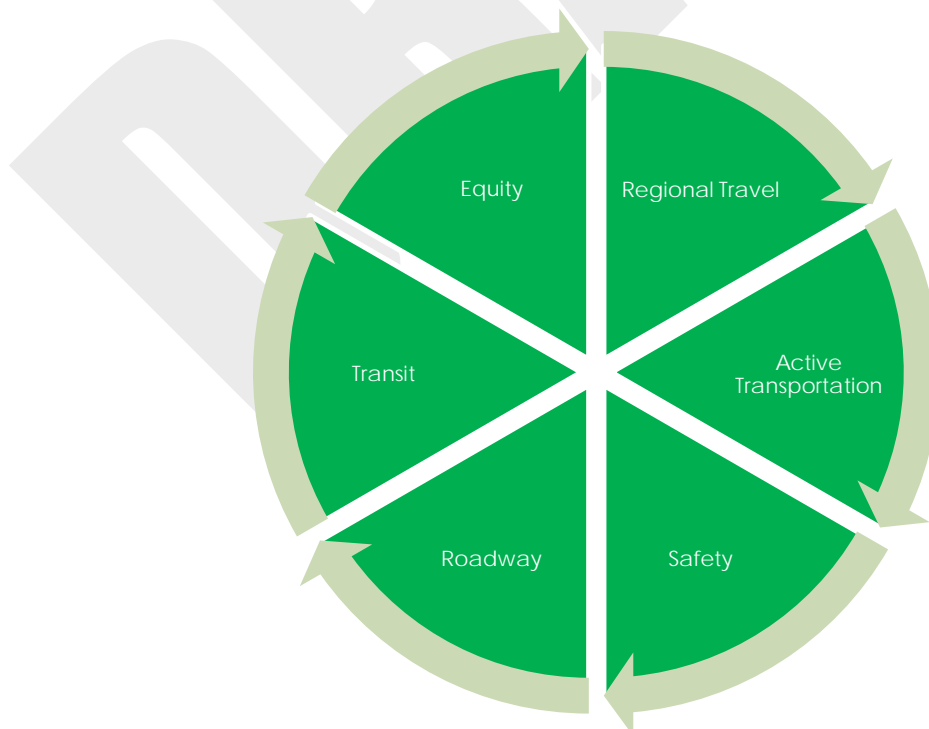
Local coordinating committees

Following the kick-off meeting, Metro will attend all of the local coordinating committees to begin the project nomination process. The discussions are intended to get the conversation started about potential project nominations.

Data Resource Guide for 2019-21 MTIP Project Development

Public agencies are responding to trends that place greater emphasis on capturing and using data to guide decisions and ensure accountability. The passage of Fixing America's Surface Transportation Act (FAST Act) in 2015 continued the federal commitment to a performance-driven, outcomes-based planning and decision-making framework that has direct effects on how the Portland region approaches its MTIP process.

This guide is organized into transportation categories shown in the graphic below. It provides one-stop access to high level transportation data and useful links to other data resources helpful to complete applications.



Regional Travel

- 3-County Population 1980-2010 (US Census)
- Percentage Change in 3 – County Population 1980-2010 (US Census)
- Average Daily VMT/Capita (TTI)
- Annual Transit Passenger Trips (TriMet)
- What is VMT/household – how has this changed from 1994 (Metro, Travel Survey)
- What is the average trip length – how has this changed from 1994 (Metro, Travel Survey)
- What is the number of trips per household (Metro, Travel Survey)
- What is the mode split for all trips by auto, carpool, transit, bike and walk (Metro, Travel Survey)
- What is the mode split for commute trips by auto, carpool, transit, bike and walk (Metro Travel Survey)

Transit

- Transit stop proximity to sidewalks (TriMet, Pedestrian Network Analysis)
- Transit stops with highest ridership (TriMet, Pedestrian Network Analysis)

Active Transportation

- Cycle zone analysis
- Pedestrian district composite
- Pedestrian corridor composite
- Sidewalk completion near schools

Safety

- Highest fatal and serious injuries for all modes on arterial streets 2007-2010
- Fatal and serious for pedestrian 2007-2010
- Fatal and serious for bicycle 2007 - 2010

Roadway

- Travel time reliability on freight network
- Congestion on freight network
- Incident response times

Equity

- Demographic composite map
- Essential services composite map
- Mobility composite map

Local data

The regional data available is intended to get the conversation started about where projects can be developed and defined to meet the criteria however, there may be local sources of data that can help “ground truth” the regional data and provide additional information for aiding the nomination process. We encourage the use of additional data in this process.

PROCESS FOR NOMINATING PROJECTS

The following describes the different project nomination process for the Step 2 Community Investment.

Step 2 Nomination Process

The following explains the process and timeline for nominating Step 2 projects:

1. Attend the Regional Kickoff meeting or local coordinating committee discussion – June 28, 2016
2. Access Regional Resource Guide data on Metro’s website for use in identifying project locations and project scopes that meet and address the criteria – June 9 – August 12, 2016
3. Lead agencies submit applications. - Application due August 12, 2016
4. Complete the project nomination narrative and cost estimate workbook for projects being put forth for consideration (narratives ask applicants to describe how their project addresses project prioritization criteria described in Appendix D):
 - Download the application form and cost estimate workbook separately - <http://www.oregonmetro.gov/rffa>
 - Follow nomination guidelines for construction cost minimums and project development cost minimums
 - Develop project shapefiles - use the guidelines in Appendix B.
 - Submit letter from lead agency policy body approving the project for nomination (due prior to beginning of public comment period)
 - Submit application materials to Dan Kaempff via email at: daniel.kaempff@oregonmetro.gov

PUBLIC COMMENT & DECISION PROCESS

Following the submittal of Step 2 project nomination narratives, the public will be able to provide comments on the relative priority of Step 2 projects and whether the any of the projects as defined meet community needs or need refinement. Lead agencies will be able to receive comments and make refinements to their projects prior to the allocation decision process. The following explains the timeline for public comments and the decision process:

1. JPACT to release project narratives for public comment period - May 2013.
2. Public comment period - May-June 2013 – regional web based comment tool.
3. Metro staff summary of public comments for use by lead agencies to make final project refinements - Available June 2013.
4. Lead agencies to provide explanation of refinements to project as a result of public comments (if applicable) - submit to Dan Kaempff via email at, daniel.kaempff@oregonmetro.gov.
5. Coordinating committees and City of Portland will identify narrowed list of Step 2 projects balanced to 100 percent of sub-regional target.
6. Coordinating committees and City of Portland conduct formal, publicly noticed local hearing for input on 100 percent list of Step 2 projects.
7. Coordinating committees and City of Portland will adopt a 100% list recommendation at a meeting with an agenda item indicating this is an action item.
8. Metro staff to develop conditions of project approval.
9. TPAC consideration of projects and conditions of funding approval - August 2013.
10. JPACT action on regional flexible fund allocation - September 2013.
11. Metro Council action on regional flexible fund allocation - September 2013

APPENDIX A

Applicants shall provide Metro with documentation as part of the project nomination submitted demonstrates that the identification of this project in a planning process:

1. Used appropriate demographic data to develop a demographic profile of the area affected or served by the proposed project or program.
2. Sought public comment in the planning of the project.
3. Made a concerted effort to reach all segments of the population, including people from minority and low-income communities, and organizations representing these groups and other protected classes and made efforts to remove barriers to participation to allow for all segments of the population to participate in the planning process.

Minimum requirements for local public process prior to the identification of local priority projects for the December 2016 JPACT action. County Coordinating committees and City of Portland staff shall provide Metro with documentation as part of the final recommendation submitted that:

- Sub-regional county coordinating committees and Portland to held at least one public meeting on projects that could be nominated. This should extend beyond a public hearing at a regular County Coordinating meeting and should take place in July or August 2013.
- All sub-regions are to document public outreach events, how they notified the public and stakeholder groups about the meeting.
- Made a concerted effort to reach all segments of the population, including people from minority and low-income communities, and organizations representing these groups and other protected classes to provide input on the nominated projects. Contact information for those groups should be forwarded to Metro. Made efforts to remove barriers to participation (i.e. provided translation for limited English proficiency participants, held meetings at locations accessible to people with disabilities and near public transportation) to allow for all segments of the population to participate in the planning process.
- All Sub-regions to document the comments received at public meeting(s) and other times during the nomination process.
- Demonstrated how substantive public comments may have influenced or shaped the nomination list of projects.
- Sub-regions to use outreach methods they determine to be appropriate and successful within their communities to publicize the meeting(s) and gather input.
- A technical analysis of the nominated projects to the category criteria shall be completed. It should reference the materials used from the Resource Guide and it should be made available and shared with the:
 - Public in time for the public comment period

- Policy committee prior to their recommendation of projects to JPACT.
- JPACT and the Metro Council.

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APPENDIX B

GIS shapefile guidelines

All applicants must submit project information in shapefile format, clearly identified using the project name, and conform to the following specifications:

A. Linear projects: Projects on roads, sidewalks, or other continuous paths associated with roadways should consist of RLIS street segments. Please use the most current RLIS street centerline file, select the links that make-up the project and export the shapefile titled with the project name.

B. Point projects: Projects that are in discreet locations (intersection improvements, signal timing, etc.) should be created as a “point shapefile” and snapped to the nearest intersection.

C. Area projects: Transportation projects that do not conform to lines or points can be represented with a polygon. These include region-wide projects, or projects that are programmatic in nature. In these cases please submit a polygon of the project extent.

If more than one project is contained within a shapefile, please provide the project name for each object in the attribute table.

All project submittals should use the following coordinate system:

Projected Coordinate System*:

- NAD_1983_HARN_StatePlane_Oregon_North_FIPS_3601
- Projection: Lambert_Conformal_Conic
- False_Easting: 8202099.73753281
- False_Northing: 0.00000000
- Central_Meridian: -120.50000000
- Standard_Parallel_1: 44.33333333
- Standard_Parallel_2: 46.00000000
- Latitude_Of_Origin: 43.66666667
- Linear Unit: Foot
- Geographic Coordinate System: GCS_North_American_1983_HARN
- Datum: D_North_American_1983_HARN
- Prime Meridian: Greenwich
- Angular Unit: Degree

All data files are available for download from the Metro FTP site:

<ftp://ftp.oregonmetro.gov/dist/tran/rffa> *

*If you have any questions about the requirements or need any help with this process, please call Matthew Hampton, 503-797-1748, or email matthew.hampton@oregonmetro.gov

APPENDIX C

Design elements of Active Transportation Projects that improve user experience:

- Provides “green” elements (trees/landscaping for on-street routes, off-street trail with views of water/access to nature)
- Provides buffer from noise if needed
- Avoids steep terrain if possible
- Minimizes interaction with traffic (refuge islands, high visibility crosswalks and signals, utilize lower traffic streets if possible or provide physical buffer along high-traffic streets)
- Provides the most direct route possible (avoids unnecessary meandering)
- Provides bicycle storage facilities at transit stops
- Provides way-finding and signage

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APPENDIX D

Criteria for Prioritizing Regional Flexible Fund Projects

Active Transportation & Complete Streets

Criteria to guide scope development and for identifying priority locations for projects

Data will be provided to nominating agencies that exemplify the criteria. This information will be made available and discussed at the June 28 workshop to aid in the identification of locations that best address the project selection criteria listed below.

Once priority locations have been selected based on the criteria, the following criteria should be used to help define specific projects details and prioritize competing project applications.

Relative Priority	Criteria
Highest	Project serves communities that have higher than average low-income, low-English proficiency, non-white, elderly and young populations
	Utilizes current plans and data to demonstrate improvements to safety: <ul style="list-style-type: none"> • in identified high-crash areas • by removing conflicts with freight and other vehicles
	Improves access to and from priority destinations: <ul style="list-style-type: none"> • Mixed-use centers • Large employment areas (by # of jobs) • Essential services for EJ/underserved communities • Schools
	Serves high density or projected high growth areas
Higher	Project completes a gap or improves a deficiency in the regional Active Transportation network
	Increase in use/ridership by providing a good user experience (refer to Active Transportation design criteria)
	Completes the “last mile” connection between transit and employment sites/areas
Priority	Includes outreach/education/engagement component
	Can leverage (or prepare projects for) new or competitive funds
	Reduces need for highway expansion

Regional Freight Investments

Criteria to guide scope development and for identifying priority locations for projects

Data will be provided to nominating agencies that exemplify the criteria. This information will be made available and discussed at the June 28 workshop to aid in the identification of where a project increases freight access to:

- Industrial lands
- Employment centers & local businesses
- Rail facilities for regional shippers

Criteria for scoping and prioritization of projects

Relative priority	Criteria
Highest	Can leverage (or prepare projects for) new or competitive funds
	Reduces freight vehicle delay
	Project increases freight access to: <ul style="list-style-type: none"> • Industrial lands • Employment centers & local businesses • Rail facilities for regional shippers
	Projects that help green the economy and offer economic opportunities for EJ/underserved communities ¹
Higher	Improves safety by removing conflicts with active transportation or other modes, and/or provides adequate mitigation for any potential conflicts
	Reduces air toxics or particulate matter
	Reduces impacts to EJ communities (e.g., reduced noise, land use conflict, emissions)
	Increases freight reliability
Priority	May not get funding otherwise
	Reduces need for highway expansion
	Addresses issues and improves connectivity among multiple freight modes

¹ Greening the economy means creating a low-carbon, resource-efficient and socially inclusive economy.



Active Transportation & Complete Streets Projects

Name of Project

(project name will be adjusted to comply with ODOT naming convention if necessary)

Project nomination narrative

Project nomination narratives provide in depth process, location and project definition details and serves as the nomination form for project funding consideration. **Project narratives should be kept to 12 pages total per project.** The narrative form is available electronically at: <http://www.oregonmetro.gov/rffa>.

Please complete the following:

Project Definition

Base project information

1. Corresponding RTP project number(s) for the nominated project.
2. Project extent or area description.
3. Purpose and need statement (The purpose and need statement should address the criteria as they apply to the project, for example: increase non-auto trip access to essential services in the X town center, particularly for the high concentration of Y and Z populations in the project area).
4. Description of project design elements.
5. Description of post implementation measurement of project effectiveness (Metro staff is available to help design measurement methodologies for post-construction project criteria performance).

Map of project area

1. Provide a map of the project consistent with instruction in Exhibit B

Project sponsor agency

1. Contact information for:
 - Application lead staff
 - Project Manager (or assigning manager)
 - Project Engineer (or assigning manager)

2. Describe how the project cost estimate was determined, and provide details on project readiness and ability for project funding to be obligated within the 2019-21 timeframe.

3. Describe whether the lead agency has recently led or failed to deliver a federal aid transportation project, and how the agency currently has the technical, administrative and budget capacity to deliver the project.

Location

1. Describe how you identified the travel corridor/area for the project and how regional and local data relevant to the project criteria support this location as your top priority(s). (See Appendix D of the Nomination Packet for criteria relevant to prioritizing project location)

Highest priority criteria

6. Does the project serve a traditionally underserved (minority, low-income, limited English speaking, youth, elderly, disabled) community? Explain how your project responds to data identifying concentrations of underserved communities and what project elements address the identified transportation needs of these communities. (See Transportation Equity maps/data on Metro FTP site for help identifying concentrations of EJ and underserved communities and how well they are served/not served).
7. Identify the safety issues in the project area. How does the project design remove conflicts with freight and other vehicles in the area? (insert data sources here).
8. Describe how the project improves access to priority destinations mixed-use centers, large employment areas, schools, and essential services for EJ/underserved communities. (See maps/data on Metro FTP site).
9. Does the project serve a high density or projected high growth area? Please explain. (For high growth areas, explain how the project is coordinated with growth plans to focus or orient future development to maximize use of the project).

Higher priority criteria

1. Describe the gap or deficiency in the Regional Active Transportation network this project is addressing. What barriers will be eliminated or mitigated?
2. Describe how the project will lead to an increase in non-auto trips through improvements in the user experience, following Active Transportation Plan design guidance or other relevant guidance such as NACTO. (See Appendix C for design elements that improve the user experience).
3. Does the project design include “last mile” connections? Please explain. (Last mile connections create safe and comfortable biking and walking routes that directly connect transit stops to nearby employment areas, and can include the provision of secure and convenient bicycle parking at stations).

Priority criteria

1. Please describe the outreach/education/engagement element of the project nomination. Is there an identified strategy and commitment to public education and encouragement to ensure maximum utilization of the project? Please describe. (Metro Regional Travel Options staff is available to help design an effective and appropriate level of education and marketing for your project nomination).
2. How will this project leverage other existing or competitive funds or investments? Describe any opportunities you have identified and how you plan to coordinate with other project(s) or leverage other funds.
3. Describe how the project may help reduce the need for road and highway expansion. Explain how it provides a new or improved alternative means of travel in a heavily congested corridor.

Process

1. Describe the planning process that led to the identification of this project and the process used to identify the project to be put forward for funding consideration. (Answer should demonstrate that the process met minimum public involvement requirements for project applications per Appendix A)
2. Describe how you coordinated with regional or other transportation agencies (e.g. Transit, Port, ODOT, Metro, Freight Rail operators, ODOT Region 1, Regional Safety Workgroup, and Utilities if critical to use of right-of-way) and how it impacted the project location and design.



Regional Freight Investments Projects

Name of Project

(project name will be adjusted to comply with ODOT naming convention if necessary)

Project nomination narrative

Project nomination narratives provide in depth process, location and project definition details and serves as the nomination form for project funding consideration. **Project narratives should be kept to 12 pages total per project.** The narrative form is available electronically at: <http://www.oregonmetro.gov/rffa>.

Please complete the following:

Project Definition

Base project information

1. Corresponding RTP project number(s) for the nominated project.
2. Project extent or area description.
3. Purpose and need statement (The purpose and need statement should address the criteria as they apply to the project, for example: increase non-auto trip access to essential services in the X town center, particularly for the high concentration of Y and Z populations in the project area).
4. Description of project design elements.
5. Description of post implementation measurement of project effectiveness (Metro staff is available to help design measurement methodologies for post-construction project criteria performance).

Map of project area

1. Provide a map of the project consistent with instruction in Exhibit B

Project sponsor agency

1. Contact information for:
 - Application lead staff
 - Project Manager (or assigning manager)
 - Project Engineer (or assigning manager)
6. Describe how the project cost estimate was determined, and provide details on project readiness and ability for project funding to be obligated within the 2019-21 timeframe.

7. Describe whether the lead agency has recently led or failed to deliver a federal aid transportation project, and how the agency currently has the technical, administrative and budget capacity to deliver the project.

Location

1. Describe how you identified the travel corridor/area for the project and how regional and local data relevant to the project criteria support this location as your top priority(s). (See Appendix D of the Nomination Packet for criteria relevant to prioritizing project location)

Highest priority criteria

8. Will this nomination leverage other funds or prepare a project to compete for discretionary funding that may otherwise not come to the region? Describe any opportunities you have identified
9. Describe how the project will reduce freight delay.
10. Describe how the project increases freight access to industrial lands, employment centers & local businesses, and/or rail facilities for regional shippers.
11. Describe how the project contributes to “greening the economy” and how the project helps expand economic opportunities to Environmental Justice/underserved communities. (For the purposes of this allocation we are defining “greening the economy” to be initiatives that contribute to creating a low carbon, resource efficient, and socially inclusive economy)

Higher priority criteria

1. Describe any conflicts with freight/active transportation you’ve identified in your project area. How does the project design mitigate these conflicts and improve safety?
2. Does the project help reduce air toxics or particulate matter? Please explain.
3. Does the project help reduce impacts, such as noise, land use conflicts, emissions, etc. to Environmental Justice communities? Please explain
4. Describe how the project increases freight reliability.

Priority criteria

1. Is the project of an innovative or unique nature such that it is not eligible or typically funded with large, traditional transportation funding sources such as state trust fund pass through to local agencies, local bridge program, or large state funding programs (Modernization, Bridge, Preservation, etc.) or have any other significant sources of funds? Please explain.
2. Describe how the project may help reduce the need for highway expansion
3. Describe any multi-modal elements included in the design of your project.

Process

1. Describe the planning process that led to the identification of this project and the process used to identify the project to be put forward for funding consideration. (Answer should demonstrate that the process met minimum public involvement requirements for project applications per Appendix A)
2. Describe how you coordinated with regional or other transportation agencies (e.g. Transit, Port, ODOT, Metro, Freight Rail operators, ODOT Region 1, Regional Safety Workgroup, and Utilities if critical to use of right-of-way) and how it impacted the project location and design.

DRAFT



DRAFT with TriMet amendment + criteria for 5.19.16 JPACT

**2018-21 Metropolitan
Transportation Improvement
Program & 2019-21 Regional
Flexible Funds Allocation
Policy Report**

Adoption draft – May 2016

About Metro

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

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

Stay in touch with news, stories and things to do.

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Auditor

Brian Evans

EXECUTIVE SUMMARY

As the Portland region prepares to make another round of transportation funding decisions, it has been presented with major opportunities to make significant investments to improve conditions for all users. With Congress' passage of the Fixing America's Surface Transportation (FAST) Act in late 2015, the region has at its disposal new federal programs as well as a five-year funding commitment. In addition, the Governor and state legislature have indicated that a new transportation funding bill will be considered in the 2017 session. And, encouraged by successful efforts in other parts of the country, regional leaders are considering the possibility of asking voters to approve a local funding measure as well.

Given these opportunities, the discussions leading up to adoption of this regional funding policy direction have centered on how the flexible funds can be used in a manner that puts the region in a strong position to compete for and leverage these additional sources of revenue. The choices laid out in this policy document collectively represent a way the region can develop multi-modal projects that will address some of the major system bottlenecks, follow through on the region's commitment to reduce greenhouse gas emissions, continue developing the transit network, improve safety for users of all ages, and provide more travel choices to the public.

In order to take advantage of these opportunities, it is important for regional decision-makers to think strategically about how best to invest our flexible funds. Building on the region's past history of successfully working in partnership to bond these funds to generate significant up-front funding for transit system development, there is also the opportunity to consider a similar approach to do development work on a package of major projects in order to have a pipeline of specific projects that are ready to leverage these new funding opportunities. And, this can be done while continuing the region's commitment to building a multi-modal transportation system that benefits everyone.

1.0 INTRODUCTION

The Metropolitan Transportation Improvement Program (MTIP) serves as the federally required schedule of transportation investments administered by Metro, ODOT, TriMet and SMART. The MTIP also monitors implementation of federal and regional policies for the Portland metropolitan region during a four-year cycle.

The MTIP is comprised of three major components: the transportation funding allocations administered by the state department of transportation (ODOT), transit agencies (SMART and TriMet), and the metropolitan planning organization (Metro). Additionally, the MTIP also includes state and local transportation programming which affects the regional transportation system. Metro's transportation funding process is known as the Regional Flexible Funds Allocation (RFFA). As the region prepares to prioritize transportation projects and program activities to receive regional flexible funds available in the federal fiscal years 2019 through 2021, this report provides the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council's policy direction for the allocation of the regional flexible funds and the coordination activities to develop the MTIP.

The process for updating these policies began by engaging regional stakeholders, technical advisory committees, elected officials, and Metro Council members. Metro staff used the TPAC and JPACT meetings as well as supplementary policy workshops to discuss and define: 1) expected coordination activities between the MPO, state department of transportation, and transit partners on the funding allocation processes; and 2) provide policy direction to allocate the estimated **\$130.38 million**¹ available in regional flexible funds for federal fiscal years 2019-2021.

The approach to allocating regional flexible funds proposed in this report is intended to develop a collaborative method for supporting transportation investments that achieve the region's vision and goals for the transportation system, as defined by the Regional Transportation Plan. The Plan's vision and goals include reducing the region's greenhouse gas emissions, keeping neighborhoods safe, supporting sustainable economic growth, and making the most of the existing investments our region has already made in public infrastructure.

2.0 REGIONAL SIX DESIRED OUTCOMES

In 2008, Metro Council and MPAC adopted Six Desired Outcomes² to form the framework of a performance-based approach for policy and investment decisions. Those outcomes are:

- **Vibrant communities:** People live and work in vibrant communities where they can choose to walk for pleasure and to meet their everyday needs.
- **Economic prosperity:** Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
- **Safe and reliable transportation:** People have safe and reliable transportation choices that enhance their quality of life.
- **Leadership on climate change:** The region is a leader in minimizing contributions to global warming.
- **Clean air and water:** Current and future generations enjoy clean air, clean water and healthy ecosystems.
- **Equity:** Equity exists relative to the benefits and burdens of growth and change to the region's communities.

The Six Desired Outcomes shape the way in which all regional plans and policies reflect and orient towards achieving the desired outcomes.

3.0 REGIONAL TRANSPORTATION SYSTEM PERFORMANCE TARGETS

In 2014, the region adopted the Regional Transportation Plan (RTP), which serves as the blueprint for the transportation system for the next 25 years. The RTP includes policies for

¹ Funding availability estimates subject to final confirmation from ODOT.

² Metro Resolution 08-3940

the development of the transportation system and the list of transportation priority investments to implement the blueprint. The Six Desired Outcomes are incorporated as part of the RTP vision and blueprint and as a result they shaped and guided the development of RTP performance targets to measure progress towards the goals. The ten performance targets are shown below in Table 1.

Table 1: 2014 Regional Transportation Plan Performance Targets

Economy	Safety – By 2040, reduce the number of fatal and severe injury crashes for pedestrians, bicyclists, and motor vehicle occupants each by 50% compared to 2007 - 2011 average.
	Congestion – By 2040, reduce vehicle hours of delay (VHD) per person by 10 percent compared to 2010.
	Freight reliability – By 2040, reduce vehicle hours of delay per truck trip by 10 percent compared to 2010.
Environment	Climate change – By 2040, reduce transportation-related greenhouse gas emissions per capita below 2010 levels.
	Active transportation – By 2040, triple walking, biking and transit mode shares compared to 2010 modeled mode shares.
	Basic infrastructure – By 2040, increase by 50% the miles of sidewalk, bikeways, and trails compared to the regional networks in 2010.
	Clean air – By 2040, ensure zero percent population exposure to at-risk levels of air pollution.
	Travel – By 2040, reduce vehicle miles traveled per person by 10 percent compared to 2010.
Equity	Affordability – By 2040, reduce the average household combined cost of housing and transportation by 25 percent compared to 2010.
	Access to daily needs – By 2040, increase by 50 percent the number of essential destinations accessible within 30 minutes by bicycling and public transit for low-income, minority, senior and disabled populations compared to 2005. ³

4.0 REGIONAL TRANSPORTATION FINANCE APPROACH

In May 2009, JPACT developed an approach to direct how the transportation needs of the region are to be addressed by existing or potential funding sources. The funding source approach to address the region’s transportation needs was updated by staff for the 2018-21 policy report to reflect administrative or process changes to certain sources (i.e. consolidation of certain federal fund sources under federal transportation funding reauthorizations (MAP-21 and FAST acts), restructuring of ODOT allocation programs). This

³ Added with adoption of the 2014 RTP.

approach is shown in Table 2 and provides a starting point for the various funding programs or sources that are addressed in the MTIP and State Transportation Improvement Program (STIP). The approach identifies funding mechanisms agencies use and a regional strategy for sources to be pursued to address unmet needs of the different elements of transportation system in the region. The approach has been utilized in the development of RFFA policies since the 2010-2013 cycle.

Table 2: Existing Regional Transportation Finance Approach (updated to reflect changes in federal, state, and regional policy)

Transportation Project/ Activity Type	Existing Funding Sources	Strategy for Sources of Additional Funding
Local/Arterial street reconstruction/maintenance	<ul style="list-style-type: none"> • State pass through • Street utility fees 	<ul style="list-style-type: none"> • Increases in state gas tax or VRF • New street utility fees or equivalent
Active Transportation (includes bicycle, pedestrian, and small on-street transit capital improvements like bus shelters)	<ul style="list-style-type: none"> • Regional Flexible Funds • Connect Oregon • ODOT Region 1 competitive allocation – dedicated • Local contributions • Development (Frontage, Impact Fees, SDC’s) 	<ul style="list-style-type: none"> • New federal program • State Urban Trail fund • New local funds
Highway preservation	<ul style="list-style-type: none"> • Interstate Maintenance • State gas & weight/mile tax • ODOT Region 1 preservation, maintenance, and operations allocation program • NHPP 	<ul style="list-style-type: none"> • Increases in state gas tax or VRF • New street utility fees or equivalent
Transit Operations	<ul style="list-style-type: none"> • Employer tax • Passenger fares • Section 5307 • Section 5310 	<ul style="list-style-type: none"> • Employer tax rate • New funding mechanism • Passenger fare increases
Arterial Expansion	<ul style="list-style-type: none"> • Development (Frontage, Impact Fees, SDC’s) • Urban Renewal • ODOT Region 1 competitive allocation program • Regional Flexible Funds⁴ • TIGER • Local contributions 	<ul style="list-style-type: none"> • SDC rate increases • Regionally raised revenue • Increase in state gas tax or VRF

⁴ Limited to arterial freight facilities for ITS, small capital projects, and project development.

Transportation Project/ Activity Type	Existing Funding Sources	Strategy for Sources of Additional Funding
Highway expansion	<ul style="list-style-type: none"> • ODOT Region 1 competitive allocation program • NHPP • National Freight Program • Modernization Program • Fed/state earmarks 	<ul style="list-style-type: none"> • More from existing sources • Pricing/tolling • Increase in state gas tax or equivalent • Regionally raised revenue
HCT expansion	<ul style="list-style-type: none"> • Federal New Starts • Federal Small Starts • State lottery • Regional Flexible Funds • TriMet General Fund • Local contributions 	<ul style="list-style-type: none"> • More from existing sources
TSMO/Travel Options	<ul style="list-style-type: none"> • State operations • Regional Flexible Funds • TIGER 	<ul style="list-style-type: none"> • Regional VRF or equivalent
Land Use – TOD	<ul style="list-style-type: none"> • Regional Flexible Funds 	<ul style="list-style-type: none"> • Strategy under development

5.0 2018-2021 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM COORDINATION POLICY

Federal policy language in the United States Code (USC) of Federal Regulations⁵ direct metropolitan planning organizations (MPOs), state departments of transportation (DOT), and transit agencies to work in cooperation with each other when using federal transportation funding to make investments in the region. These rules state:

“For each metropolitan area in the State, the STIP shall be developed in cooperation with the MPO designated for the metropolitan area. Each metropolitan transportation improvement program (TIP) shall be included without change in the STIP, directly or by reference, after approval of the TIP by the MPO and the Governor.”⁶

And,

“The MPO, in cooperation with the State(s) and any affected public transportation operator(s), shall develop a TIP for the metropolitan planning area.”⁷

⁵ Title 23 Highways, Chapter I Federal Highway Administration, Department of Transportation, Part 450 Planning Assistance and Standards.

⁶ §450.216 Development and content of the statewide transportation improvement program (STIP).

⁷ §450.324 Development and content of the transportation improvement program (TIP).

These rules, commonly referred to as the “Three C’s” (comprehensive, cooperative, and continuing) are intended to ensure required federal transportation planning and funding processes support shared local and federal goals. The “Three C’s” serve an important role because in each metropolitan region there is usually more than one entity which plans for the transportation network and has discretion over the allocation of federal transportation funding. For the Portland metropolitan region, the MTIP, as a federally required document, must be developed collaboratively with partners. Key partners of Metro involved with the development of the MTIP include ODOT, as the state department of transportation, TriMet and SMART as the region’s two transit operators. The MTIP has two main functions: 1) to serve as a tool to implement regional policies and ultimately federal policies addressing the federal planning factors; and 2) to demonstrate transportation investments comply with federal directives.

Therefore, in order to monitor and ensure the MTIP is implementing adopted regional policies across all federal transportation investments and meeting federal mandates, the entities which allocate federal transportation funding come to agreement on coordination activities to ensure the MTIP functions are being met. The agreement becomes the MTIP coordination policy and its development is facilitated by Metro, as the MPO. The policy is updated at the beginning of each new MTIP cycle.

As Metro prepares for the 2018-2021 MTIP cycle, a set of process and coordination activities have been identified at the outset to ensure cooperation between partners in developing the MTIP. Many of these policies have been developed over multiple cycles and continue to be modified or expanded to reflect changes in federal regulations and guidance.

The following section further describes the 2018-2021 MTIP coordination policy, which is categorized under regional policy implementation and federal administrative compliance.

Regional policy implementation

One of the main purposes of the MTIP is to implement adopted regional policies outlined in the Regional Transportation Plan (RTP). The RTP, as the blueprint for the region’s long-range transportation vision of the future, is required to embody federal planning requirements. As a tool to implement regional transportation policies, the MTIP includes: 1) a detailed list of transportation investments to be made in the next four years; and 2) narratives by Metro, ODOT, TriMet and SMART which demonstrate how the transportation investments make progress towards regional policies and comply with federal mandates.

For the 2018-2021 MTIP coordination policy, Metro, ODOT, TriMet and SMART are conducting four funding allocation decision processes. These processes are the main focus of identifying how transportation investments are implementing regional policies. At the early stages of 2018-2021 MTIP process, Metro hosted a set of policy workshops with ODOT, TriMet, and SMART as well as local partners and interested stakeholders to gather input on activities and ways in which the entities can be better coordinated. Based on the feedback and input, a set of general coordination activities and protocols have been developed as a means for each process to provide opportunities for decision-makers,

particularly JPACT and the Metro Council, to check in on the processes and weigh in on behalf of the region's transportation priorities.

Demonstration of federal compliance

Another key function of the MTIP is to demonstrate to federal oversight agencies that the regions' program of transportation investments is in compliance with applicable regulations and guidance. Therefore, as part of the development of each new MTIP, sections are devoted to describing how the funding allocation decision-making process and the overall package of transportation investments in the MTIP are compliant with federal regulations. Several of the federal regulations are specifically directed for the MTIP to address, while others are overarching federal compliance mandates across all federal programs. The follow list identifies the topic areas in which the MTIP documents federal compliance.

- Financial constraint of the funding decisions and overall package of investments
- Consideration of the following in funding decisions:
 - Congestion management process and strategies
 - Adequately operating and maintaining the transportation system
 - Transportation access and mobility needs of underserved communities
 - Implementation of air quality transportation control measures
- Environmental justice benefits and burdens of investments
- Title VI of the Civil Rights Act of 1964
- Air quality emissions impacts
- The process and technical considerations used to prioritize and make investment decisions
- The public involvement process to support the investment decision making, In particular identify the opportunities for meaningful public involvement to underserved communities
- How investments advance RTP implementation

2018-2021 MTIP coordination policy implementation

The implementation of the MTIP coordination policy and the specific details of coordination activities are documented and agreed upon by Metro, ODOT, TriMet, and SMART in the 2018-2021 MTIP charter. The 2018-2021 MTIP charter outlines the funding allocation process schedules, the specific coordination activities which will be conducted, and states the roles and expectations of each partner in the developing the 2018-2021 MTIP document and participation in funding allocation processes. The 2018-2021 MTIP charter was signed and placed into effect in January 2016 to allow partners to move forward with implementing coordination activities as the funding allocation processes are underway.

The charter is identified in the federally required planning agreement between Metro, ODOT, TriMet and SMART as a tool to identify specific coordination activities on large planning activities such as the development of an MTIP. The planning agreement outlines the overall roles and responsibilities of the four agencies in carrying out the federal transportation planning program and the 2018-21 MTIP charter has been developed consistent with the planning agreement.

6.0 REGIONAL FLEXIBLE FUND ALLOCATION OBJECTIVES

The following objectives define how the RFFA process should be conducted and what outcomes should be achieved with the overall allocation process.

1. Select projects from throughout the region; however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring air quality Transportation Control Measures (TCMs) for pedestrian and bicycle improvements are met and that an adequate pool of CMAQ-eligible projects is available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage the application of projects that efficiently and cost-effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an areas stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.
9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

7.0 2019-2021 REGIONAL FLEXIBLE FUNDS STRUCTURE

There is a projected total of **\$130.38 million**⁸ available for investments and projects in the 2019-2021 timeframe. Funding is allocated in two steps, described below.

NEW POLICY DIRECTION

Through a series of workshops conducted at the outset of the 2019-21 RFFA policy update process, several options for investment of flexible funds were identified. These options are reflective of new regional policy adopted since the prior flexible funds policy update as well as regionally identified issues. In order for the region to consider additional investments in Steps 1 and 2, JPACT directs staff and project sponsors to develop specific funding proposals

⁸ Funding availability estimates subject to final confirmation from ODOT.

to further define these policy options. Funding proposals will be considered and evaluated during the technical evaluation phase to be conducted during the summer and fall of 2016. These optional new investments are described below as New Policy Direction #s 1-5.

If Steps 1 & 2 funding levels from the 2016-18 RFFA cycle are continued at the same amounts (inflation adjusted), the remaining funding capacity in 2019-21 after meeting previous commitments is estimated to be \$17.43 million. This additional capacity alone is not sufficient to accommodate all new policy proposals, so several approaches were considered to accommodate various scenarios:

- a. Limit new policy investments to the estimated remaining revenues of \$17.43 million, divided according to regional priority, recognizing that not all of the proposals can be funded at maximum amounts described below with this approach
- b. Fund the project development proposal from the Step 2 funding capacity as it is already an eligible activity within Step 2

STEP 1.A. BOND COMMITMENTS FOR REGIONAL HIGH CAPACITY TRANSIT

Regional flexible funds have been used to help construct the region's high-capacity transit system. Since 1998, TriMet has issued bonds to pay for capital costs of high-capacity transit line construction, based on a regional commitment of flexible funds to repay the bonded debt. The repayment schedule for the existing bond commitment is \$16 million annually until 2027, thus the total existing amount in the three years covered in the 2019-21 RFFA committed to bond repayment is \$48 million.

New policy direction #1 – Increase to bond commitment for transit

The region has the opportunity to bond an additional amount of flexible funds to continue investing in the region's high-capacity transit (HCT) network. Bond proceeds will enable the region to help fund project planning and capital construction costs for the Powell-Division and Southwest Corridor transit investments. A HCT funding proposal submitted for evaluation should show projected return on bonding investment, estimated payoff schedule and ongoing commitment of regional funds, and projection of additional funding sources to be leveraged by a commitment of regional funds. By showing local commitment of its flexible funds, the region will be well-positioned to qualify for additional federal as well as other funding sources. This policy option would direct a commitment of an additional \$15.43 million (\$5.14 million annually) from the 2019-21 RFFA, to provide:

- \$25 million for the final design and construction of the Powell-Division high capacity transit bus project
- \$80 million to the Southwest Corridor project for planning, design, engineering and construction

Metro and TriMet have agreed that, as the planning and design of the Southwest Corridor and Powell-Division projects moves forward, opportunities to incorporate cost-effective pedestrian and bicycle connections between station areas and adjacent neighborhoods and

schools, particularly Title I schools, will be identified and that, to the extent consistent with federal project eligibility and funding limitations, will seek to integrate such meritorious elements into the project design.

TriMet has indicated that in order to maintain project schedules and timelines, there is a desire for the region to make a decision on a funding commitment prior to the regular RFFA scheduled decision point in January 2017. A funding proposal as described above will be submitted by TriMet prior to finalization of an IGA defining the bonding agreement between Metro and TriMet.

High-capacity transit bond commitment

Existing commitment	\$48.00 million
New commitment	\$15.43 million ⁹
TOTAL	\$63.43 million

STEP 1.B .PROJECT DEVELOPMENT BOND

New policy direction #5 – Project development

In response to new funding opportunities at the federal, state, regional and local levels, JPACT established a new bond commitment in the 2019-21 RFFA cycle for the purpose of project development.

JPACT recommends that \$3.78 million of Step 2 funding be used to develop a selected package of improvements to address regional active transportation needs, and freeway interchanges or arterials that are identified as significant system deficiencies, particularly in the areas of safety and freight delay.

For projects coordinated with freeway mainline and associated interchange elements, flexible funds will be invested as a part of a multi-agency approach to addressing multiple transportation issues around the mainline facilities, and would focus on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange, following policy direction established by the Regional Transportation Funding Approach (found in Section 4.0 of this document).

Regional flexible funds are to be used in a manner consistent with Section 4.0 of this policy report, the Regional Transportation Finance Approach that targets these funds to the connecting arterial portions of freeway interchange projects and Active Transportation projects. Bonding \$3.78 million of the flexible funds will create \$12 million in bond revenue for a regional freight and Active Transportation project development program to advance a package of multi-modal and multi-facility projects that can leverage discretionary federal

⁹ \$15.43 million is the total additional amount of funding committed to the high-capacity transit bond in the 2019-21 RFFA cycle. Future RFFA cycles will have a higher level of bond repayment commitment. See Table 3 for a complete bond repayment schedule and estimated amounts.

resources, support a 2017 legislative transportation funding effort and a 2018 regional transportation funding initiative. Bond revenue will be allocated in the following manner:

- \$10 million to be allocated to support arterial and related improvements associated with efforts already initiated by ODOT to develop projects to address three major regional bottlenecks; I-205 Abernethy Bridge, I-5/I-84 at the Rose Quarter, and Hwy 217 improvements
- \$2 million to be allocated to support project development and capital investment for active transportation projects, including Safe Routes to School for Title 1 schools, regional trails and other regionally significant active transportation facilities
- Require that before project development can proceed, candidate projects must be approved by JPACT

The region intends to use the project development and regional transit bonding allocations to position the region to win federal, state and local transportation funding increases. This is intended to be an ongoing effort that not only will address the three named ODOT projects, but will be a foundation for addressing the funding needs of further priority projects in the Regional Transportation Plan such as the Sunrise Corridor Phase II, improvements associated with development of the Basalt Creek Parkway area and jurisdictional transfer efforts such as Powell Boulevard.

Prior to final funding allocations, proposals that further define the specifics of each project will be submitted by project sponsors and evaluated by the RFFA project selection work group, as indicated in Table 4.

Project Development Bond Commitment

Arterial/related improvements on bottlenecks	\$1.89 million
Active Transportation	\$1.89 million
TOTAL	\$3.78 million¹⁰

¹⁰ \$3.78 million is the total additional amount of funding committed to the project development bond in the 2019-21 RFFA cycle. Future RFFA cycles will have differing level of bond repayment commitment. See Table 3 for a complete bond repayment schedule and amounts.

Table 3: Regional bond commitment repayment schedule (millions)

	Existing transit bond commitment	New transit bond commitment	New project development bond commitment	Total bond commitment
2019	\$16	\$5.14	\$1.26	\$22.40
2020	\$16	\$5.14	\$1.26	\$22.40
2021	\$16	\$5.14	\$1.26	\$22.40
2022	\$16	\$6.10	\$1.26	\$23.36
2023	\$16	\$6.10	\$1.26	\$23.36
2024	\$16	\$6.10	\$1.26	\$23.36
2025	\$16	\$6.10	\$1.26	\$23.36
2026	\$16	\$6.10	\$1.26	\$23.36
2027	\$16	\$6.10	\$1.26	\$23.36
2028		\$17.69	\$1.26	\$18.95
2029		\$17.69	\$1.26	\$18.95
2030		\$17.69	\$1.26	\$18.95
2031		\$17.69	\$1.26	\$18.95
2032		\$17.69	\$1.26	\$18.95
2033		\$17.69	\$1.26	\$18.95
2034		\$17.69	\$1.26	\$18.95

STEP 1.C. REGION-WIDE PROGRAM INVESTMENTS

Region-wide programs have been defined over time by their regional scope, program administration, and policy coordination and a consistent allocation of regional flexible funds to support them. In previous cycles, the allocation of funding to these programs was completed in Step 1 of the process, prior to the allocation of funds to local projects.

Funding targets are set for the existing region-wide programs in this cycle based on their historical allocation levels plus a 3 percent inflationary increase to address program costs and purchasing power. The region-wide programs will be reviewed prior to the final funding decision scheduled for the fall of 2016. The review will provide the following information about each program:

- Program description – description of the program purpose and its major activities.
- Regional Funding Strategy Context – description of why the program is appropriate for regional flexible funding (see Table 2: RTP Finance Approach chart).
- Directly related RTP performance targets –description of how the program helps the region meet performance targets in the RTP.
- Program strategic plan or recent planning work completed to date – description of how the strategic plan helps set priorities for implementation.

- Program performance to date – description of specific accomplishments of the program.
- Additional opportunities – description of priorities or activities the program would pursue given additional resources.

New policy direction #2 – Increase to RTO for Safe Routes to School

One of the needs identified through the stakeholder input process is the development of a regional Safe Routes to School (SRTS) funding program to support outreach and education activities in schools and communities. JPACT directed that regional activities and awarding grants to these programs will be funded through an additional allocation to the Regional Travel Options (RTO) program. The RTO program currently awards flexible funds through a grantmaking process. The policy proposal should define the elements necessary to create and sustain SRTS programs throughout the region, including local infrastructure needs identification, local program planning and technical assistance, local program funding, and a regional coordination role¹¹. New funding commitment is \$1.5 million (\$500K/yr).

New policy direction #3 – Increase to RTO for Climate Smart Strategies

The short list of Climate Smart Actions adopted through the Climate Smart Strategy policy identifies effective investments and activities the region can undertake in the 2015-16 timeframe to immediately begin following through on our regional commitment to reduce greenhouse gas emissions. One of these identified actions is to increase the regional funding commitment to the Regional Travel Options (RTO) program. JPACT directed that the policy proposal will define how an increased investment in the RTO program can assist and encourage more people to walk, bicycle, rideshare or take transit. An additional \$250,000 (\$83.3K/yr) will be directed towards grants to local government and community-based organizations to assist and encourage more people to walk, bicycle, rideshare or take transit.

New policy direction #4 – Increase to TSMO for Climate Smart Strategies

The short list of Climate Smart Actions adopted through the Climate Smart Strategy policy identifies effective investments and activities the region can undertake in the 2015-16 timeframe to immediately begin following through on our regional commitment to reduce greenhouse gas emissions. One of these identified actions is to increase the regional funding commitment to the Transportation Systems Management and Operations (TSMO) program. JPACT directed that the policy proposal will define how an increased investment in the TSMO program can result in technological improvements that smooth traffic flow and improve on-time performance and reliability. An additional \$250,000 (\$83.3K/yr) will be directed towards technological improvements that smooth traffic flow and improve on-time performance and reliability.

¹¹ The intent is for Metro to make grants and manage the SRTS program activities using existing staff capacity through the RTO program. The technical assistance and regional coordination roles are to be contracted out to a third-party provider.

Region-wide Program Funding Targets

Transit Oriented Development	\$9.87 million
TSMO/ITS	\$4.99 million
Additional TSMO/ITS – Climate Smart Strategies	\$0.25 million
Regional Travel Options	\$7.54 million
Additional RTO – Climate Smart Strategies	\$0.25 million
Additional RTO – Safe Routes to School	\$1.50 million
Regional MPO Planning (In-Lieu of Dues)	\$3.96 million
Corridor & Systems Planning	\$1.66 million
TOTAL	\$30.02 million¹²

STEP 2. COMMUNITY INVESTMENT FUND PROJECT FOCUS AREAS

The project focus areas established by JPACT during the 2014-15 RFFA for Step 2 were Active Transportation/Complete Streets and Regional Freight Investments. Funds for these projects targeted to a 75/25 percent split of Step 2 funding respectively. The 2019-21 RFFA cycle will continue to use the 2014-15 RFFA approach to investing in projects by focusing funds in order achieve greater regional impact.

JPACT and the Metro Council are continuing support for these project focus areas to create a more strategic approach to allocating funds, including:

- A topically or geographically focused impact rather than an array of disconnected projects
- Achieves appreciable impacts on implementing a regional scale strategy given funding amount available
- Addresses specific outcomes utilizing the Regional Transportation Plan Performance Targets
- Prioritizes catalytic investments (leveraging large benefits or new funding)
- Positions the region to take advantage of federal and state funding opportunities as they arise

In the development of the 2014-15 RFFA, a task force was created to advise JPACT and TPAC on project focus area needs, priorities and project prioritization factors and developed direction for the project focus areas. This policy construct will continue in the 2019-21 RFFA but with some modifications identified below to respond to recent policy development work and input received as a part of this policy update process.

As described in Step 1.B., for the 2019-21 RFFA cycle, JPACT has directed that \$3.78 million of Step 2 funding be used to develop a selected package of active transportation

¹² Target amount reflects a three percent increase from 2016-18 funding levels, maintaining the purchasing power of these steps.

improvements, and freeway interchanges or arterials that are identified as significant system deficiencies, particularly in the areas of safety and freight delay.

TriMet has agreed not to initiate projects to compete in the Step 2 process for the 2019-21 program allocations, although it may partner with others on applications. TriMet has expressed willingness to seek approval from its Board of Directors for approval for bonding or in other mechanisms to de-federalize funding that is directed by JPACT to be used for Safe Routes to Schools capital projects in the 2019-21 program allocations.

As a result of this policy direction, the total purchasing power for Step 2 projects has been reduced to the target levels indicated below.

Project Focus Area Funding Targets

Regional Freight Investments	\$7.34 million
Active Transportation/Complete Streets	\$25.81 million
TOTAL	\$33.15 million

REGIONAL FREIGHT INVESTMENTS

Recommended approach for developing projects

For this project focus area, the task force recommended an approach of allocating funds for two components: construction type projects and planning/strategy development type projects. Eligible project types and criteria that will be utilized to scope and prioritize potential projects are described below.

Construction focus

Capital improvements will focus on:

- System management, such as Intelligent Transportation Systems (ITS), on arterial freight routes. This could include upgrading traffic signal equipment and timing or provide travel information to inform freight trip decisions.
- Small capital projects (e.g. spot widening or installation of mountable curbs to accommodate large truck turning movements). Technical measures should be developed that assess the regional impacts of nominated projects such as improving access to regionally significant industrial land or safe movements to/on the regional freight network to ensure a regional interest is served by the project.

Planning/strategy development focus

Project development for specific arterial freight routes would evaluate key barriers to the development of a green economy and freight movement and recommend operations and design improvements to address the barrier.

Funds may also be set aside to develop regional strategies. These are areas that need further analysis and a policy development process to achieve a regional consensus on how to move forward on the issue.

Criteria for scoping and prioritization of Regional Freight Investments projects

Relative priority	Criteria
Highest	Can leverage (or prepare projects for) new or competitive funds
	Reduces freight vehicle delay
	Project increases freight access to: <ul style="list-style-type: none"> • Industrial lands • Employment centers & local businesses • Rail facilities for regional shippers
	Projects that help green the economy and offer economic opportunities for EJ/underserved communities ¹³
Higher	Improves safety by removing conflicts with active transportation or other modes, and/or provides adequate mitigation for any potential conflicts
	Reduces air toxics or particulate matter
	Reduces impacts to EJ communities (e.g., reduced noise, land use conflict, emissions)
	Increases freight reliability
Priority	May not get funding otherwise
	Reduces need for highway expansion
	Addresses issues and improves connectivity among multiple freight modes

ACTIVE TRANSPORTATION & COMPLETE STREETS

Recommended approach for developing projects

For this project focus area, the task force recommended an approach of selecting travel corridor/areas and identifying project elements that would address the most critical barriers to completing non-auto trips in the corridor/area or a concentrated portion of the corridor/area. Examples of barriers could be the lack of direct pedestrian or bicycle

¹³ Greening the economy means creating a low-carbon, resource-efficient and socially inclusive economy.

facilities to key destinations in the corridor, inability to safely cross streets to access destinations, or lack of access to transit stop improvements.

To implement this approach with available funding, the following parameters will be utilized:

- improvements will be concentrated geographically in a travel corridor/area or portion thereof,
- project design will consider guidance found in Chapter 9 of the Regional Active Transportation Plan,
- potentially merge portions of several planned projects and several project types (bicycle, trail, pedestrian, transit stops) into a unified corridor/area wide project,
- project development will be allowed as an eligible activity for funding to address project readiness issues or as part of a strategy to phase implementation of projects.

Criteria for scoping and prioritization of Active Transportation/Complete Streets projects

Relative Priority	Criteria
Highest	Project serves communities that have higher than average low-income, low-English proficiency, non-white, elderly and young populations
	Utilizes current plans and data to demonstrate improvements to safety: <ul style="list-style-type: none"> • in identified high-crash areas • by removing conflicts with freight and other vehicles
	Improves access to and from priority destinations: <ul style="list-style-type: none"> • Mixed-use centers • Large employment areas (by # of jobs) • Essential services for EJ/underserved communities • Schools
	Serves high density or projected high growth areas
Higher	Project completes a gap or improves a deficiency in the regional Active Transportation network
	Increase in use/ridership by providing a good user experience (refer to Active Transportation design criteria)
	Completes the “last mile” connection between transit and employment sites/areas
Priority	Includes outreach/education/engagement component

Relative Priority	Criteria
	Can leverage (or prepare projects for) new or competitive funds
	Reduces need for highway expansion

8.0 PROCESS

Over the next few months, Metro will conduct an evaluation process through which the 2019-21 RFFA investments will be considered and selected. For Step 1 investments, proposals will be developed which provide detail on how flexible funds will be spent, and to show consistency with regional policy direction and JPACT/Metro Council intent.

Step 2 project proposals will be selected through a competitive process, using input from:

1. technical evaluation
2. public comment, and
3. indicated sub-regional priorities.¹⁴

There will be an assessment of Step 2 project readiness to evaluate whether projects can be delivered for cost estimated and ability to obligate the revenues in the 2019-21 timeframe. This assessment of project readiness will be made available for potential recommendation to update the project application or condition the award of funds.

There will be a technical analysis of the TPAC-recommended package of projects relative to the allocation objectives (Section 6.0) for consideration prior to JPACT recommendation to Metro Council. A similar analysis will be conducted on the JPACT recommendation prior to Metro Council adoption of a final package of RFFA project investments.

Staff will prepare a document subsequent to this policy report which describes this process in further detail. A general timeline and milestone listing is below in Table 4:

¹⁴ There are four identified sub-regions: City of Portland, plus the portions of Clackamas, Multnomah (cities outside Portland) and Washington counties within the urbanized area.

Table 4: RFFA project selection timeline and process

May 2016	Metro will convene a work group comprised of TPAC members to refine and prepare an evaluation methodology with which Step 1 and Step 2 project proposals will be evaluated and ranked.
June - August	Jurisdictions will prepare Step 1 and Step 2 project proposals and submit to Metro.
September	The work group will conduct a technical evaluation of the proposals.
October	The list of projects and their technical evaluative scores will be put out for a 30-day public comment period.
November	The list of projects, along with their technical scores and public comment, will be provided to the county coordinating committees and the City of Portland. Those entities will consider this input in their deliberations on indicating their priority projects.
December	A list of projects, including technical scores, public comment and indicated priority status (if applicable) will be forwarded to TPAC for their recommendation. The TPAC recommendation will be evaluated for responsiveness to the RFFA objectives (Policy Section 6.0) and made available for a public comment opportunity prior to an adoption action by JPACT.
January 2017	The JPACT recommendation will be evaluated for responsiveness to the RFFA objectives (Policy Section 6.0) and made available for Metro Council action.