



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: **2018 RTP Finance work group meeting, #5**
 Date: Thursday, March 23, 2017
 Time: 1-3 p.m.
 Place: Metro Regional Center, Room 401
 Purpose: To discuss preliminary regional revenues totals and how they will be used, review remaining needed corrections to local revenue templates, and provide an overview of the upcoming RTP project solicitation process
 Outcome(s): Understand preliminary revenue totals and how they will be used as part of the upcoming RTP project solicitation process

1 p.m. **Welcome & introductions** Ted Leybold

1:05 p.m. **Partner Updates** Everyone
 Who have you talked to about this work? What have you heard?

1:15 p.m. **Constrained Revenue Update** Ken Lobeck

- State revenue forecast issues
- Washington County corrective items: Beaverton, Tualatin, etc.
- TriMet local revenues
- Finalize SMART revenues
- Discounting revenues into 2016 dollars to avoid need for later project cost inflationary escalations

2 p.m. **RTP Call for Projects** Tom Kloster

- Requirements, process, and submission steps overview

2:25 p.m. **New Revenues for Constrained or Strategic Element Question** Ken Lobeck

- Identify new revenues for constrained or strategic financial elements
- For constrained must meet reasonable availability of funds definition

2:50 p.m. **Summary and Next Steps** Ted Leybold
 Update/review/discussion with desired outcome/action steps

3 p.m. **Adjourn**

Meeting Packet	Next Meeting
<ul style="list-style-type: none"> • Agenda and Slides • Revenue Comparison Summary • Building the 2018 RTP Investment Strategy Process and Timeline Overview • Information on 2018 RTP Call for Projects & Programs 	TBD

RTP Finance Work Group leader:

Ken Lobeck, Funding Programs Lead, Metro

Tel: 503-797-1785, Email: ken.lobeck@oregonmetro.gov

Directions, travel options and parking information

Covered bike racks are located on the north plaza and inside the Irving Street visitor garage. Metro Regional Center is on TriMet bus line 6 and the streetcar, and just a few blocks from the Rose Quarter Transit Center, two MAX stations and several other bus lines. Visit our website for more information: <http://www.oregonmetro.gov/metro-regional-center>

Getting there with adequate resources



2018 REGIONAL TRANSPORTATION PLAN UPDATE
Finance Plan & Revenue Forecasts

RTP Finance Work Group Meeting
March 23, 2017

Ken Lobeck, RTP Finance Plan Manager
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Agenda

- Welcome, intros, and administrative items
- Partner updates
- Constrained Revenue Update
- RTP Call for Projects
- New Revenues for Constrained or Strategic Element Question
- Summary and next steps:
 - No further meetings planned
 - Remaining requirements and coordination can occur individually
- Adjourn

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Agenda

Partner Updates

- Discussion areas related to transportation funding or other areas?
- Policy updates to share?
- Issues or concerns about transportation emerging in your agency?

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Agenda

Constrained Revenue Update

- Delays and more delays – We lost December through February due to new MTIP and STIP amendment requirements and rules:
 - Complete new MTIP amendment process has to be developed and implemented
 - New Public Notification Plan had to be developed and implemented for MTIP and STIP amendments
 - New coordination processes with ODOT must be developed
 - New documentation trail including formal narratives and fiscal constraint demonstration
 - No grandfathering of projects or phase-in period

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Constrained Revenue Update State Revenue Forecast

- Remaining Revenue issues and refinements:
 - State revenue forecast now developed, but...
 - Identified funds only to the state level and at the program level
 - Not identified to the fund code level
 - Example: Funding for Modernization (Enhanced) identified to state level and not region 1 Level
 - Did not identify individual federal funds such as:
 - Interstate Maintenance (IM)
 - National Highway Performance Program (NHPP)
 - National Highway System (NHS)
 - Had to developed a regional allocation methodology
 - Methodology needs to be validated or adjusted

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State Revenue Issues Sample Methodology

2018 RTP Financial Plan State Revenue Sources - Federal Fund Sources Highway Freight Program									
Year	State Revenue (YOE \$)	Percent of State Revenue to Region 1	Percent		Metro Area Revenues (YOE \$)	Revenues Discounted for Inflation (2016 \$)	RTP Segment Year Totals	RTP Division Year Totals	
			Region 1 Allocation (YOE \$)	Remaining in MPO Boundary Area				Year	Year
2016	\$ 13,400,000	31.0%	\$ 4,154,000	81.0%	\$ 3,364,740	\$ 4,595,130			
2017	\$ 13,700,000	31.0%	\$ 4,247,000	81.0%	\$ 3,440,071	\$ 3,397,445			
2018	\$ 14,000,000	31.0%	\$ 4,340,000	81.0%	\$ 3,515,400	\$ 3,264,471	2018 to	2018	
2019	\$ 14,300,000	31.0%	\$ 4,433,000	81.0%	\$ 3,590,730	\$ 3,231,826	2020	to	
2020	\$ 14,600,000	31.0%	\$ 4,526,000	81.0%	\$ 3,666,060	\$ 3,199,508	\$ 9,695,809	2027	
2021	\$ 14,900,000	31.0%	\$ 4,619,000	81.0%	\$ 3,741,390	\$ 3,167,513			
2022	\$ 15,300,000	31.0%	\$ 4,743,000	81.0%	\$ 3,841,830	\$ 3,135,838	to		
2023	\$ 15,600,000	31.0%	\$ 4,836,000	81.0%	\$ 3,917,160	\$ 3,104,479	2025		
2024	\$ 15,900,000	31.0%	\$ 4,929,000	81.0%	\$ 3,992,490	\$ 3,073,434			
2025	\$ 16,300,000	31.0%	\$ 5,053,000	81.0%	\$ 4,090,930	\$ 3,042,700	\$ 15,533,964		
2026	\$ 16,700,000	31.0%	\$ 5,177,000	81.0%	\$ 4,189,370	\$ 3,012,270	2026		
2027	\$ 17,000,000	31.0%	\$ 5,270,000	81.0%	\$ 4,268,700	\$ 2,982,150	to	\$ 31,214,192	
2028	\$ 17,400,000	31.0%	\$ 5,394,000	81.0%	\$ 4,369,140	\$ 2,952,320	2030	2028	
2029	\$ 17,800,000	31.0%	\$ 5,518,000	81.0%	\$ 4,469,580	\$ 2,922,806	to	to	
2030	\$ 18,200,000	31.0%	\$ 5,642,000	81.0%	\$ 4,570,020	\$ 2,893,577	\$ 14,763,135	2040	
2031	\$ 18,600,000	31.0%	\$ 5,766,000	81.0%	\$ 4,670,460	\$ 2,864,644	2031		
2032	\$ 19,000,000	31.0%	\$ 5,890,000	81.0%	\$ 4,770,900	\$ 2,835,895	to		
2033	\$ 19,400,000	31.0%	\$ 6,014,000	81.0%	\$ 4,871,340	\$ 2,807,635	2035		
2034	\$ 19,800,000	31.0%	\$ 6,138,000	81.0%	\$ 4,971,780	\$ 2,779,559			
2035	\$ 20,300,000	31.0%	\$ 6,283,000	81.0%	\$ 5,097,330	\$ 2,751,763	\$ 14,039,595		
2036	\$ 20,700,000	31.0%	\$ 6,417,000	81.0%	\$ 5,197,770	\$ 2,724,248	2038		
2037	\$ 21,200,000	31.0%	\$ 6,572,000	81.0%	\$ 5,323,320	\$ 2,697,001	to		
2038	\$ 21,600,000	31.0%	\$ 6,696,000	81.0%	\$ 5,423,760	\$ 2,670,033	2040		
2039	\$ 22,100,000	31.0%	\$ 6,851,000	81.0%	\$ 5,549,310	\$ 2,643,333			
2040	\$ 22,600,000	31.0%	\$ 7,006,000	81.0%	\$ 5,674,860	\$ 2,616,800	\$ 13,351,515	\$ 36,159,821	
Totals	\$ 440,400,000		\$ 136,524,000		\$ 110,584,440	\$ 67,374,011	\$ 67,374,011	\$ 67,374,011	

Funding tables ID revenues only to the state level

Set 31% of total to be allocated to Region 1

Of the 31% total, 81% will be applied in the MPO boundary areas

Split revenues into YOE and 2016 \$ discounted

Selected 2016\$ discounted as final revenue levels for RTP

Avoids having to inflate project costs later to balance against YOE amounts

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Constrained Revenue Update Remaining Issues

- Remaining Revenue issues and refinements:
 - Washington County corrective actions to several local revenue templates
 - Complete transit revenue piece
 - Finalize SMART revenues
 - Recheck to ensure all revenues are discounted
- Discounting eliminates project cost escalations – not using Year of Expenditure (YOE) revenues
- However, revenues will appear lower than from 2014 RTP

Constrained Revenue Update The Picture is Forming for Capital Requirements

* DRAFT *

City of Portland, Clackamas County, Multnomah County, and Washington County
Revenue Range Comparisons - CAPITAL REVENUES
Page 3

Agency	2018 Local Capital Revenue	RTP Time Period 1: 2018-2027 Funding Range Comparison Available for Capital Needs										2018-2027 Total for Capital		2018-2027 Total for Capital
		Total Local Capital Revenue	Percent Factor	Federal BIFA Step 2 at 75%	Federal BIFA Step 2 at 100%	Federal BIFA Step 2 at 125%	State at 75%	State at 100%	State at 125%	Federal Discretionary (Non-Transit)	Total 2018-2027	Total 2018-2027		
City of Portland	\$ 24,463,846	\$ 244,638,462	75%	\$ 26,516,372	\$ 36,020,494	\$ 44,228,620	\$ 38,941,937	\$ 52,613,363	\$ 65,769,228	\$ 318,693,191	\$ 426,326,479	\$ 712,463,999	\$ 712,463,999	
	\$ 24,463,846	\$ 244,638,462	100%	\$ 36,020,494	\$ 48,027,324	\$ 58,967,520	\$ 51,889,216	\$ 68,951,151	\$ 87,685,604	\$ 426,326,479	\$ 568,353,803	\$ 984,817,802	\$ 984,817,802	
	\$ 24,463,846	\$ 244,638,462	125%	\$ 45,025,618	\$ 60,034,162	\$ 73,734,400	\$ 64,677,895	\$ 86,191,441	\$ 110,237,336	\$ 568,353,803	\$ 744,061,240	\$ 1,212,414,543	\$ 1,212,414,543	
Clackamas County	\$ 18,883,172	\$ 188,831,720	75%	\$ 16,881,008	\$ 22,508,000	\$ 27,760,000	\$ 24,392,000	\$ 32,508,000	\$ 41,260,000	\$ 211,117,000	\$ 281,353,000	\$ 492,470,000	\$ 492,470,000	
	\$ 18,883,172	\$ 188,831,720	100%	\$ 22,508,000	\$ 30,010,667	\$ 36,766,667	\$ 32,508,000	\$ 43,344,000	\$ 54,680,000	\$ 281,353,000	\$ 373,861,333	\$ 655,214,333	\$ 655,214,333	
	\$ 18,883,172	\$ 188,831,720	125%	\$ 28,135,000	\$ 37,513,333	\$ 45,958,333	\$ 40,634,000	\$ 53,680,000	\$ 68,360,000	\$ 373,861,333	\$ 492,470,000	\$ 866,331,333	\$ 866,331,333	
Multnomah County	\$ 4,883,498	\$ 48,834,980	75%	\$ 4,395,100	\$ 5,860,000	\$ 7,225,000	\$ 6,410,000	\$ 8,540,000	\$ 10,710,000	\$ 33,900,000	\$ 44,810,000	\$ 78,710,000	\$ 78,710,000	
	\$ 4,883,498	\$ 48,834,980	100%	\$ 5,860,000	\$ 7,746,667	\$ 9,613,333	\$ 8,540,000	\$ 11,386,667	\$ 14,513,333	\$ 44,810,000	\$ 59,326,667	\$ 104,136,667	\$ 104,136,667	
	\$ 4,883,498	\$ 48,834,980	125%	\$ 7,330,000	\$ 9,683,333	\$ 12,033,333	\$ 10,710,000	\$ 14,013,333	\$ 18,166,667	\$ 59,326,667	\$ 77,440,000	\$ 131,566,667	\$ 131,566,667	
Washington County	\$ 38,043,676	\$ 380,436,760	75%	\$ 34,239,300	\$ 45,652,000	\$ 57,065,000	\$ 50,430,000	\$ 67,240,000	\$ 84,050,000	\$ 267,070,000	\$ 351,120,000	\$ 618,190,000	\$ 618,190,000	
	\$ 38,043,676	\$ 380,436,760	100%	\$ 45,652,000	\$ 60,869,333	\$ 76,086,667	\$ 67,240,000	\$ 89,653,333	\$ 112,866,667	\$ 351,120,000	\$ 463,986,667	\$ 814,106,667	\$ 814,106,667	
	\$ 38,043,676	\$ 380,436,760	125%	\$ 58,328,000	\$ 77,781,333	\$ 97,608,333	\$ 86,010,000	\$ 113,540,000	\$ 144,566,667	\$ 463,986,667	\$ 608,546,667	\$ 1,072,533,333	\$ 1,072,533,333	

* NOTE *

All revenues identified on this worksheet are considered draft placeholder values. Further refinement and adjustments will be according to Federal, state, and local revenues. Transit revenue projections are not yet included as well.

Agency	2018 Local Capital Revenue	RTP Time Period 2: 2028-2040 Funding Range Comparison Available for Capital Needs										Projected Revenues Available for This Transit Capital Needs			
		Total Local Capital Revenue	Percent Factor	Federal BIFA Step 2 at 75%	Federal BIFA Step 2 at 100%	Federal BIFA Step 2 at 125%	State at 75%	State at 100%	State at 125%	Federal Discretionary (Non-Transit)	Total 2028-2040	Agency at 75%	Agency at 100%	Agency at 125%	
City of Portland	\$ 24,463,846	\$ 244,638,462	75%	\$ 26,516,372	\$ 36,020,494	\$ 44,228,620	\$ 38,941,937	\$ 52,613,363	\$ 65,769,228	\$ 318,693,191	\$ 426,326,479	\$ 712,463,999	\$ 712,463,999		
	\$ 24,463,846	\$ 244,638,462	100%	\$ 36,020,494	\$ 48,027,324	\$ 58,967,520	\$ 51,889,216	\$ 68,951,151	\$ 87,685,604	\$ 426,326,479	\$ 568,353,803	\$ 984,817,802	\$ 984,817,802		
	\$ 24,463,846	\$ 244,638,462	125%	\$ 45,025,618	\$ 60,034,162	\$ 73,734,400	\$ 64,677,895	\$ 86,191,441	\$ 110,237,336	\$ 568,353,803	\$ 744,061,240	\$ 1,212,414,543	\$ 1,212,414,543		
Clackamas County	\$ 18,883,172	\$ 188,831,720	75%	\$ 16,881,008	\$ 22,508,000	\$ 27,760,000	\$ 24,392,000	\$ 32,508,000	\$ 41,260,000	\$ 211,117,000	\$ 281,353,000	\$ 492,470,000	\$ 492,470,000		
	\$ 18,883,172	\$ 188,831,720	100%	\$ 22,508,000	\$ 30,010,667	\$ 36,766,667	\$ 32,508,000	\$ 43,344,000	\$ 54,680,000	\$ 281,353,000	\$ 373,861,333	\$ 655,214,333	\$ 655,214,333		
	\$ 18,883,172	\$ 188,831,720	125%	\$ 28,135,000	\$ 37,513,333	\$ 45,958,333	\$ 40,634,000	\$ 53,680,000	\$ 68,360,000	\$ 373,861,333	\$ 492,470,000	\$ 866,331,333	\$ 866,331,333		

Constrained Revenue Update Local Revenues for Capital Requirements

- Removed O&M identified revenues using template averages
- Remaining revenues for capital needs in each RTP time period

Agency	2018 Annual Local Revenues			RTP Time Period 1: 2018-2027		RTP Time Period 2: 2028-2040	
	Annual Local Revenue Range			2018-2027 Revenue Range		2028-2040 Revenue Range	
	2018 Total Local Revenues	Annual Capital Percent	2018 Capital Amount	2018-2027 Local Revenues Total	2018-2027 Local Revenues for Capital Needs	2028-2040 Local Revenues Total	2028-2040 Revenues for Capital Needs
City of Portland	\$ 305,823,102	8.0%	\$ 24,465,848	\$ 3,056,231,020	\$ 244,658,483	\$ 3,975,700,326	\$ 318,056,026
Clackamas County	\$ 79,412,688	25.0%	\$ 19,853,172	\$ 800,122,198	\$ 200,030,550	\$ 1,069,167,459	\$ 267,291,869
Multnomah County	\$ 27,413,983	25.0%	\$ 6,853,496	\$ 274,139,830	\$ 68,534,958	\$ 356,381,779	\$ 89,095,445
Washington County	\$ 152,262,711	25.0%	\$ 38,065,678	\$ 1,730,562,934	\$ 432,640,734	\$ 2,934,696,202	\$ 733,674,051
				Of total local revenues	County = 25% Portland = 8%	Of total local revenues	County = 25% Portland = 8%

Constrained Revenue Update RFFA Step 2 Allocations

- Examined possible RFFA Step 2 regional allocations ranging from 75% to 125% for Portland and 3 counties using population formula distribution

2040 Population Shares	Possible Federal RFFA Funds - Step 2 Allocation Ranges					
	2018-2027 Time Period			2028-2040 Time Period		
	at 75%	At 100%	At 125%	at 75%	at 100%	at 125%
40.67%	\$ 26,535,372	\$ 35,380,496	\$ 44,225,620	\$ 59,475,834	\$ 79,301,112	\$ 99,126,391
16.69%	\$ 10,891,005	\$ 14,521,340	\$ 18,151,675	\$ 24,410,873	\$ 32,547,831	\$ 40,684,789
9.10%	\$ 5,939,160	\$ 7,918,880	\$ 9,898,600	\$ 13,311,910	\$ 17,749,213	\$ 22,186,516
33.54%	\$ 21,884,463	\$ 29,179,284	\$ 36,474,105	\$ 49,051,382	\$ 65,401,843	\$ 81,752,304
100.00%	\$ 65,250,000	\$ 87,000,000	\$ 108,750,000	\$ 146,250,000	\$ 195,000,000	\$ 243,750,000

Ranges are based on a population proportional share

Constrained Revenue Update Regional Allocations of State Revenue Programs

- Added a regional allocation of State Mod-L, HBRR-L, Connect Oregon (non transit), and HSIP based on population with a 75%-125% range

Agency	State Allocations RTP Time Period 1: 2018-2027			State Allocations RTP Time Period 2: 2028-2040		
	at 75%	at 100%	at 125%	at 75%	at 100%	at 125%
City of Portland	\$ 38,461,937	\$ 52,613,362	\$ 66,764,787	\$ 49,296,349	\$ 65,728,762	\$ 82,161,174
Clatsop County	\$ 26,596,326	\$ 35,461,768	\$ 44,327,210	\$ 33,447,254	\$ 44,596,340	\$ 55,765,382
Multnomah County	\$ 8,832,800	\$ 11,776,400	\$ 14,720,000	\$ 11,053,577	\$ 14,714,426	\$ 18,389,295
Washington County	\$ 32,545,032	\$ 43,393,378	\$ 54,241,720	\$ 40,656,340	\$ 54,208,521	\$ 67,969,402
Totals:	\$ 106,436,095	\$ 143,245,308	\$ 180,053,717	\$ 134,453,510	\$ 180,258,351	\$ 224,325,253

State Funds	RTP Time Period 1: 2018-2027					RTP Time Period 2: 2028-2040				
	Mod-L	HBRR-L	Connect Oregon Bike and Ped	HSIP	Total	Mod-L	HBRR-L	Connect Oregon Bike and Ped	HSIP	Total
Totals:	\$ 23,294,171	\$ 60,594,850	\$ 14,540,000	\$ 30,861,720	\$ 129,390,741	\$ 20,964,941	\$ 71,160,848	\$ 28,590,000	\$ 33,093,972	\$ 133,809,761

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Constrained Revenue Update Added Revenue ODOT Programs

- Added remaining State programs for ODOT revenues based on a 31% allocation to Region 1... and 81% of the 31% would remain in the MPO boundary area

ODOT Program Funding - Federal and State Funds										CMTIA ONLY SPV, Mod, Rail & Misc	
OMSP	FLAP-L/FLAP-S	HFP	Mod-S	Rail Crossing	Misc.	Mod-State	SPR	Totals			
\$ 1,036,353,760	\$ -	\$ 31,214,192	\$ 23,294,173	\$ 4,755,310	\$ 6,988,252	\$ 122,760,292	\$ 23,239,493	\$ 1,250,609,471	2018-2027:	\$ 191,012,219	
\$ 1,300,560,000	\$ -	\$ 36,159,821	\$ 26,984,941	\$ 7,825,633	\$ 8,095,482	\$ 142,210,000	\$ 26,921,597	\$ 1,468,737,474	2018-2040:	\$ 271,275,877	
\$ 2,336,913,760	\$ -	\$ 67,374,013	\$ 50,279,114	\$ 14,580,943	\$ 15,083,734	\$ 264,970,292	\$ 50,161,090	\$ 2,489,346,945	Total:	\$ 462,288,096	

Operations	Maintenance	Paving	Systems Preservation	Fix-it	Non-Capacity Enhancing	On-System
Assumed out of the MPO boundary	Assumed out of the MPO boundary	Assumed out of the MPO boundary	Assumed out of the MPO boundary	Assumed out of the MPO boundary	Assumed out of the MPO boundary	Assumed out of the MPO boundary
On-System Goods Movement Focused	On-System Capacity Enhancing	On or Off OC/CA Safety	Smaller programs grouped together Assumed Federal	On-System State Funds Committed to Modernization Needs Capacity Enhancing Modernization-State	State Planning & Research Funds	

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Constrained Revenue Update Identified Possible Federal Discretionary

- Added a federal discretionary grant revenue factor into ODOT revenues. Also can apply regionally as well (Tiger, and others identified primarily off-system)

Federal Discretionary Grant Assumptions (Non Transit)			
Grant Program	2018-2027	2028-2040	Total
ITS (On)	\$ 15,000,000	\$ 20,000,000	\$ 35,000,000
FAST Lne (On)	\$ 50,000,000	\$ 60,000,000	\$ 110,000,000
Freight (On)	\$ 20,000,000	\$ 25,000,000	\$ 45,000,000
Tiger (Off sys)	\$ 20,000,000	\$ 25,000,000	\$ 45,000,000
Total:	\$ 105,000,000	\$ 130,000,000	\$ 235,000,000
FAST Lane, Freight = on-system at 1 award per RTP period. Tiger & ITS off system at 2 per RTP period.			

Constrained Revenue Update RFFA Step 1 Revenues for Capital Requirements

- Added RFFA Step 1 revenues that could be considered capital related

RFFA Step 1 Summary				2019-21 RFFA Summary		
Program Area	2018-2027	2028-2040	Totals	Step	Amount	%
HCT				Step 1:	\$ 97,230,000	74.6%
RTO				Step 2:	\$ 33,150,000	25.4%
TSMO	\$ 401,880,000	\$ 624,611,000	\$ 1,026,491,000	Total:	\$ 130,380,000	100.0%
Planning						
Bond Payment						
Step 1 %	82.2%	76.2%	\$ 1,026,491,000			
Step 2 %	17.8%	23.8%	\$ 282,000,000			
Total:	100.0%	100.0%	\$ 1,308,491,000			

Step 2: Community Investment Fund			
Project name	Applicant	Sub-region	Amount
Active Transportation/Complete Streets			
Reverchon Creek Trail	TriMet	Washington	\$3,693,312
Development and Region Safe Routes to School	City of Portland	Portland	\$2,200,000
To be determined	City of Gresham	Multnomah	\$3,141,156
Cully Walking and Biking Parkways	City of Portland	Portland	\$2,200,000
Collins Street Safety and Access to Transit	City of Portland	Portland	\$4,400,000
Menomonee Road Walking and Biking Improvements	City of Tualatin	Washington	\$625,000
Highway 43 Walking and Biking Improvements	City of West Linn	Clackamas	\$9,000,000
21st Walking and Biking Bridge	City of Astoria	Clackamas	\$1,900,000
Safe and Multimodal Connected Centers	City of Portland	Portland	\$9,200,000
Mobile Avenue Walking and Biking Improvements	City of Oregon City	Clackamas	\$8,800,000
Total:			\$54,800,000
Regional Freight Initiatives			
Project name	Applicant	Sub-region	Amount
South Creek Parkway Extension	Washington County	Washington	\$2,803,600
Central Business Access & Circulation Improvements	City of Portland	Portland	\$2,803,876
Woodbar Road Industrial Area	City of Eugene	Washington	\$1,750,516
Regional Freight Studies	Metrop	Regional	To be determined
Total:			\$7,358,000

Constrained Revenue Update Draft Regional Revenue Range Comparisons

RTP Time Period 1: 2018-2027 Funding Range Comparison Available for Capital Needs												
2018 Local Capital Revenue	2018-2027 Total Local Capital Revenue	Percent Factor	Federal RFFA Step 2 at 75%	Federal RFFA Step 2 at 100%	Federal RFFA Step 2 at 125%	State at 75%	State at 100%	State at 125%	Federal Discretionary (Non Transit)	Total 2018-2027	Total 2018-2040	2018-2040 per Total for Capital
	\$ 244,658,482	75%	\$ 28,533,372			\$ 39,461,537				\$ 310,655,391	\$ 426,620,429	\$ 737,483,800
\$ 24,465,848	\$ 244,658,482	100%		\$ 95,080,496			\$ 52,615,382			\$ 332,654,360	\$ 463,085,870	\$ 795,740,230
	\$ 244,658,482	125%			\$ 44,325,620			\$ 65,769,228		\$ 354,655,330	\$ 450,904,006	\$ 805,557,336
	\$ 300,030,930	75%	\$ 10,891,005			\$ 16,196,336				\$ 227,117,890	\$ 311,935,692	\$ 539,053,582
\$ 19,853,172	\$ 300,030,930	100%		\$ 14,521,340			\$ 21,595,114			\$ 236,147,004	\$ 326,816,968	\$ 562,963,972
	\$ 300,030,930	125%			\$ 18,151,675			\$ 26,993,893		\$ 245,176,117	\$ 341,696,243	\$ 586,872,461
	\$ 48,534,958	75%	\$ 5,939,360			\$ 8,832,300				\$ 83,506,417	\$ 113,440,932	\$ 196,947,349
\$ 4,853,496	\$ 48,534,958	100%		\$ 7,918,880			\$ 11,776,400			\$ 88,230,237	\$ 121,556,094	\$ 209,786,312
	\$ 48,534,958	125%			\$ 9,898,600			\$ 14,720,500		\$ 93,134,037	\$ 129,671,257	\$ 222,625,314
	\$ 432,640,734	75%	\$ 21,884,483			\$ 32,545,032				\$ 487,070,228	\$ 623,381,674	\$ 1,310,451,902
\$ 38,065,678	\$ 432,640,734	100%		\$ 29,179,284			\$ 43,593,376			\$ 508,213,393	\$ 653,284,215	\$ 1,358,497,609
	\$ 432,640,734	125%			\$ 36,474,105			\$ 54,241,720		\$ 523,356,534	\$ 683,186,756	\$ 1,406,543,315

Constrained Revenue Update Emerging Picture of Total Revenues for Capital Needs

Agency	Projections of Revenues for Capital Needs		
	Summary at 100% Levels		
	2017-2028	2028-2040	Total
Portland:	\$ 332,654,360	\$ 463,085,870	\$ 795,740,230
Clackamas County:	\$ 236,147,004	\$ 326,816,968	\$ 562,963,972
Multnomah County:	\$ 88,230,237	\$ 121,556,094	\$ 209,786,332
Washington County:	\$ 505,213,393	\$ 853,284,215	\$ 1,358,497,609
RFFA Step 1 (Metro):	\$ 301,410,000	\$ 468,458,250	\$ 769,868,250
ODOT Region 1:	\$ 276,012,219	\$ 326,275,877	\$ 602,288,096
Transit:	In development	In development	\$ -
Total:	\$ 1,739,667,214	\$ 2,559,477,274	\$ 4,299,144,488

Note: The above does not represent the total revenue picture. It represents only estimated funds for capital needs. All related O&M related funds were removed.

Agenda
RTP Call for Projects

- Overview
- Requirements
- Process steps
- Submission steps, etc...
- Handout – Information on 2018 RTP Call for Projects and Programs

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Agenda
**New Revenues for RTP Constrained
or Strategic Element**

- Time to identify any new revenues for the RTP
- Or, work through the JPACT Finance subcommittee
- For RTP Constrained or Strategic Element
- Tell Metro:
 - What it is..Describe the program clearly
 - Explain revenue generation and collection methodology
 - Identify annual revenue amounts
 - Will program sunset? Include a growth factor?

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Agenda

Summary Updates, & Next Steps

- Handout – Building the 2018 RTP Investment Strategy
- Timeline for 2017 and 2018 for Call for projects, strategy, and adoption process.
- Revenue forecast planned to be presented to TPAC at April 28, 2017 meeting
- Final clean-up of revenue methodologies required
- June 1, 2017 RTP Project Call requests
- See handout timeline for 2017 summer & fall actions
- Last official meeting of the RTP Finance Work Group

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Questions?

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Stay connected at www.oregonmetro.gov/rtp



**City of Portland, Clackamas County, Multnomah County, and Washington County
Revenue Range Comparisons - CAPITAL REVENUES
Page 1**



RTP Time Period 1: 2018-2027 Funding Range Comparison Available for Capital Needs													
Agency	2018 Local Capital Revenue	2018-2027 Total Local Capital Revenue	Percent Factor	Federal RFFA Step 2 at 75%	Federal RFFA Step 2 at 100%	Federal RFFA Step 2 at 125%	State at 75%	State at 100%	State at 125%	Federal Discretionary (Non Transit)	Total 2018-2027	Total 2028-2040	2018-2040 All Total for Capital
City of Portland	\$ 24,465,848	\$ 244,658,482	75%	\$ 26,535,372			\$ 39,461,537				\$ 310,655,391	\$ 426,828,409	\$ 737,483,800
		\$ 244,658,482	100%		\$ 35,380,496			\$ 52,615,382			\$ 332,654,360	\$ 463,085,870	\$ 795,740,230
		\$ 244,658,482	125%			\$ 44,225,620			\$ 65,769,228		\$ 354,653,330	\$ 450,904,006	\$ 805,557,336
Clackamas County	\$ 19,853,172	\$ 200,030,550	75%	\$ 10,891,005			\$ 16,196,336				\$ 227,117,890	\$ 311,935,692	\$ 539,053,582
		\$ 200,030,550	100%		\$ 14,521,340			\$ 21,595,114			\$ 236,147,004	\$ 326,816,968	\$ 562,963,972
		\$ 200,030,550	125%			\$ 18,151,675			\$ 26,993,893		\$ 245,176,117	\$ 341,698,243	\$ 586,874,361
Multnomah County	\$ 6,853,496	\$ 68,534,958	75%	\$ 5,939,160			\$ 8,832,300				\$ 83,306,417	\$ 113,440,932	\$ 196,747,349
		\$ 68,534,958	100%		\$ 7,918,880			\$ 11,776,400			\$ 88,230,237	\$ 121,556,094	\$ 209,786,332
		\$ 68,534,958	125%			\$ 9,898,600			\$ 14,720,500		\$ 93,154,057	\$ 129,671,257	\$ 222,825,314
Washington County	\$ 38,065,678	\$ 432,640,734	75%	\$ 21,884,463			\$ 32,545,032				\$ 487,070,228	\$ 823,381,674	\$ 1,310,451,902
		\$ 432,640,734	100%		\$ 29,179,284			\$ 43,393,376			\$ 505,213,393	\$ 853,284,215	\$ 1,358,497,609
		\$ 432,640,734	125%			\$ 36,474,105			\$ 54,241,720		\$ 523,356,558	\$ 883,186,756	\$ 1,406,543,315

*** NOTE ***
All revenues identified on this worksheet are considered draft placeholder values. Further refinement and adjustments will be occurring to federal, state, and local revenues. Transit revenue projections are not yet included as well.

RTP Time Period 2: 2028-2040 Funding Range Comparison Available for Capital Needs												
Agency	2018 Local Capital Revenue	2028-2040 Total Local Capital Revenue	Percent Factor	Federal RFFA Step 2 at 75%	Federal RFFA Step 2 at 100%	Federal RFFA Step 2 at 125%	State at 75%	State at 100%	State at 125%	Federal Discretionary (Non Transit)	Total 2028-2040	
City of Portland	\$ 24,465,848	\$ 318,056,026	75%	\$ 59,475,834			\$ 49,296,549				\$ 426,828,409	
		\$ 318,056,026	100%		\$ 79,301,112			\$ 65,728,732			\$ 463,085,870	
		\$ 318,056,026	125%			\$ 99,126,391			\$ 33,721,590		\$ 450,904,006	
Clackamas County	\$ 19,853,172	\$ 267,291,865	75%	\$ 24,410,873			\$ 20,232,954				\$ 311,935,692	
		\$ 267,291,865	100%		\$ 32,547,831			\$ 26,977,272			\$ 326,816,968	
		\$ 267,291,865	125%			\$ 40,684,789			\$ 33,721,590		\$ 341,698,243	
Multnomah County	\$ 6,853,496	\$ 89,095,445	75%	\$ 13,311,910			\$ 11,033,577				\$ 113,440,932	
		\$ 89,095,445	100%		\$ 17,749,213			\$ 14,711,436			\$ 121,556,094	
		\$ 89,095,445	125%			\$ 22,186,516			\$ 18,389,295		\$ 129,671,257	
Washington County	\$ 38,065,678	\$ 733,674,051	75%	\$ 49,051,382			\$ 40,656,241				\$ 823,381,674	
		\$ 733,674,051	100%		\$ 65,401,843			\$ 54,208,321			\$ 853,284,215	
		\$ 733,674,051	125%			\$ 81,752,304			\$ 67,760,402		\$ 883,186,756	

Projected Revenues Available for Non Transit Capital Needs			
2018-2027			
Agency or Program	At 75% Capacity	At 100% Capacity	At 125% Capacity
Portland	\$ 310,655,391	\$ 332,654,360	\$ 354,653,330
Clackamas	\$ 227,117,890	\$ 236,147,004	\$ 245,176,117
Multnomah	\$ 83,306,417	\$ 88,230,237	\$ 93,154,057
Washington	\$ 487,070,228	\$ 505,213,393	\$ 523,356,558
RFFA Step 1	\$ 301,410,000	\$ 401,880,000	\$ 502,350,000
Discretionary	\$ 78,750,000	\$ 105,000,000	\$ 131,250,000
Total:	\$ 1,488,309,927	\$ 1,669,124,995	\$ 1,849,940,063
2028-2040			
Portland	\$ 426,828,409	\$ 463,085,870	\$ 450,904,006
Clackamas	\$ 311,935,692	\$ 326,816,968	\$ 341,698,243
Multnomah	\$ 113,440,932	\$ 121,556,094	\$ 129,671,257
Washington	\$ 823,381,674	\$ 853,284,215	\$ 883,186,756
RFFA Step 1	\$ 468,458,250	\$ 624,611,000	\$ 780,763,750
Discretionary	\$ 97,500,000	\$ 130,000,000	\$ 162,500,000
Total	\$ 2,241,544,957	\$ 2,519,354,147	\$ 2,748,724,013
2018-40 Total:	\$ 3,729,854,884	\$ 4,188,479,142	\$ 4,598,664,076

**City of Portland, Clackamas County, Multnomah County, and Washington County
Revenue Range Comparisons - CAPITAL REVENUES**



Agency	2018 Annual Local Revenues			RTP Time Period 1: 2018-2027		RTP Time Period 2: 2028-2040		2040 Population Shares	Possible Federal RFFA Funds -Step 2 Allocation Ranges					
	Annual Local Revenue Range			2018-2027 Revenue Range		2028-2040 Revenue Range			2018-2027 Time Period			2028-2040 Time Period		
	2018 Total Local Revenues	Annual Capital Percent	2018 Capital Amount	2018-2027 Local Revenues Total	2018-2027 Local Revenues for Capital Needs	2028-2040 Local Revenues Total	2028-2040 Revenues for Capital Needs		at 75%	At 100%	At 125%	at 75%	at 100%	at 125%
City of Portland	\$ 305,823,102	8.0%	\$ 24,465,848	\$ 3,058,231,020	\$ 244,658,482	\$ 3,975,700,326	\$ 318,056,026	40.67%	\$ 26,535,372	\$ 35,380,496	\$ 44,225,620	\$ 59,475,834	\$ 79,301,112	\$ 99,126,391
Clackamas County	\$ 79,412,688	25.0%	\$ 19,853,172	\$ 800,122,198	\$ 200,030,550	\$ 1,069,167,459	\$ 267,291,865	16.69%	\$ 10,891,005	\$ 14,521,340	\$ 18,151,675	\$ 24,410,873	\$ 32,547,831	\$ 40,684,789
Multnomah County	\$ 27,413,983	25.0%	\$ 6,853,496	\$ 274,139,830	\$ 68,534,958	\$ 356,381,779	\$ 89,095,445	9.10%	\$ 5,939,160	\$ 7,918,880	\$ 9,898,600	\$ 13,311,910	\$ 17,749,213	\$ 22,186,516
Washington County	\$ 152,262,711	25.0%	\$ 38,065,678	\$ 1,730,562,934	\$ 432,640,734	\$ 2,934,696,202	\$ 733,674,051	33.54%	\$ 21,884,463	\$ 29,179,284	\$ 36,474,105	\$ 49,051,382	\$ 65,401,843	\$ 81,752,304
				Of total local revenues	County = 25% Portland = 8%	Of total local revenues	County = 25% Portland = 8%	100.00%	\$ 65,250,000	\$ 87,000,000	\$ 108,750,000	\$ 146,250,000	\$ 195,000,000	\$ 243,750,000

Ranges are based on a population proportional share

Population Ratios			Federal Discretionary Grant Assumptions (Non Transit)			
Agency	2040 Population Estimate	% of Total Metro Area Population	Grant Program	2018-2027	2028-2040	Total
City of Portland	863,509	40.67%	ITS (On)	\$ 15,000,000	\$ 20,000,000	\$ 35,000,000
Clackamas County	354,413	16.69%	FAST Lne (On)	\$ 50,000,000	\$ 60,000,000	\$ 110,000,000
Multnomah County	193,271	9.10%	Freight (On)	\$ 20,000,000	\$ 25,000,000	\$ 45,000,000
Washington County	712,160	33.54%	Tiger (Off sys)	\$ 20,000,000	\$ 25,000,000	\$ 45,000,000
Totals	2,123,353	100.00%	Total:	\$ 105,000,000	\$ 130,000,000	\$ 235,000,000

Based on Exhibit A to PSU 2016 Population Forecast Tables and include ONLY Metro boundary areas
FAST Lane, Freight = on-system at 1 award per RTP period. Tiger & ITS off system at 2 per RTP period.

Agency	Possible State Allocation Ranges					
	State Allocations RTP Time Period 1: 2018-2027			State Allocations RTP Time Period 2: 20128-2040		
	at 75%	at 100%	at 125%	at 75%	at 100%	at 125%
City of Portland	\$ 39,461,537	\$ 52,615,382	\$ 65,769,228	\$ 49,296,549	\$ 65,728,732	\$ 82,160,914
Clackamas County	\$ 16,196,336	\$ 21,595,114	\$ 26,993,893	\$ 20,232,954	\$ 26,977,272	\$ 33,721,590
Multnomah County	\$ 8,832,300	\$ 11,776,400	\$ 14,720,500	\$ 11,033,577	\$ 14,711,436	\$ 18,389,295
Washington County	\$ 32,545,032	\$ 43,393,376	\$ 54,241,720	\$ 40,656,241	\$ 54,208,321	\$ 67,760,402
Totals:	\$ 97,035,205	\$ 129,380,273	\$ 161,725,341	\$ 121,219,321	\$ 161,625,761	\$ 202,032,201

State Funds	RTP Time Period 1: 2018-2027					RTP Time Period 2: 2028-2040				
	Mod-L	HBRR-L	Connect Oregon Bike and Ped	HSIP	2018-2027 Total	Mod-L	HBRR-L	Connect Oregon Bike and Ped	HSIP	2028-2040 Total
Totals:	\$ 23,294,173	\$ 60,564,850	\$ 14,540,000	\$ 30,981,250	\$ 129,380,273	\$ 26,984,941	\$ 70,160,848	\$ 28,590,000	\$ 35,889,972	\$ 161,625,761

RFFA Step 2 Metro Federal Funds	2018-2027	2028-2040	Total Metro RFFA Step 2 Funding
	CMAQ TA STBG	CMAQ TA STBG	
Totals:	\$ 87,000,000	\$ 195,000,000	\$ 282,000,000

Single year average of RFFA Step 2 calls at \$15,000,000/year during 2018-2027 time period w/ \$33m removed for 19-21 call
2028-2040 time period includes growth facto equaling an average of \$13 million per year.

Fund	2018-2027	2028-2040	Total
CMAQ	\$ 164,320,000	\$ 274,720,000	\$ 439,040,000
STBG	\$ 308,500,000	\$ 518,100,000	\$ 826,600,000
TA	\$ 16,060,000	\$ 26,791,000	\$ 42,851,000
Totals:	\$ 488,880,000	\$ 819,611,000	\$ 1,308,491,000

LRFA funding assumptions
<---

Program Area	RFFA Step 1 Summary			2019-21 RFFA Summary		
	2018-2027	2028-2040	Totals	Step	Amount	%
HCT				Step 1:	\$ 97,230,000	74.6%
RTO				Step 2:	\$ 33,150,000	25.4%
TSMO	\$ 401,880,000	\$ 624,611,000	\$ 1,026,491,000	Total:	\$ 130,380,000	100.0%
Planning						
Bond Payment						
	Step 1 %	82.2%	76.2%		\$ 1,026,491,000	
	Step 2 %	17.8%	23.8%		\$ 282,000,000	
	Total;	100.0%	100.0%		\$ 1,308,491,000	

Step 1: Regional Bond Commitments and Region-wide Program Investments	
Existing transit bond payments	\$48,000,000
New transit bond commitment	\$15,430,000
New project development bond commitment	\$3,780,000
Corridor and Systems Planning	\$1,660,000
Regional MPO Planning (in-lieu of dues)	\$3,960,000
Regional Travel Options (Incl. \$1.5M for Safe Routes to School, \$.25M for Climate Smart Strategies)	\$9,290,000
Transit Oriented Development	\$9,870,000
Transportation System Management and Operations/ITS (Incl. \$.25M for Climate Smart Strategies)	\$5,240,000
Total:	\$97,230,000

Step 2: Community Investment Fund			
Active Transportation/Complete Streets			
Project name	Applicant	Sub-region	Amount
Beaverton Creek Trail	THPRD	Washington	\$3,693,212
Brentwood-Darlington Safe Routes to School	City of Portland	Portland	\$2,200,000
To be determined*	City of Gresham	Multnomah	\$3,141,156
Cully Walking and Biking Parkway	City of Portland	Portland	\$2,200,000
Halsey Street Safety and Access to Transit	City of Portland	Portland	\$2,400,000
Herman Road Walking and Biking Improvements	City of Tualatin	Washington	\$625,000
Highway 43 Walking and Biking Improvements	City of West Linn	Clackamas	\$3,000,000
I-5 Walking and Biking Bridge	City of Wilsonville	Clackamas	\$1,550,000
Jade and Montavilla Connected Centers	City of Portland	Portland	\$3,200,000
Molalla Avenue Walking and Biking Improvements	City of Oregon City	Clackamas	\$3,800,632
Total:			\$25,810,000

Step 2: Community Investment Fund			
Regional Freight Initiatives			
Project name	Applicant	Sub-region	Amount
Basalt Creek Parkway Extension	Washington County	Washington	\$2,803,605
Central Eastside Access & Circulation Improvements	City of Portland	Portland	\$2,805,879
Hunziker Road Industrial Area	City of Tigard	Washington	\$1,790,516
Regional Freight Studies	Metro	Regional	To be determined
Total:			\$7,340,000

Total 2019-21 RFFA: \$130,380,000

**State Funding Assumptions - ODOT
Revenue Range Comparisons
Page 3**



ODOT Program Funding - Federal and State Funds										CAPITAL ONLY HFP, Mod, Rail & Misc	
RTP Period	OM&P	FLAP-L/FLAP-S	HFP	Mod-S	Rail Crossing	Misc.	Mod-State	SPR	Totals		
2018-2027	\$ 1,036,357,760	\$ -	\$ 31,214,192	\$ 23,294,173	\$ 6,755,310	\$ 6,988,252	\$ 122,760,292	\$ 23,239,492	\$ 1,250,609,471	2018-2027:	\$ 191,012,219
2028-2040	\$ 1,200,560,000	\$ -	\$ 36,159,821	\$ 26,984,941	\$ 7,825,633	\$ 8,095,482	\$ 142,210,000	\$ 26,921,597	\$ 1,448,757,474	2028-2040:	\$ 221,275,877
Total	\$ 2,236,917,760	\$ -	\$ 67,374,013	\$ 50,279,114	\$ 14,580,943	\$ 15,083,734	\$ 264,970,292	\$ 50,161,089	\$ 2,699,366,945	Total:	\$ 412,288,096

Assumptions and Notes	Operations Maintenance Paving Systems Preservation Fix-It Non-Capacity Enhancing On System	Assumed out of the MPO Boundary Area Federal Lands Access Program	On System Goods Movement Focused Highway Freight Program	On-System Capacity Enhancing Modernization State Enhance Federal	On or Off? OC/UCs Safety Rail/ Highway Crossings	Smaller programs grouped together Assumed Federal Miscellaneous	On-System State funds Committed to Modernization Needs Capacity Enhancing Modernization -State	State Planning & Research Funds	<p align="center">State Funding Assumptions</p> <ol style="list-style-type: none"> 1. A general assumption that 31% of the total state allocation would flow to Region 1. 2. 81% of the 31% would be committed and remain in the MPO boundary area. 3. Federal and State funds may be combined together in some programs 4. The "31% of 81%" for all funds logic is a guess and has not been validated. 5. OM&P accounts for approximately 82.9% of the identified ODOT Region 1 Revenues
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Projections of Revenues for Capital Needs			
Agency	Summary at 100% Levels		
	2017-2028	2028-2040	Total
Portland:	\$ 332,654,360	\$ 463,085,870	\$ 795,740,230
Clackamas County:	\$ 236,147,004	\$ 326,816,968	\$ 562,963,972
Multnomah County:	\$ 88,230,237	\$ 121,556,094	\$ 209,786,332
Washington County:	\$ 505,213,393	\$ 853,284,215	\$ 1,358,497,609
RFFA Step 1 (Metro):	\$ 301,410,000	\$ 468,458,250	\$ 769,868,250
ODOT Region 1:	\$ 276,012,219	\$ 326,275,877	\$ 602,288,096
Transit:	In development	In development	\$ -
Total:	\$ 1,739,667,214	\$ 2,559,477,274	\$ 4,299,144,488

Add Federal Discretionary Award column for ODOT Use Page 1 Fed Discretionary Amounts

RFFA Step 1 amounts reduced by 25% to remove various ongoing planning commitments
 Only includes HFP, Mod-S, Rail Crossing, Misc, and Mod-S funds. OM&P funds considered 100% all for maintenance needs.
 Transit projected revenues are still being developed

Added Note: The ODOT total also includes federal discretionary grant awards the region may receive (e.g. on-system FAST Lane, etc.)

Building the 2018 RTP Investment Strategy | Process and Timeline Overview

- Update the pipeline of regional investment priorities – including a 10-year investment strategy – to address regional challenges, reflect public priorities and maximize progress toward the region’s shared vision and goals for the future of transportation.
- Ensure that the project and program lists adopted in the 2018 RTP have undergone an outcomes-based evaluation that includes the opportunity for policymakers to adjust priorities based on the outcomes of the evaluation, public input, and funding.

2017

2018

1 Call For Projects

Spring/Summer 2017

- On-line public comment opportunity on priorities (*March*)
- Metro issues Call for Projects with funding levels and policy direction from JPACT and Council (*June 1*)
- Counties and cities work through coordinating committees (TACs and PACs) with Metro, ODOT, TriMet and SMART to identify draft priorities to submit to Metro
- Agencies seek endorsement of priorities from governing bodies (*prior to July 21, but no later than Aug. 3*)
- Agencies submit project priorities on-line to Metro (*by July 21*)

2 Evaluate Strategy

Summer/Fall 2017

- Metro compiles draft lists and evaluates performance (*July – Oct.*)
- Metro convenes regional work group to review submittals for completeness and discuss project evaluation scoring (*August*)
- Metro prepares draft key findings for technical review (*Oct. – Nov.*)
- TPAC, MTAC, RTP work groups and county coordinating committee TACs review and discuss draft findings in preparation for policy committee and Regional Leadership Forum 4 discussions (*Nov. – Dec.*)

3 Refine Strategy

Winter/Spring 2018

- On-line public comment opportunity on draft projects and key findings (*Jan.*)
- Regional Leadership Forum 4 (*Feb.*)
 - discuss key findings, public input, and funding
 - provide direction on investment strategy refinements
- Counties and cities work through coordinating committees (TACs and PACs) with Metro, ODOT, TriMet and SMART to identify investment strategy refinements to submit to Metro (*Feb. – April*)
- Agencies submit project updates (*by April 29*)
- Metro evaluates updated priorities (*May*)

4 Adoption Process

Summer/Fall 2018

- Metro reflects updated priorities and analysis in discussion draft RTP (*June*)
- JPACT and Council release discussion draft 2018 RTP and components for public review and direct staff to prepare findings and adoption legislation (*June*)
- 45-day public comment period (*June 29 to Aug. 13*)
 - 2018 RTP, including investment strategy
 - Regional Transportation Safety Strategy
 - Regional Transit Strategy
 - Regional Freight Strategy
- Metro Council and regional committees consider public comment prior to action (*Sept. – Dec.*)

See reverse for summary of key dates and milestones

Building the 2018 RTP Investment Strategy | Key Dates and Milestones (subject to refinement)

2017

June 1	Initial RTP Call for Projects requests updated investment priorities subject to further evaluation and refinement
June - July	Cities and counties work through coordinating committees (TACs and PACs) with ODOT, TriMet and SMART to discuss findings, public input, and funding to identify investment strategy refinements to submit to Metro
July 21	Agencies submit draft priorities to Metro with endorsements (note: endorsements must be submitted no later than Aug. 4)
July 24 – Oct. 16	RTP evaluation - system evaluation, transportation equity analysis (including a draft Title VI disparate impact analysis), and project evaluation
Nov.	Draft RTP evaluation key findings, draft RTP and draft topical/modal plans* released for technical review
Nov. – Dec.	Technical review of draft key findings, draft RTP and draft topical/modal plans by TPAC, MTAC, RTP work groups and coordinating committee TACs

2018

Jan.	On-line comment opportunity on key findings, draft investment strategy and draft topical/modal plans
Feb.	Regional Leadership Forum 4 to discuss key findings, public input, and updated funding information
Feb. to April	Cities and counties work through coordinating committees (TACs and PACs) with ODOT, TriMet and SMART to discuss findings, public input, and funding to identify investment strategy refinements to submit to Metro
April 29	Agencies submit final project list updates to Metro for analysis (including a final Title VI disparate impact analysis and system evaluation)
May - June	Metro evaluates updated priorities and compiles final draft plan for public review
June	JPACT and the Metro Council release draft plan and components for public review and direct staff to prepare findings and adoption legislation
June 28 – Aug. 13	45-day public comment period and hearing (July 19)
Sept. 19	MTAC recommendation to MPAC
Sept. 28	TPAC recommendation to JPACT
Oct. 9	Council work session on technical committee recommendations
Oct. 10	MPAC recommendation to Council
Oct. 18	JPACT recommendation to Council
Nov. 13	Council work session on policy committee recommendations
Dec. 6	Council holds final hearing and considers final action on MPAC and JPACT recommendations

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: March 24, 2017
To: TPAC and interested parties
From: Kim Ellis, RTP Project Manager
Subject: Update on 2018 Regional Transportation Plan Call for Projects and draft Vision Statement

PURPOSE

This memo provides an update on the process and timeline for building the 2018 Regional Transportation Plan (RTP) Investment Strategy and seeks feedback on the process and an updated draft vision statement for the future of transportation in the Portland metropolitan region.

Pending direction from the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council, on June 1, 2017 Metro will issue a “call for projects” to update the region’s near- and long-term transportation investment priorities to support regional policies and goals for safety, congestion relief, community livability, the economy, equity, and the environment. More detailed instructions for submissions, supporting forms, and on-line resources are in development for agencies to use. The deadline for submission of projects will be July 21, 2017.

ACTION REQUESTED

No action is requested at this meeting. At the March 31 meeting, TPAC is requested to discuss the following questions to help staff prepare guidance and other materials to support the Call for Projects and building the 2018 RTP Investment Strategy:

1. Do you have comments for staff on the draft vision statement?
2. Do you have comments for staff about the timeline and process for updating and evaluating the region’s near- and long-term investment priorities?
3. What additional information do you need to make your recommendation to JPACT?

The discussion will help shape recommendations for the Metro Council, the Metro Policy Advisory Committee (MPAC), and the Joint Policy Advisory Committee on Transportation (JPACT) to consider in April and May as part of their broader direction on building the 2018 RTP Investment Strategy.

At the April 28 meeting, TPAC will be requested to make a recommendation to JPACT on moving forward with building the draft RTP Investment Strategy. The recommendation will include two parts:

1. Updated vision and 2018 RTP policy framework to guide building the draft RTP Investment Strategy for further review and refinement; and
2. Updated RTP evaluation framework that includes updated system performance and transportation equity measures and project criteria identified for testing through the analysis. The evaluation framework will be subject to further refinement based on the analysis.

THE OPPORTUNITY

Regional context

Past actions and policy direction

Much has changed in the region since the adoption of the Regional Transportation Plan (RTP) and Regional Active Transportation Plan (ATP) in 2014. Since the adoption of the 2014 RTP and ATP, several projects have been completed (e.g., Sellwood Bridge, Portland-Milwaukie Light Rail, Sunrise Project (Phase 1, Unit 1). In addition, TriMet completed plans for expanding local and regional transit service, and the Metro Council and JPACT adopted an ambitious strategy – called the Climate Smart Strategy – for reducing greenhouse gas emissions that necessitates a significant expansion of transit service.

The upcoming RTP Call for Projects (which will result in updates to the projects and programs in the RTP) is an opportunity to follow through on those plans and actions and more recent regional policy commitments adopted by JPACT and the Metro Council. These commitments include the more recent Regional Flexible Funds allocation decision to advance three priority bottleneck projects (I-5/Rose Quarter, OR 217, and I-205 widening – Ph. 1: I-205/Abernethy Bridge and Ph. 2: I-205 mainline), two priority transit projects (the Southwest Corridor and Division Transit projects), and active transportation project development work to accelerate construction of active transportation projects in the region. These priorities were reaffirmed by JPACT and the Metro Council through adoption of the region’s 2017 Regional Policy and Funding Priorities for State Transportation Legislation on February 16 and March 2, respectively.

2018 RTP Policy Framework

In addition, staff have compiled a 2018 RTP Policy Framework in **Attachment 1** that will further guide the Call for Projects and building the 2018 RTP Investment Strategy. Key elements of the policy framework are:

- An updated vision for the region’s transportation system that reflects community values, regional challenges, and desired land use, economic, equity and environmental outcomes;
- eleven supporting goals and objectives; and
- a network vision and supporting policies that, along with the regional mobility corridor policy framework, guide planning and investment in each part of the regional transportation system to provide a seamless and fully interconnected system.¹

The draft vision statement reviewed at Regional Leadership Forum 3 has been updated to guide the call for projects. On December 2, Regional Leadership Forum 3 participants reviewed and provided feedback on a draft vision statement for the region’s transportation future. The draft statement was developed reflecting values expressed during Regional Leadership Forums 1 and 2 discussions and additional engagement activities in 2015. The goals, objectives, network visions

¹ Reflecting the network vision for each part of the system, the RTP System Maps designates facilities that are part of the regional transportation system based on the function they serve and where they are located. The 2014 RTP regional system maps are included in Attachment 2 for reference and can be viewed on-line at: gis.oregonmetro.gov/rtp/.

and supporting policies, and regional mobility corridor policy framework are from the adopted 2014 Regional Transportation Plan.

Together this policy framework defines the outcomes the 2018 RTP (and RTP Investment Strategy) is trying to achieve by 2040.

Our shared vision for the future of transportation

The statement below reflects an updated vision for the region’s transportation system, incorporating refinements recommended by the Metro Technical Advisory Committee (MTAC) on March 15 in ~~strike through~~ and underline:

In the 21st century, all residents and businesses of the Portland metropolitan region share in a prosperous and equitable economy and exceptional quality of life built on a foundation of safe, reliable, healthy, and affordable travel options.

Together our investments support local and regional land use plans and build a transportation system that is well-maintained, designed to be accessible for all ages, abilities and modes of travel, employs the best technologies, and manages both demand and capacity to safeguard our climate and the environment, efficiently move our products to market, and connect everyone to the education, services and work opportunities of today and the future. The system is fiscally sustainable, prepared for natural disasters, and joins rail, aviation, marine, highway, major streets, bus, air, water, biking, and walking facilities and services into a seamless and fully interconnected system.



Graphic recording of Dec. 2 Regional Leadership Forum 3 feedback.

Collectively, the JPACT and Metro Council actions and the 2018 RTP policy framework (including this updated vision statement and existing RTP goals and policies) and public input on near-term investment priorities will serve as a starting point for identifying investment priorities to be included in the draft 2018 RTP Investment Strategy.

Federal and State context

Additionally, the federal government completed rulemaking to implement two federal transportation bills with a new emphasis on outcomes, system performance, and transparency and accountability in the transportation decision-making process. In 2016, a Governor-appointed task force work conducted a series of forums to identify statewide transportation priorities. In 2017, the State of Oregon is likely to unveil a new transportation funding bill that would set state investment priorities for the next several years.

Nonetheless, federal and state funding is on the decline while the need for transportation investments in the Portland region continues to grow. The adopted 2014 RTP includes more than 1,250 projects, with a total estimated cost of \$36 billion, including maintenance and operations of

the transportation system. That cost is significantly more than our region's current spending on transportation investments, the majority of which is being spent on maintenance and operations.

In the past, a generous federal match, significant state funding, and more flexibility at the local level meant that the financing for previous projects was more straightforward. Conditions have changed and future investments will likely require voter approval. This requires the region to take a different approach to identifying investment priorities, communicating about them, and bringing them forward in a transparent manner focused on explaining to stakeholders and the public the benefits they can expect from a project as well as the overall 2018 RTP Investment Strategy, whether it will individually benefit from them or not.

BUILDING THE 2018 RTP INVESTMENT STRATEGY

Call for Projects to build a draft investment strategy

The changing landscape of transportation funding and policy highlights the need for the region to review its priorities, be strategic, and make refinements to near and long-term investments identified to address regional transportation challenges. To this end, the 2018 RTP Call for Projects provides an opportunity to develop an updated strategy for how the region will leverage local, regional, state, federal funds to advance local, regional and state priorities as part of an existing public process. In effect, the region will work together to define a pipeline of regional transportation projects to fund and construct to address regional challenges, reflect public priorities and maximize progress toward the region's shared vision and goals for the further of transportation.

Consistent with the adopted work plan, two levels of investment will be assumed for the 2018 RTP Investment Strategy. The first level, the *Constrained Priorities* (also known as the Financially Constrained project list under federal law), will represent the highest priority transportation investments for the plan period (2018-2040). In order for projects to be eligible to receive federal and state funding, they must be on the *Constrained Priorities* project list. The second level, the *Additional Priorities*, will represent other priority investments that the region agrees to work together to fund and construct.

The 2018 RTP Investment Strategy will be comprised of the *Constrained Priorities* project list and the *Additional Priorities* project list.

The purpose of the upcoming "call for projects" is three-fold:

1. **Develop a pipeline of priority projects on the regional transportation system** that are needed to support the 2040 Growth Concept vision, and regional transportation goals, and will need some combination of local, regional, state, and/or federal funding to be constructed.
2. Provide an opportunity for regional partners to identify priorities for the regional transportation system and refinements needed to **update current Constrained priorities (adopted as the 2014 RTP Financially Constrained System in 2014)** to respond to local, regional and state needs on the regional system as well as planning efforts completed since July 2014 and more recent JPACT and Council policy direction.

3. Provide an opportunity for regional partners to **identify additional priorities to include in the 2018 RTP Investment Strategy** that the region agrees to work together to fund and construct to address to local, regional and state needs on the regional system.

Updated draft information on the 2018 Call for Projects is provided in **Attachment 3**. The information will continue to be refined and is provided to assist project sponsors as they prepare for the 2018 RTP Call For Projects. Pending direction from JPACT and the Metro Council, the Call for Projects will occur from June 1 to July 21, 2017.

Evaluating the draft RTP Investment Strategy

The RTP investment strategy analysis is intended to provide policymakers with better information about the region’s investment priorities and the implications of our near-term and long-term transportation investment choices. The evaluation process will test proposed system performance and transportation equity measures and project criteria to determine which measures can best evaluate whether the transportation system is successful in meeting regional goals and policies. Two rounds of evaluation are planned, allowing for refinement of the draft system performance and transportation equity analysis measures and draft project evaluation criteria to address any shortcomings identified during the Round 1 evaluation.

The Round 1 analysis will be conducted on:

2015 Base Year 2040 No Build	RTP Investment Strategy Packages
	Package 1 - 10-year Constrained RTP investment Strategy <i>Region’s highest priority projects given our current funding outlook (2018-2027 in Constrained project list)</i>
	Package 2 - Full Constrained RTP Investment Strategy <i>Package 1 + high priority projects given our current funding outlook (2028-2040 in Constrained project list)</i>
	Package 3 - Full RTP Investment Strategy <i>Full Constrained RTP + additional priority projects the region agrees to work together to pursue funding to plan and build (2028-2040 in Strategic project list)</i>

The results of the first round of analysis and public input will inform Council, JPACT and MPAC recommendations to guide further refinement and evaluation of the RTP Investment Strategy in 2018.

NEXT STEPS

Metro staff will complete technical work to support the solicitation process and continue working with TPAC and MTAC on policy-related elements of the update that will inform the project solicitation process. Remaining technical work to support building the RTP Investment Strategy include:

1. **Update financially constrained revenue forecast** to reflect a realistic outlook of the amount of local, state and federal transportation funding that is expected to be available

from 2018 to 2040. The forecast will help illustrate the region’s transportation current funding outlook and support regional discussions to identify potential funding tools and build broad support for more funding and the region’s investment priorities. Staff will present the draft constrained revenue forecast at the March 31 TPAC meeting.

2. **Development of on-line application system** that includes resources and tools to support project sponsors.
3. **Update the 2014 RTP project and program database** to remove projects completed or constructed since 2014.

Policy-related elements being developed for review and discussion by the Metro Council, MPAC and JPACT in April and May to support the Call for Projects:

1. **Update Vision.** An updated vision statement for the RTP that reflects feedback from the Dec. 2 Regional Leadership Forum is presented in this memo for review and feedback on March 31.
2. **Updated Outcomes-based Evaluation Framework.** New and updated system performance and transportation equity analysis measures have been identified for testing during modeling and analysis of the draft 2018 RTP Investment Strategy. The measures will evaluate performance of the strategy as a whole. In response to Council direction, staff have proposed piloting project evaluation during the Call for Projects to complement the planned system performance evaluation and transportation equity analysis recommended for testing.

TPAC has already reviewed the draft system performance and transportation equity measures and expressed general support for testing the measures during the evaluation, with the understanding further refinements would be possible. In addition TPAC, provided initial feedback on the project evaluation approach and draft criteria at the February meeting and during the joint TPAC/MTAC workshop held on March 17. Staff will present several project evaluation approach options at the March 31 TPAC meeting, as requested at the workshop.

3. **Updates on the Regional Transit Strategy and the Regional Safety Strategy and Regional Freight Strategy.** The strategies will continue to be developed through 2017.
4. **2018 RTP Investment Strategy Funding Level.** Possible approaches for setting the overall funding level for 2018 RTP Investment Strategy and identifying regional priorities to be recommended in the draft “Additional Priorities” list. Staff will present an overview of these approaches at the March 31 TPAC meeting and seek direction from the JPACT subcommittee, JPACT and the Metro Council in April and May, prior to issuing the Call for Projects.

The schedule of next steps follows.

Schedule for regional discussion of Building the RTP Investment Strategy	
March 2017	<ul style="list-style-type: none">• Technical Workshop #1 with RTP work groups, TPAC and MTAC on system evaluation and project evaluation criteria (3/17/17; 1 to 4 PM at Metro in the council chamber)• TPAC and MTAC discussions on vision, project evaluation criteria and

Schedule for regional discussion of Building the RTP Investment Strategy	
	<p>process for building the 2018 RTP Investment Strategy</p> <ul style="list-style-type: none"> • Coordinating Committee briefings (TACs)
April 2017	<ul style="list-style-type: none"> • Technical Workshop #2 with RTP work groups, TPAC and MTAC on Call for Projects (4/14/17; 10 AM to Noon at Metro in the council chamber) • Coordinating Committee briefings (TACs) • JPACT, MPAC and Metro Council discussions • TPAC recommendation to JPACT (April 28)
May 2017	<ul style="list-style-type: none"> • MTAC recommendations to MPAC (May 5) • Coordinating Committee briefings (Policy and TACs) • MPAC and JPACT recommendations to Council • Metro Council action
June 1, 2017	<ul style="list-style-type: none"> • RTP Call for Projects issued • On-line resources will be available at: www.oregonmetro.gov/2018PROJECTS
June-July 2017	<ul style="list-style-type: none"> • Cities and counties work with Metro, ODOT, Port, TriMet, and SMART through technical and policy coordinating committees to identify projects to submit • All submitting agencies pilot using draft project criteria for top 5 projects to test criteria and provide information to sponsoring agencies, regional decision-makers, and the public to communicate the potential return-on-investment of individual projects • Agencies seek endorsement of projects from governing bodies
July 21, 2017	<ul style="list-style-type: none"> • Project submittals due to Metro
Aug. 25, 2017	<ul style="list-style-type: none"> • Endorsement of projects from governing bodies due to Metro
August 2017	<ul style="list-style-type: none"> • Metro reviews submittals for completeness and compiles draft project lists and criteria with TPAC and MTAC
July to Oct. 2017	<ul style="list-style-type: none"> • RTP technical evaluation process (Round 1)
Summer-Fall 2017	<ul style="list-style-type: none"> • Metro evaluates draft strategy and prepares draft regional-level findings on system performance and transportation equity analysis and identifies any shortcomings of measures and project criteria
Nov. – Dec. 2017	<ul style="list-style-type: none"> • Draft RTP Findings & Recommendations Report is released for technical review and discussion by TPAC, MTAC, RTP work groups and technical coordinating committees to discuss findings and deficiencies, and recommend changes, if any, that are needed. The technical discussions will inform materials being prepared for discussion by the Metro Council and regional policy advisory committees, and at the Regional Leadership Forum 4 (moved to February 2018). • Metro provides corridor-level and other technical evaluation information to agencies and coordinating committees to use to inform potential refinements to projects in Spring 2018 • Coordinating committees prepare to refine project lists in Spring 2018 in response to the system evaluation, transportation equity analysis, project evaluation and public input

Schedule for regional discussion of Building the RTP Investment Strategy	
	<ul style="list-style-type: none"> • Metro releases technical review drafts of Safety, Freight and Transit plans for TPAC and MTAC review
Jan. to Feb. 2018	<ul style="list-style-type: none"> • On-line public comment opportunity on draft projects and key findings • Metro convenes RTP work groups to recommend refinements to system performance and transportation equity measures and project evaluation criteria for future use • Regional Leadership Forum 4 (<i>Feb.</i>) <ol style="list-style-type: none"> a. Discuss regional findings and deficiencies, project information and public input on draft projects lists b. Discuss updated funding information c. Provide direction on refining investment priorities (e.g., timing and/or constrained/strategic list) and updated evaluation measures and project criteria
Feb. – April 2018	<ul style="list-style-type: none"> • Cities and counties work with Metro, ODOT, Port, TriMet and SMART through technical and policy coordinating committees to identify investment strategy refinements, if needed or desired
April 29, 2018	<ul style="list-style-type: none"> • Agencies submit updated projects on-line to Metro by April 29; all project submittals include responses to updated project criteria
May – June 2018	<ul style="list-style-type: none"> • RTP technical evaluation process (Round 2) • Metro compiles refined draft project lists and reviews project submittals with TPAC and MTAC • Metro evaluates refined draft project lists and updates regional-level findings on system performance and transportation equity analysis • Metro reviews updated findings with TPAC and MTAC to frame tradeoffs and choices to highlight to the Metro Council, JPACT and MPAC
June 2018	<ul style="list-style-type: none"> • Metro Council and JPACT recommend which draft project list (Round 1 or Round 2 or Hybrid) to be released during 45-day public comment period
June 29 to Aug. 13, 2018	<ul style="list-style-type: none"> • Release public review draft RTP, Regional Framework Plan and Functional Plan amendments (if needed), and public review draft modal/topic plans for 45-day comment period & hearing
Sept. 2018	<ul style="list-style-type: none"> • MTAC and TPAC consider public comment and make recommendations to MPAC and JPACT on 2018 RTP and modal/topical plans
Oct. 2018	<ul style="list-style-type: none"> • MPAC and JPACT consider public comment and make recommendations to Council on 2018 RTP and modal/topical plans
Dec. 2018	<ul style="list-style-type: none"> • Council action on 2018 RTP and Regional Transit Strategy, updated Regional Freight Plan, and updated Regional Safety Plan
Early 2019	<ul style="list-style-type: none"> • Submit 2018 RTP to US DOT and LCDC for federal and state review

/Attachments

1. 2018 RTP Policy Framework (3/24/17)
2. Draft Information on 2018 Call for Projects and Programs (3/20/17)



Summary of 2018 Regional Transportation Plan Policy Framework

Overview and purpose

The Regional Transportation Plan establishes a policy framework that guides transportation planning and investment decisions in the region, including identifying, evaluating and prioritizing project and program investments to be included in the plan.

This document summarizes the adopted Regional Transportation Plan policy framework (last amended in December 2014). Key elements of the policy framework are:

- a vision for the region's transportation system that reflects community values, regional challenges, and desired land use, economic, equity and environmental outcomes;
- eleven supporting goals and objectives; and
- a network vision and supporting policies that along with the regional mobility corridor framework guide planning and investment in each part of the regional transportation system to provide a seamless and fully interconnected system.¹

Together these key elements define the outcomes the plan is trying to achieve by 2040.

Our shared vision for the future of transportation

This statement reflects an updated vision for the region's transportation system:

In the 21st century, all residents and businesses of the Portland metropolitan region share in a prosperous and equitable economy and exceptional quality of life built on a foundation of safe, reliable, healthy, and affordable travel options.

Together our investments support local and regional land use plans and build a transportation system that is well-maintained, designed to be accessible for all ages, abilities and modes of travel, employs the best technologies, and manages both demand and capacity to safeguard our climate and the environment, efficiently move our products to market, and connect everyone to the education, services and work opportunities of today and the future. The system is fiscally sustainable, prepared for natural disasters, and joins rail, aviation, marine highway, major street, bus, air, water, biking, and walking services and facilities into a seamless and fully interconnected system.

The vision statement was updated to reflect the values and desired outcomes expressed by the public, electeds and community and business leaders engaged in the 2018 Regional Transportation Plan update in 2015 and 2016.

¹ Reflecting the network vision for each part of the system, the RTP System Maps designates facilities that are part of the regional transportation system based on the function they serve and where they are located. The 2014 RTP regional system maps are included in Attachment 2 for reference and can be viewed on-line at: gis.oregonmetro.gov/rtp/.

Regional goals and objectives for transportation²

Our shared vision for the future of transportation is further described through eleven goals and related objectives. The goals are broad statements that describe a desired outcome or end result toward which efforts are focused. The goals and supporting objectives provide a basis for evaluating investments to inform priorities and track progress toward achieving the outcomes expressed in the RTP vision.

GOAL 1: Foster Vibrant Communities and Efficient Urban Form

Land use and transportation decisions are linked to optimize public investments, reduce greenhouse gas emissions and support active transportation options and jobs, schools, shopping, services, recreational opportunities and housing proximity.

- **Objective 1.1 Compact Urban Form and Design** - Use transportation investments to focus growth in and provide multi-modal access to 2040 Target Areas and ensure that development in 2040 Target Areas is consistent with and supports the transportation investments.
- **Objective 1.2 Parking Management** – Minimize the amount and promote the efficient use of land dedicated to vehicle parking.
- **Objective 1.3 Affordable Housing** – Support the preservation and production of affordable housing in the region.

GOAL 2: Sustain Economic Competitiveness and Prosperity

Multi-modal transportation infrastructure and services support the region’s well-being and a diverse, innovative, sustainable and growing regional and state economy.

- **Objective 2.1 Reliable and Efficient Travel and Market Area Access** - Provide for reliable and efficient multi-modal local, regional, interstate and intrastate travel and market area access through a seamless and well-connected system of throughways, arterial streets, freight services, transit services and bicycle and pedestrian facilities.
- **Objective 2.2 Regional Passenger Connectivity** – Ensure reliable and efficient connections between passenger intermodal facilities and destinations in and beyond the region to improve non-auto access to and from the region and promote the region’s function as a gateway for tourism.
- **Objective 2.3 Metropolitan Mobility** - Maintain sufficient total person-trip and freight capacity among the various modes operating in the Regional Mobility Corridors to allow reasonable and reliable travel times through those corridors.
- **Objective 2.4 Freight Reliability** –Maintain reasonable and reliable travel times and access through the region, as well as between freight intermodal facilities and destinations within and beyond the region, to promote the region’s function as a gateway for commerce.
- **Objective 2.5 Job Retention and Creation** – Attract new businesses and family-wage jobs and retain those that are already located in the region.

GOAL 3: Expand Transportation Choices

Multi-modal transportation infrastructure and services provide all residents of the region with affordable and equitable options for accessing housing, jobs, services, shopping, educational, cultural and recreational opportunities, and facilitate competitive choices for goods movement for all businesses in the region.

- **Objective 3.1 Travel Choices** - Achieve modal targets for increased walking, bicycling, use of transit and shared ride and reduced reliance on the automobile and drive alone trips.
- **Objective 3.2 Vehicle Miles of Travel** - Reduce vehicle miles traveled per capita.
- **Objective 3.3 Equitable Access and Barrier Free Transportation** - Provide affordable and equitable access to travel choices and serve the needs of all people and businesses, including people with low income, youth, older adults and people with disabilities, to connect with jobs, education, services, recreation, social and cultural activities.

² First adopted in 2010 and amended in 2014 to reflect the Regional Active Transportation Plan and Climate Smart Strategy.

- **Objective 3.4 Shipping Choices** – Support multi-modal freight transportation system that includes air cargo, pipeline, trucking, rail, and marine services to facilitate competitive choices for goods movement for businesses in the region.

GOAL 4: Emphasize Effective and Efficient Management of the Transportation System

Existing and future multi-modal transportation infrastructure and services are well-managed to optimize capacity, improve travel conditions for all users and address air quality and greenhouse gas emissions reduction goals.

- **Objective 4.1 Traffic Management** – Apply technology solutions to actively manage the transportation system.
- **Objective 4.2 Traveler Information** – Provide comprehensive real-time traveler information to people and businesses in the region.
- **Objective 4.3 Incident Management** – Improve traffic incident detection and clearance times on the region’s transit, arterial and throughways networks.
- **Objective 4.4 Demand Management** – Implement services, incentives and supportive infrastructure to increase telecommuting, walking, biking, taking transit, and carpooling, and shift travel to off-peak periods.
- **Objective 4.5 Value Pricing** – Consider a wide range of value pricing strategies and techniques as a management tool, including but not limited to parking management to encourage walking, biking and transit ridership and selectively promote short-term and long-term strategies as appropriate.

GOAL 5: Enhance Safety and Security

Multi-modal transportation infrastructure and services are safe and secure for the public and goods movement.

- **Objective 5.1 Operational and Public Safety** - Reduce fatal and severe injuries and crashes for all modes of travel.
- **Objective 5.2 Crime** - Reduce vulnerability of the public, goods movement and critical transportation infrastructure to crime.
- **Objective 5.3 Terrorism, Natural Disasters and Hazardous Material Incidents** - Reduce vulnerability of the public, goods movement and critical transportation infrastructure to acts of terrorism, natural disasters, climate change, hazardous material spills or other hazardous incidents.

GOAL 6: Promote Environmental Stewardship

Promote responsible stewardship of the region’s natural, community, and cultural resources.

- **Objective 6.1 Natural Environment** – Avoid or minimize undesirable impacts on fish and wildlife habitat conservation areas, wildlife corridors, significant flora and open spaces.
- **Objective 6.2 Clean Air** – Reduce transportation-related vehicle emissions to improve air quality so that as growth occurs, the view of the Cascades and the Coast Range from within the region are maintained.
- **Objective 6.3 Water Quality and Quantity** – Protect the region’s water quality and natural stream flows.
- **Objective 6.4 Energy and Land Consumption** - Reduce transportation-related energy and land consumption and the region’s dependence on unstable energy sources.
- **Objective 6.5 Climate Change** – Reduce transportation-related greenhouse gas emissions and meet adopted targets for reducing greenhouse gas emissions from light vehicle travel.

GOAL 7: Enhance Human Health

Multi-modal transportation infrastructure and services provide safe, comfortable and convenient options that support active living and physical activity, and minimize transportation-related pollution that negatively impacts human health.

- **Objective 7.1 Active Living** – Provide safe, comfortable and convenient transportation options that support active living and physical activity to meet daily needs and access services.
- **Objective 7.2 Pollution Impacts** – Minimize noise, impervious surface and other transportation-related pollution impacts on residents in the region to reduce negative health effects.

Goal 8: Demonstrate Leadership on Reducing Greenhouse Gas Emissions

It is the policy of the Metro Council to implement the regional strategy to meet adopted targets for reducing greenhouse gas emissions from light-duty vehicle travel while creating healthy and equitable communities and a strong economy.

- **Objective 8.1 Land Use and Transportation Integration** - Continue to implement the 2040 Growth Concept to support a compact urban form to reduce vehicle miles traveled and increase the use of transit and zero or low carbon emission travel options, such as bicycling, walking, and electric vehicles.
- **Objective 8.2 Clean Fuels and Clean Vehicles** - Support state efforts to transition Oregon to cleaner, low carbon fuels and increase the use of more fuel-efficient vehicles, including electric and alternative fuel vehicles.
- **Objective 8.3 Regional and Community Transit Network and Access** - Make transit convenient, frequent, accessible and affordable by investing in new community and regional transit connections, expanding and improving existing transit services, improving bicycle and pedestrian access to transit, and implementing reduced fare programs for transit-dependent communities, such as youth, older adults, people with disabilities and people with low income.
- **Objective 8.4 Active Transportation Network** - Make biking and walking the safest, most convenient and enjoyable transportation choices for short trips for all ages and abilities by completing gaps and addressing deficiencies in the region's bicycle and pedestrian networks.
- **Objective 8.5 Transportation Systems Management and Operations** - Enhance fuel efficiency and system investments and reduce emissions by using technology to actively manage and fully optimize the transportation system.
- **Objective 8.6 Transportation Demand Management** - Implement programs, services and other tools that provide commuters and households with information and incentives to expand the use of travel options, including carsharing, and reduce drive alone trips.
- **Objective 8.7 Parking Management** - Implement locally-defined approaches to parking management in Centers, Corridors, Station Communities and Main Streets served by frequent transit service and active transportation options to make efficient use of vehicle parking and land dedicated to parking.
- **Objective 8.8 Streets and Highways Network** - Invest strategically in streets and highways to make them safe, reliable and connected to support the movement of people and goods.
- **Objective 8.9 Metro Actions** - Take actions to implement the regional strategy to meet adopted targets for reducing greenhouse gas emissions from light-duty vehicle travel.
- **Objective 8.10 Partner Actions** - Encourage local, state and federal governments and special districts to consider implementing actions in the Toolbox of Possible Actions in locally tailored ways to help the region meet adopted targets for reducing greenhouse gas emissions from light-duty vehicle travel

GOAL 9: Ensure Equity

The benefits and adverse impacts of regional transportation planning, programs and investment decisions are equitably distributed among population demographics and geography, considering different parts of the region and census block groups with different incomes, races and ethnicities.

- **Objective 8.1 Environmental Justice** – Ensure benefits and impacts of investments are equitably distributed by population demographics and geography.
- **Objective 8.2 Coordinated Human Services Transportation Needs** - Ensure investments in the transportation system provide a full range of affordable options for people with low income, elders and people with disabilities consistent with the Tri-County Coordinated Human Services Transportation Plan (CHSTP).
- **Objective 8.3 Housing Diversity** - Use transportation investments to achieve greater diversity of housing opportunities by linking investments to measures taken by the local governments to increase housing diversity.
- **Objective 8.4 Transportation and Housing Costs**– Reduce the share of households in the region spending more than 50 percent of household income on housing and transportation combined.

GOAL 10: Ensure Fiscal Stewardship

Regional transportation planning and investment decisions ensure the best return on public investments in infrastructure and programs and are guided by data and analyses.

- **Objective 9.1 Asset Management**– Adequately update, repair and maintain transportation facilities and services to preserve their function, maintain their useful life and eliminate maintenance backlogs.
- **Objective 9.2 Maximize Return on Public Investment** - Make transportation investment decisions that use public resources effectively and efficiently, using a performance-based planning approach supported by data and analyses that include all transportation modes.
- **Objective 9.3 Stable and Innovative Funding** – Stabilize existing transportation revenue while securing new and innovative long-term sources of funding adequate to build, operate and maintain the regional transportation system for all modes of travel at the federal, state, regional and local level.

GOAL 11: Deliver Accountability

The region’s government, business, institutional and community leaders work together in an open and transparent manner so the public has meaningful opportunities for input on transportation decisions and experiences an integrated, comprehensive system of transportation facilities and services that bridge governance, institutional and fiscal barriers.

- **Objective 10.1 Meaningful Input Opportunities** - Provide meaningful input opportunities for interested and affected stakeholders, including people who have traditionally been underrepresented, resource agencies, business, institutional and community stakeholders, and local, regional and state jurisdictions that own and operate the region’s transportation system in plan development and review.
- **Objective 10.2 Coordination and Cooperation** - Ensure representation in regional transportation decision-making is equitable from among all affected jurisdictions and stakeholders and improve coordination and cooperation among the public and private owners and operators of the region’s transportation system so the system can function in a coordinated manner and better provide for state and regional transportation needs.

Vision for each part of the regional transportation system

The RTP also defines a vision (as reflected in the network map) and supporting policies to guide investments in each part of the regional transportation system (shown in Attachment 1):

Arterial and Throughway Network Map Vision	<ul style="list-style-type: none"> • Build a well-connected network of complete streets that prioritize safe and convenient pedestrian and bicycle access. • Improve local and collector street connectivity. • Maximize system operations by implementing management strategies prior to building new motor vehicle capacity, where appropriate.
Regional Transit Network Map Vision³	<ul style="list-style-type: none"> • Build the total network and transit-supportive land uses to leverage investments. • Expand high capacity transit. • Expand regional and local frequent service transit. • Improve local service transit. • Support expanded commuter rail and intercity transit service to neighboring communities • Improve pedestrian and bicycle access to transit.
Regional Freight Network Map Vision⁴	<ul style="list-style-type: none"> • Use a systems approach to plan for and manage the freight network. • Reduce delay and increase reliability. • Protect industrial lands and freight transportation investments. • Look beyond the roadway network to address critical marine and rail needs. • Pursue clean, green and smart technologies and practices.
Regional Bicycle Network Map Vision	<ul style="list-style-type: none"> • Make walking and bicycling the most convenient, safe and enjoyable transportation choices for short trips less than three miles. • Build an interconnected regional network of bicycle routes and districts integrated with transit and nature that prioritizes seamless, safe, convenient and comfortable access to urban centers and essential daily needs, including schools and jobs, for all ages and abilities. • Build a green ribbon of bicycle parkways as part of the region’s integrated mobility strategy. • Improve bike-transit connections. • Ensure that the regional bicycle and pedestrian network equitably serves all people.
Regional Pedestrian Network Map Vision	<ul style="list-style-type: none"> • Make walking and bicycling the most convenient, safe and enjoyable transportation choices for short trips less than three miles. • Build a well-connected network of pedestrian routes, including safe street crossings, integrated with transit and nature that prioritize seamless, safe, convenient and comfortable access to urban centers and essential daily needs, including schools and jobs, for all ages and abilities. • Create walkable downtowns, centers, main streets and station communities that prioritize safe, convenient and comfortable pedestrian access for all ages and abilities. • Improve pedestrian access to transit. • Ensure that the regional pedestrian network equitably serves all people.
Transportation System Management and Operations Map Vision	<ul style="list-style-type: none"> • Use advanced technologies, pricing strategies and other tools to actively manage the transportation system. • Provide comprehensive real-time traveler information to people and businesses. • Improve incident detection and clearance times on the region’s transit, arterial and throughway networks. • Implement incentives and programs to increase awareness of travel options and incent change.

Source: 2014 Regional Transportation Plan (Adopted July 2014)

³ The Regional Transit Network Vision and policies are in the process of being updated as part of development of Regional Transit Strategy. This table reflects policies in the 2014 RTP.

⁴ The Regional Freight Network Vision is in the process of being updated as part of updating the Regional Freight Strategy.

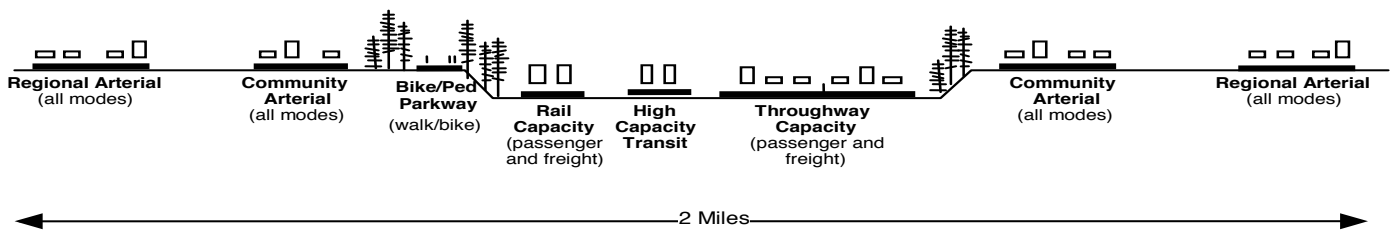
Regional Mobility Corridor Framework

The regional mobility corridor policy concept in Chapter 2 of the 2014 RTP calls for consideration of multiple facilities, modes and land use when identifying needs and most effective mix of land use and transportation solutions to improve mobility within a specific corridor area. More information from the 2014 RTP is provided below.

Regional Mobility Corridor Concept

Mobility corridors represent sub-areas of the region and include all regional transportation facilities within the subarea as well as the land uses served by the regional transportation system. This includes freeways and highways and parallel networks of arterial streets, regional bicycle and pedestrian parkways, high capacity transit, and frequent bus routes. The function of this network of integrated transportation corridors is metropolitan mobility – moving people and goods between different parts of the region and, in some corridors, connecting the region with the rest of the state and beyond. This framework emphasizes the integration of land use and transportation in determining regional system needs, functions, desired outcomes, performance measures, and investment strategies. The concept of a regional mobility corridor is illustrated in **Figure 1**.

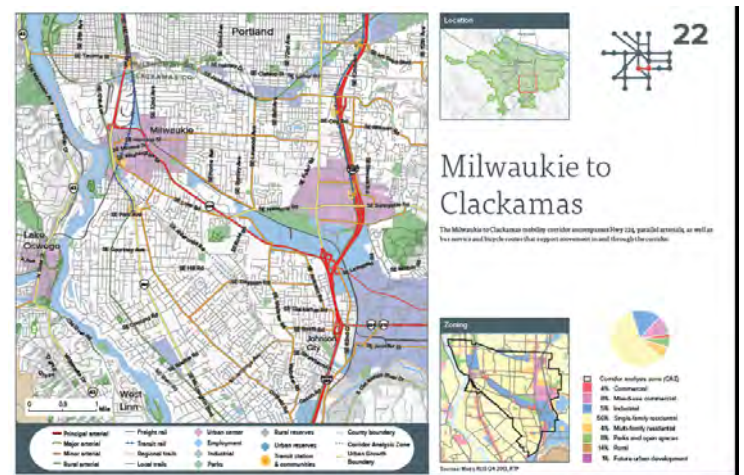
Figure 1. Regional Mobility Corridor Concept (transportation element)



Note: Idealized concept for illustrative purposes showing recommended range of system analysis for the evaluation, monitoring, management and phasing of investments to throughways, arterial streets and transit service in the broader corridor. The illustration is modeled after I-84 between 12th and 60th avenues in Northeast Portland.

Since the 1980s, regional mobility corridors have had throughway travel supplemented by high capacity transit service that provides an important passenger alternative. Parallel arterial streets, heavy rail, bus service, bicycle parkways and pedestrian/bicycle connections to transit also provide additional capacity in the regional mobility corridors.

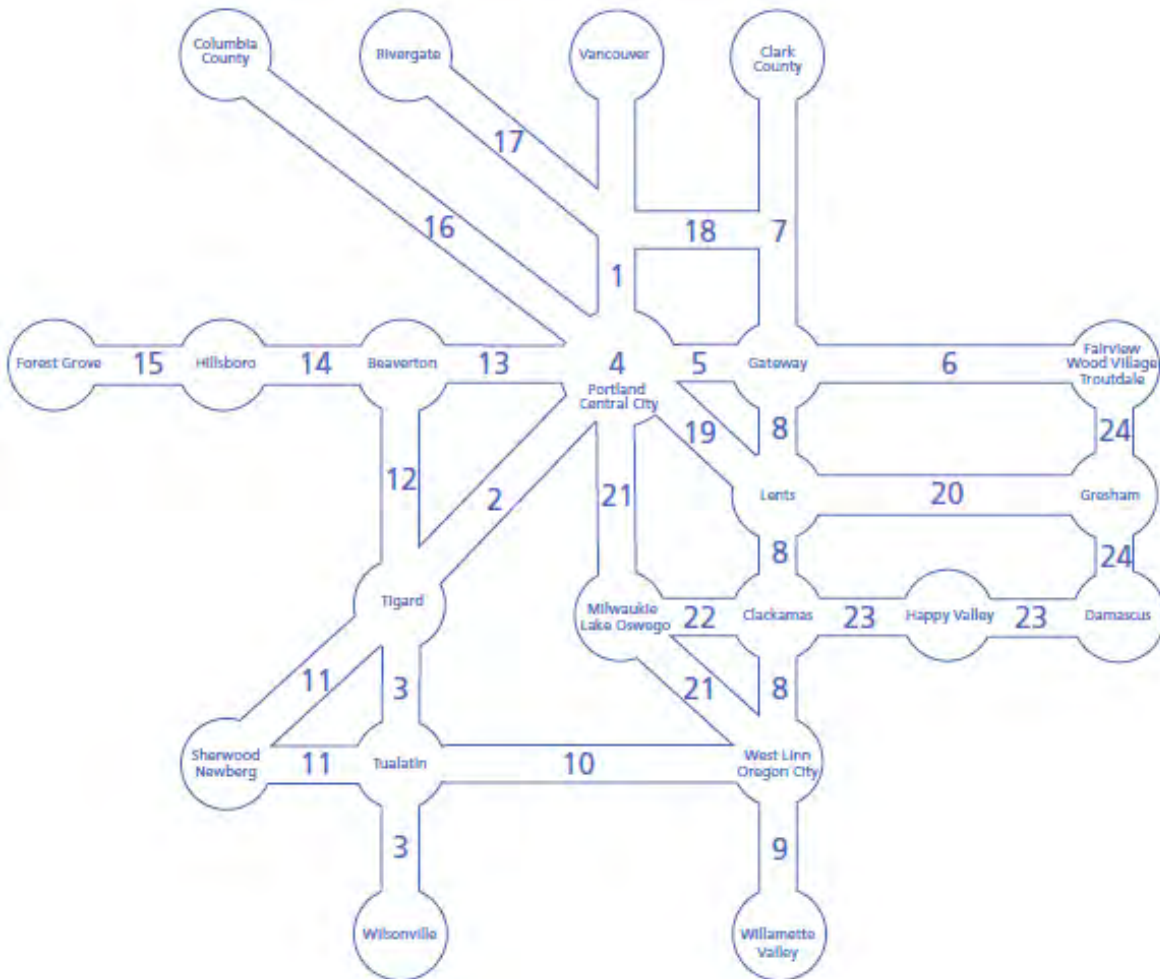
The full array of regional mobility corridor facilities should be considered in conjunction with the parallel throughways for system evaluation and monitoring, system and demand management and phasing of physical investments in the individual facilities. Bicycle and pedestrian travel and access to transit are also important as we plan and invest in regional throughways and arterial streets. New throughway and arterial facilities, such as freeway interchanges or widened arterial streets, should be designed and constructed in such a manner as to support bicycling, walking and access to transit.



Excerpt from Regional Mobility Corridor Atlas to show the land use and geographic context.

Figure 2 shows the general location of mobility corridors in the region.

Figure 2. General Location of Mobility Corridors in the Portland Metropolitan Region



The Mobility Corridor Strategies provided in Section 3.1 of the 2014 RTP Technical Appendix serve as a scoping tool to document land use and transportation needs, function and potential solutions for each of the region’s 24 mobility corridors. A strategy has been identified in the 2014 RTP Technical Appendix for each corridor that includes:

- Integrated statement of mobility corridor function and purpose defined at a corridor-area level
- Proposed land use and transportation solutions after consideration of land use, local aspirations, pedestrian, bike, management and operations, freight, highway, road and transit solutions.

The 2014 RTP Technical Appendix and can be downloaded at: www.oregonmetro.gov/regional-transportation-plan. The document is located at the bottom of the web page.

2.4 REGIONAL SYSTEM DEFINITION

Multi-modal regional transportation facilities and services are defined both by the function they serve and by where they are located. Facilities and services are included in the regional transportation system based on their function within the regional transportation system rather than their geometric design, ownership or physical characteristics.

A facility or service is part of the regional transportation system if it provides access to any activities crucial to the social or economic health of the Portland metropolitan region, including connecting the region to other parts of the state and Pacific Northwest or provides access to and within 2040 Target areas, as described below.

Facilities that connect different parts of the region together are crucial to the regional transportation system. Any link that provides access to or within a major regional activity center such as an airport or 2040 target area is also a crucial element of the regional transportation system. These facilities are shown on the network maps in this chapter.

As a result, the regional transportation system is defined as:

1. All state transportation facilities (including interstate, statewide, regional and district highways and their bridges, overcrossings and ramps).
2. All arterial facilities and their bridges.
3. Transportation facilities, including bicycle and pedestrian facilities, within designated 2040 centers, corridors, industrial areas, employment areas, main streets and station communities.
4. All high capacity transit and regional transit networks and their bridges.
5. All regional bicycle and pedestrian facilities and their bridges, including regional trails shown on the regional pedestrian and bicycle networks.
6. All bridges that cross the Willamette, Columbia, Clackamas, Tualatin or Sandy rivers.
7. All freight and passenger intermodal facilities, airports, rail facilities and marine transportation facilities and their bridges.

Regional Transportation System Components

Regional multi-modal transportation facilities and services include the following components:

1. Regional System Design
2. Regional Arterial and Throughway Network, which includes the National Highway System (NHS) and State highways
3. Regional Transit Network
4. Regional Freight Network
5. Regional Bicycle Network
6. Regional Pedestrian Network
7. Regional System Management & Operations which includes Demand Management

Excerpt from 2014 Regional Transportation Plan Attachment 1

8. Any other transportation facility, service or strategy that is determined by JPACT and the Metro Council to be of regional interest because it has a regional need or impact (e.g. transit-oriented development, transportation system management and demand management strategies, local street connectivity, and culverts that serve as barriers to fish passage).

Together, these facilities and services constitute an integrated and interconnected system that supports desired land use and provides transportation options to achieve the goals of the RTP.

Visions, concepts and supporting policies are described for each component in the next section.

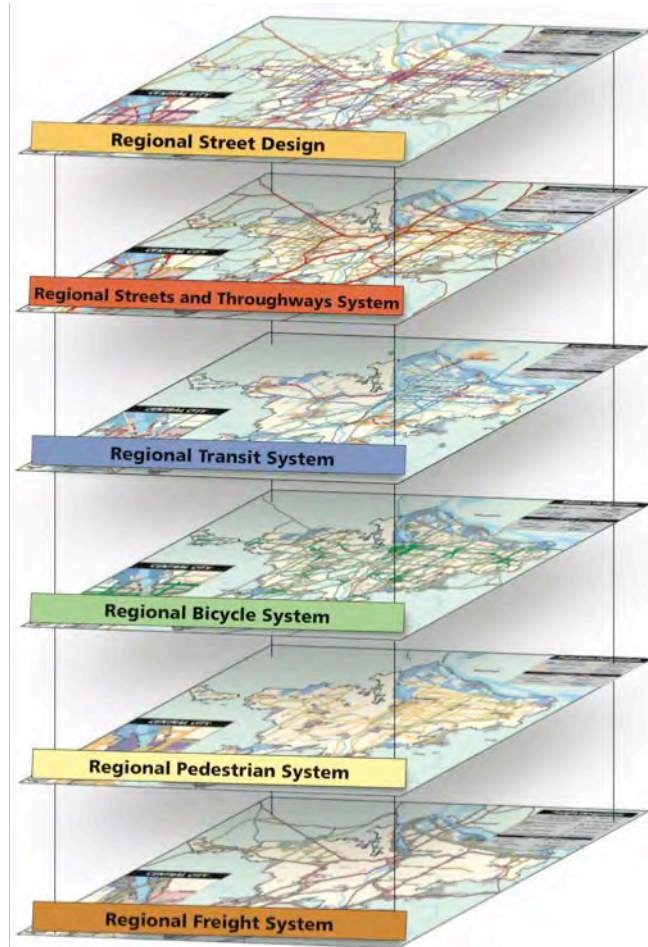
2.5 REGIONAL NETWORK VISIONS, CONCEPTS AND POLICIES

This section establishes a network vision,

concept and supporting policies for each component of the regional transportation system. The network vision, concepts and policies represent a complete urban transportation system that meets the plan goals and supports local aspirations for growth.

The network visions, concepts and policies provide for travel through a seamless and well-connected system of regional throughways and streets, local streets, freight networks, transit services and bicycle and pedestrian facilities. The concepts and policies emphasize safety, access, mobility and reliability for people and goods and the community-building and placemaking role of transportation.

The network visions, concepts and policies guide the development, design and management of different components of the regional transportation system.












Regional Transportation Network Components

Arterial and Throughway Network

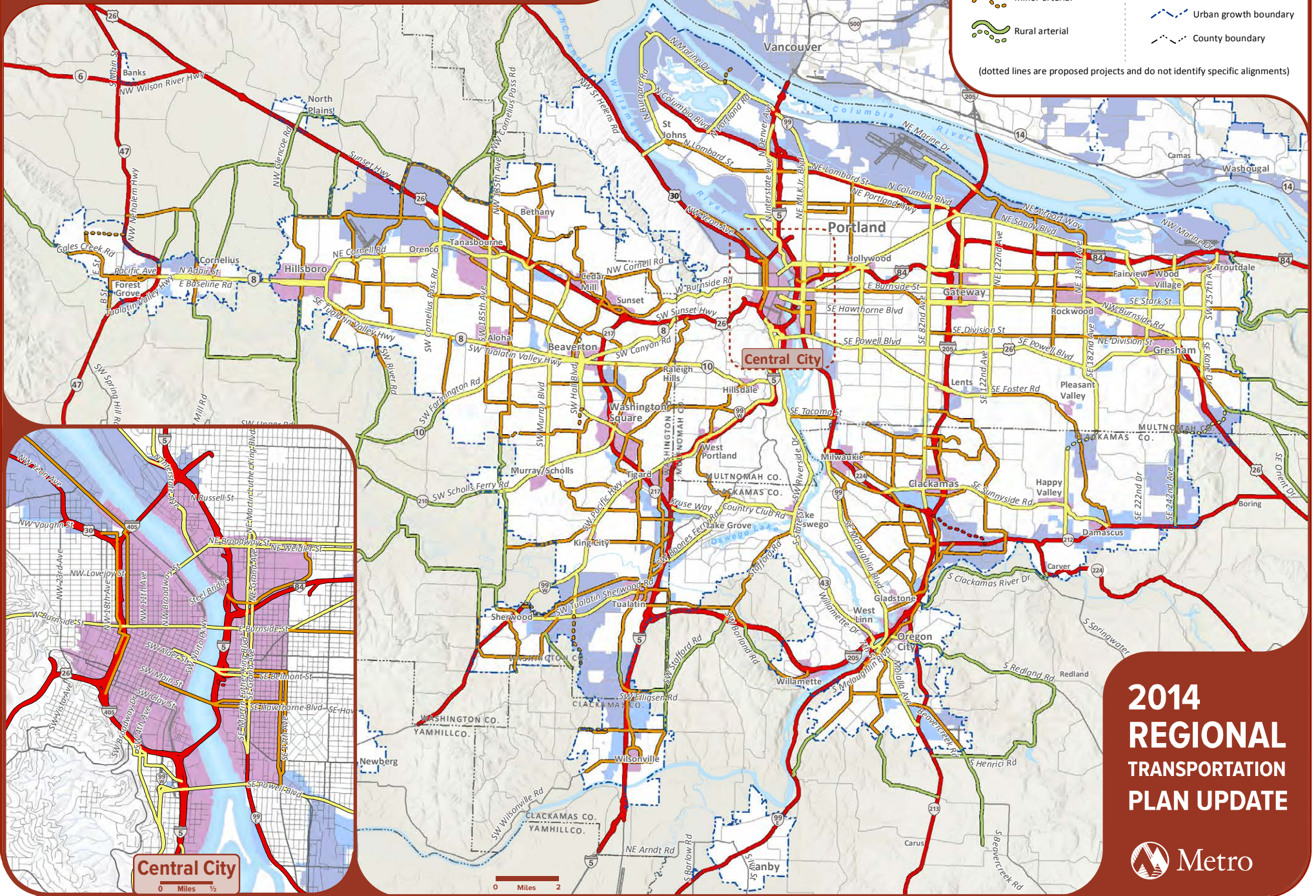
Excerpt from 2014 Regional Transportation Plan

Figure 2.7

Attachment 1

-  Principal arterial
-  Major arterial
-  Minor arterial
-  Rural arterial
-  Urban centers
-  Employment
-  Industry
-  Urban growth boundary
-  County boundary

(dotted lines are proposed projects and do not identify specific alignments)



**2014
REGIONAL
TRANSPORTATION
PLAN UPDATE**



Central City
0 Miles 1/2

0 Miles 2

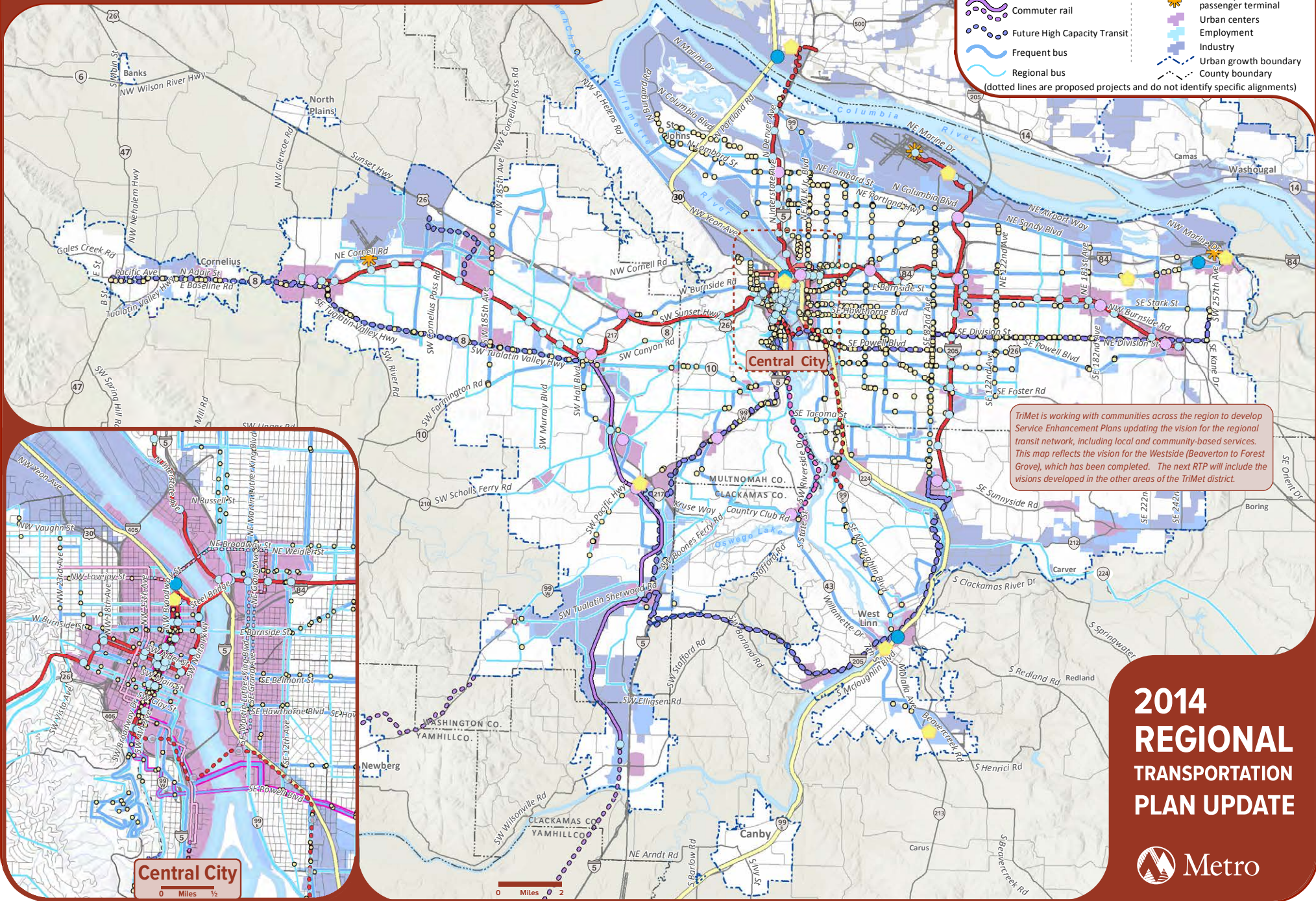
Regional Transit Network

Figure 2.10

Excerpt from 2014 Regional Transportation Plan

Attachment 1

- Light rail
 - Streetcar
 - Rapid streetcar
 - Inter-city high-speed rail
 - Commuter rail
 - Future High Capacity Transit
 - Frequent bus
 - Regional bus
 - Regional transit facility
 - Inter-city bus passenger terminal
 - Inter-city rail passenger terminal
 - Transit centers / HCT stations / Major bus stops
 - Inter-city air passenger terminal
 - Urban centers
 - Employment
 - Industry
 - Urban growth boundary
 - County boundary
- (dotted lines are proposed projects and do not identify specific alignments)



TriMet is working with communities across the region to develop Service Enhancement Plans updating the vision for the regional transit network, including local and community-based services. This map reflects the vision for the Westside (Beaverton to Forest Grove), which has been completed. The next RTP will include the visions developed in the other areas of the TriMet district.

Central City
0 Miles 1/2

0 Miles 2

2014 REGIONAL TRANSPORTATION PLAN UPDATE



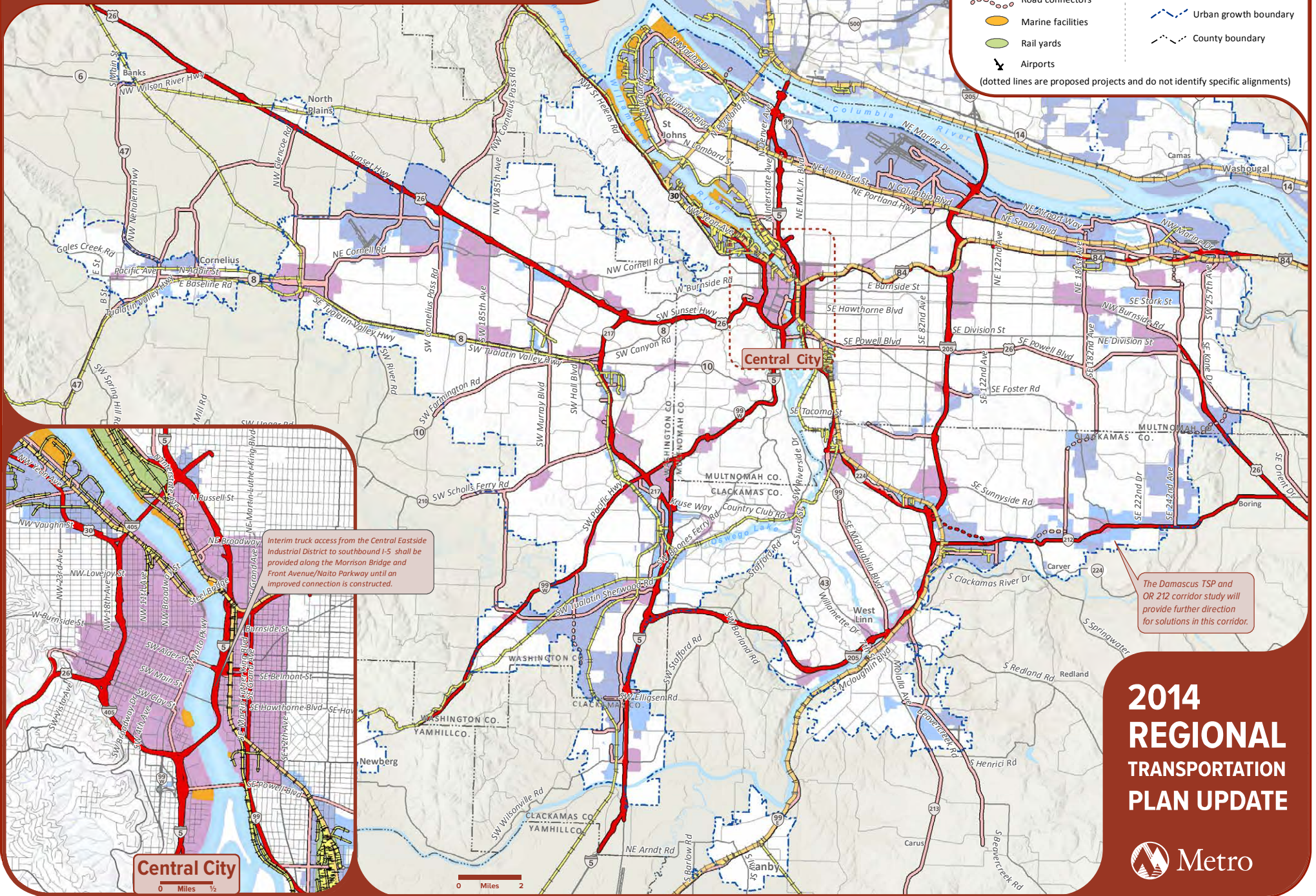
Regional Freight Network

Figure 2.15

Excerpt from 2014 Regional Transportation Plan

Attachment 1

- Main railroad lines and spur tracks
 - Branch railroad lines and spur tracks
 - Main roadway routes
 - Road connectors
 - Marine facilities
 - Rail yards
 - Airports
 - Urban centers
 - Employment
 - Industry
 - Urban growth boundary
 - County boundary
- (dotted lines are proposed projects and do not identify specific alignments)



Central City

Interim truck access from the Central Eastside Industrial District to southbound I-5 shall be provided along the Morrison Bridge and Front Avenue/Naito Parkway until an improved connection is constructed.

0 Miles 1/2

The Damascus TSP and OR 212 corridor TSP study will provide further direction for solutions in this corridor.

2014 REGIONAL TRANSPORTATION PLAN UPDATE



Regional Bike Network

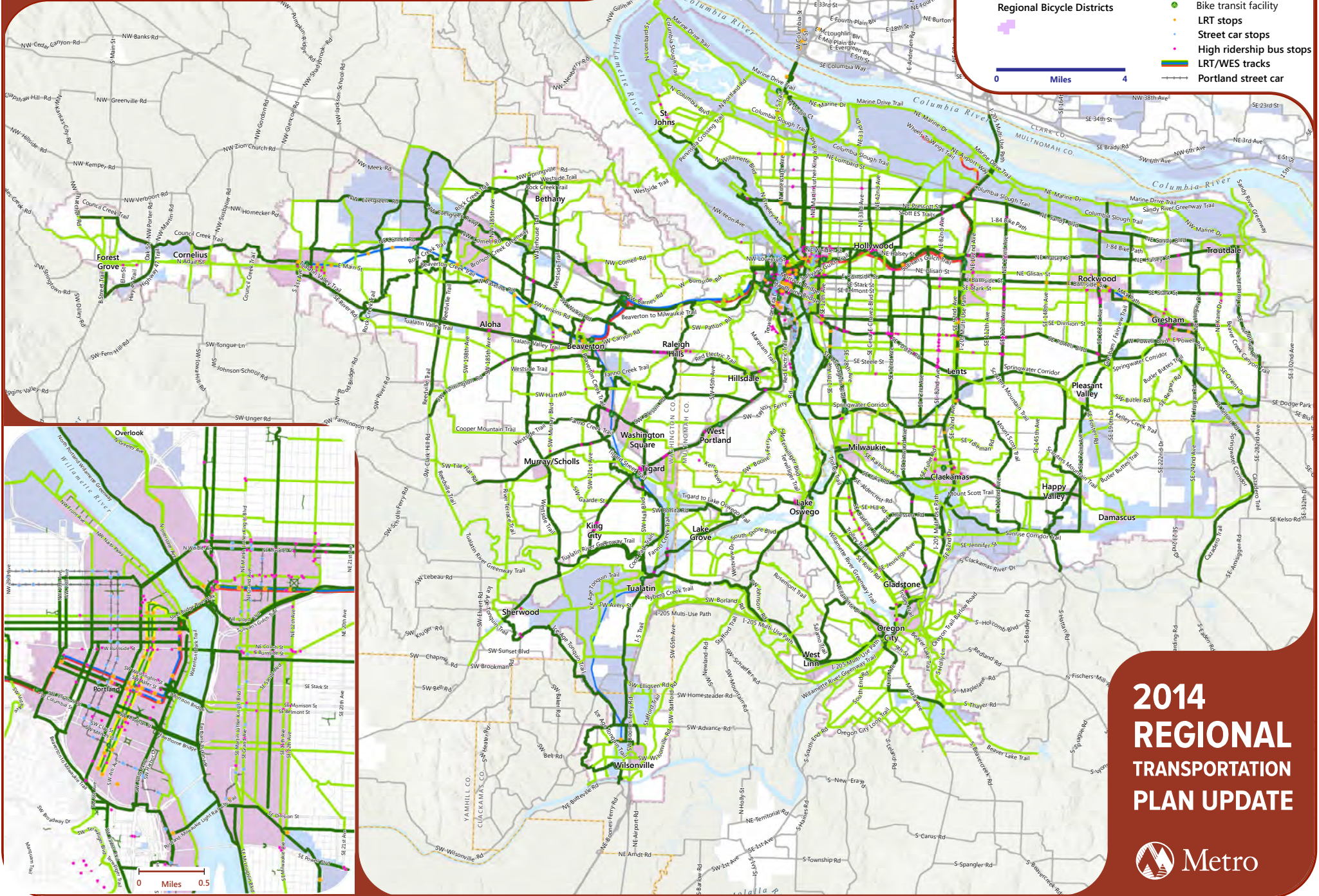
Figure 2.18

Excerpt from 2014 Regional Transportation Plan

Attachment 1

- Bicycle Parkway
- Regional Bikeway
- Regional Bicycle Districts
- Parks and natural areas
- Industrial and Employment
- County line
- ugb
- Bike transit facility
- LRT stops
- Street car stops
- High ridership bus stops
- LRT/WES tracks
- Portland street car

0 Miles 4



**2014
REGIONAL
TRANSPORTATION
PLAN UPDATE**

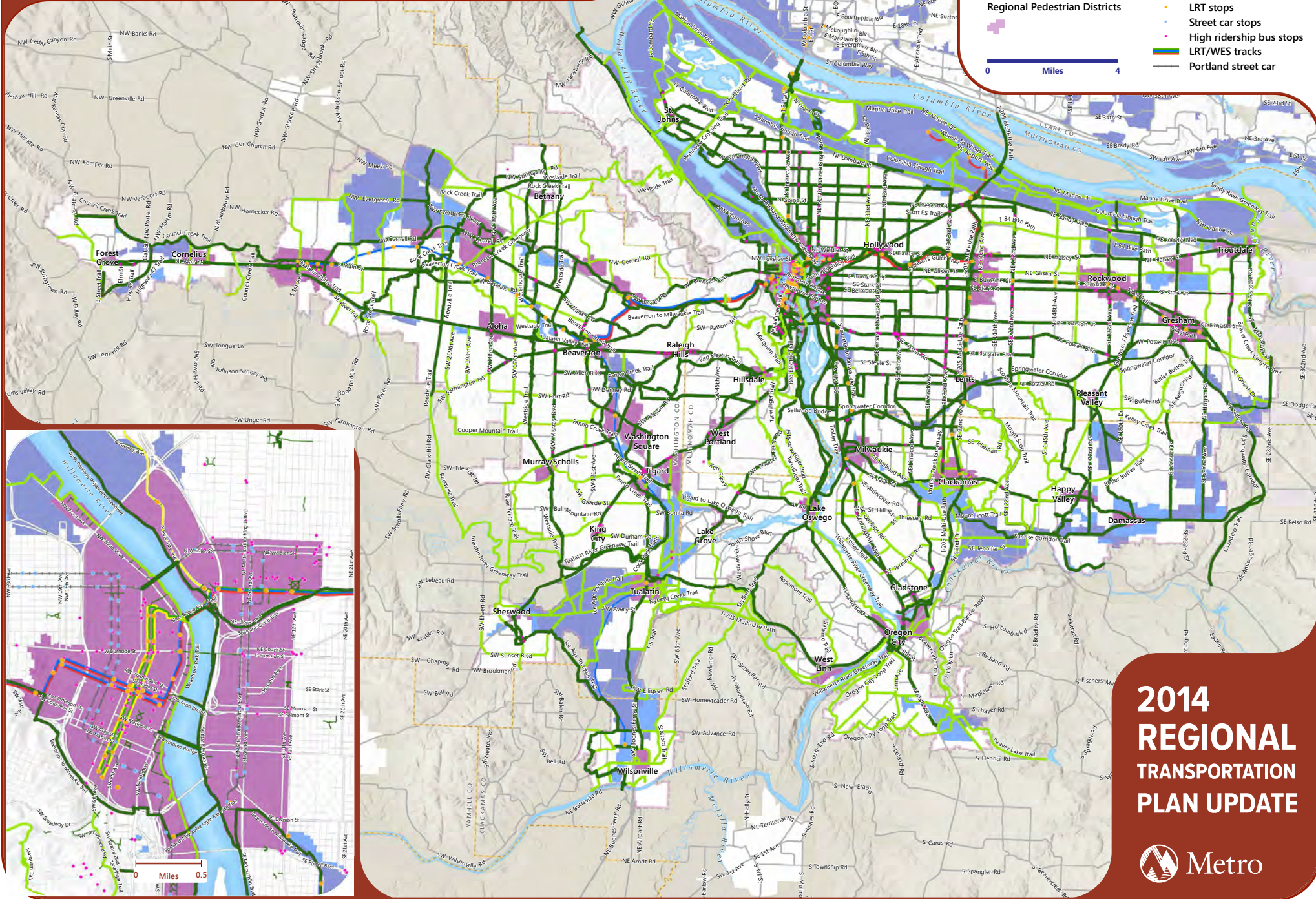


Regional Pedestrian Network

Figure 2.20

Excerpt from 2014 Regional Transportation Plan

Attachment 4



**2014
REGIONAL
TRANSPORTATION
PLAN UPDATE**





600 NE Grand Ave.
Portland, OR 97232-2736
oregonmetro.gov

INFORMATION ON 2018 RTP CALL FOR PROJECTS & PROGRAMS

The following information is being provided to assist project sponsors as they prepare for the 2018 RTP Call For Projects. Pending direction from JPACT and the Metro Council, the Call for Projects will occur from June 1 to July 21, 2017.

By July 21, 2017, project sponsors must submit all required forms for all projects electronically via Metro’s on-line system to Rebecca Hamilton rebecca.hamilton@oregonmetro.gov. All agencies must adhere to this deadline.

All forms and resources are linked in this document and will be available from Metro’s website at www.oregonmetro.gov/2018PROJECTS NOTE THIS WEB PAGE IS UNDER DEVELOPMENT

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Schedule and timeline

To be added

Agency contacts and Metro staff liaison

Agency	Agency contact	Metro liaison
City of Portland	Courtney Duke (503) 823-7265 courtney.duke@pdxtrans.org	Lake McTighe (503) 797-1747 lake.mctighe@oregonmetro.gov
Clackamas County and cities	Karen Buehrig (503) 742-4683 karenb@co.clackamas.or.us	Dan Kaempff (503) 813-7559 dan.kaempff@oregonmetro.gov
Multnomah County and cities (excluding City of Portland)	Joanna Valencia (503) 988-3043 x29637 Joanna.valencia@multco.us	Jamie Snook (503) 797-1751 jamie.snook@oregonmetro.gov
Washington County and cities	Chris Deffebach (503) 846-3406 Christina.Deffebach@co.washington.or.us	Kim Ellis (503) 797-1617 kim.ellis@oregonmetro.gov
TriMet	Eric Hesse (503) 962-4977 hessee@trimet.org	Jamie Snook (503) 797-1751 jamie.snook@oregonmetro.gov
ODOT	Lidwien Rahman (503) 731-8229 lidwien.rahman@odot.state.or.us	John Mermin (503) 797-1747 john.mermin@oregonmetro.gov

Staff level county coordination meetings

City of Portland	<ul style="list-style-type: none"> • TBD • TBD <p><i>Meetings are normally held</i></p>
Clackamas County Coordinating Committee Transportation Advisory Committee	<ul style="list-style-type: none"> • TBD • TBD <p><i>Meetings are normally held at the Sunnybrook Service Center, room 406 at 9101 SE Sunnybrook Boulevard in Clackamas, OR.</i></p>
East Multnomah County Transportation Committee	<ul style="list-style-type: none"> • TBD • TBD <p><i>Meetings are normally held at the Multnomah County Yeon annex, Willamette Conference room at 1600 SE 190th Avenue in Portland, OR.</i></p>
Washington County Coordinating Committee Transportation Advisory Committee	<ul style="list-style-type: none"> • TBD • TBD <p><i>Meetings are normally held at the Beaverton Library conference room at 12375 SW 5th Street in Beaverton, OR.</i></p>

Note: Additional meetings may be held as needed. Confirm meeting dates, times and locations with local agency contacts. Metro staff have been assigned to provide technical support throughout the RTP solicitation process and will participate in these meetings.

Metro staff contacts

Metro staff have been assigned to provide technical support throughout the RTP solicitation process.

2018 RTP Update Process	Kim Ellis
Public involvement and Title VI non-discrimination documentation	Cliff Higgins
RTP finance and Agency revenues	Ted Leybold and Ken Lobeck
Safety projects	Lake McTighe
Pedestrian, bicycle and trail projects	Lake McTighe and John Mermin
Freight projects and Regional Freight Plan	Tim Collins
Mobility corridors, road and bridge capacity or reconstruction projects	John Mermin or Tim Collins
Demand management projects and programs	Dan Kaempff
System management and operations projects and programs	Caleb Winter
Centers or transit-oriented development projects	TBD
Transit projects and programs	Jamie Snook
Cost estimate methodology	TBD
Travel demand model assumptions	Cindy Pederson
Geographic information system data	Matthew Hampton
On-line project application and evaluation database	TBD

Who is eligible to submit project or programs to the RTP?

Eligible entities are referred to as project sponsors and include:

- Clackamas County and its cities
- Multnomah County and its cities
- Washington County and its cities
- Metro
- South Metro Area Regional Transit (SMART) district
- TriMet
- Oregon Department of Transportation (ODOT)
- Port of Portland (in coordination with transportation agencies and county coordinating committees)
- Portland Streetcar, Inc. (in coordination with the City of Portland and TriMet)
- Transportation management associations (in coordination with transportation agencies, county coordinating committees and transit providers)
- Special districts (e.g., Tualatin Hills Parks and Recreation, Clackamas Parks and Recreation, Portland Bureau of Environmental services) and railroad operators in coordination with transportation agencies and county coordinating committees

How will project and program submittals be coordinated?

1. Coordination of submittals will occur through ongoing public meetings of county coordinating committees, the city of Portland and the Transportation Policy Alternatives Committee (TPAC).
2. Metro staff liaisons for each county, the City of Portland, ODOT, TriMet and SMART have been identified to assist in this effort.
3. County coordinating committee lead staff will manage project submittals for the county and its cities.
4. City of Portland transportation staff will manage project submittals for the city.
5. Portland Streetcar, Inc. staff will participate in meetings held by the City of Portland and TriMet to coordinate their respective project submittals.
6. The Port of Portland, park districts, and city and county trails, environmental services, railroad operators and land use staff will participate in meetings held by their respective county coordinating committee or the City of Portland to coordinate their respective project submittals.
7. The Port of Portland, TriMet, and the South Metro Area Regional Transit (SMART) will submit required project information directly to Metro.¹
8. ODOT will submit required project information directly to Metro.²

¹ TriMet and SMART manage transit capital and service expansion investments to submit within their respective funding forecast in coordination with the county coordinating committees, the City of Portland and Metro. Local agencies may include transit projects within their respective funding forecast with the support of the appropriate transit provider. Federally-required local match for transit capital projects must be accounted for in the submittals.

² ODOT manages state highway investments to submit within the ODOT funding forecast in coordination with the Region 1 ACT, county coordinating committees, the City of Portland and Metro. Local agencies may submit projects on State facilities within their respective funding forecast with ODOT support.

9. Metro will submit regional projects and programs in coordination with project sponsors and coordinating committees.
10. While each project sponsor is responsible for submitting required project information, the City of Portland and county coordinating committees will each submit a list of all projects and programs proposed for the sub-region (including projects and programs proposed by special districts, TriMet, SMART and ODOT). The list must be organized in order of priority within three groupings:
 - highest priority (2018-2027 in Constrained project list)
 - high priority (2028-2040 in Constrained project list)
 - additional priority (2028-2040 in Strategic/Unconstrained project list).

What endorsements are required for project and program submittals?

1. Each county coordinating committee, the City of Portland, TriMet, SMART, the Port of Portland and ODOT must endorse their *Constrained Priorities* and *Additional Priorities* project lists submitted to Metro.
2. The policy-level county coordinating committee should be the endorsing body for the county coordinating committees (C-4, EMCTC, & WCCC).
3. For the City of Portland, TriMet, SMART, ODOT and the Port of Portland, an elected or appointed body should serve as the endorsement body (Portland City Council, TriMet Board, SMART Board, Oregon Transportation Commission, & Port Commission).
4. Endorsements must happen prior to the July 21, 2017 project submittal deadline.

What projects and programs can be submitted?

1. Projects and programs submitted must align with regional policies and goals. The 2014 RTP goals, policies, system map designations and performance targets provide the policy framework for which projects must be consistent. If a project is not on a RTP system map, an RTP System Map Changes Worksheet (Form H) must be submitted.
2. Projects must demonstrate that appropriate requirements for public involvement and analysis of community need for the project has been met. This means projects must have: 1) emerged from a planning process that identified the project to address a transportation need on the regional transportation system; and 2) the project was identified as a priority for funding through that process. The planning process must have provided opportunities for public comment and made efforts to engage historically marginalized communities.³ (Form D)
3. Planning processes from which projects are eligible for submission include:

Local Transportation System Plans	TriMet Transit Improvement Program
Regional Travel Options Strategic Plan	TriMet Service Enhancement Plans
Regional Active Transportation Plan	Portland Streetcar System Plan
Regional Transportation System Management and Operations Plan	Portland Bicycle Plan for 2030
Regional Freight and Goods Movement	Other adopted City, County ODOT, TriMet

³ Historically marginalized communities are defined as persons living with a disability, persons of color, persons with low income, people with limited English proficiency, youth and older adults.

Action Plan	and SMART plans and studies, including concept and safety plans
Regional High Capacity Transit Plan	SMART Master Plan
Regional Active Transportation 10-year Investment Strategy list of projects	Park district plans
Southwest Corridor Shared Investment Strategy	Division Transit Project Corridor-wide Strategy
Regional Safe Routes to School Framework or other adopted Safe Routes to Schools plans and studies	

How do agencies certify public involvement and non-discrimination requirements have been or will be met?

Metro relies on agencies to conduct the local public engagement needed for all projects to come into the RTP. The public involvement checklist and non-discrimination certification is a pass/fail requirement for continuing the evaluation process and can be found in Form D and E.

1. Projects that have been adopted in a transportation system plan, subarea plan, topical (e.g. safety) plan, modal (e.g. freight) plan, or transit service plan through a public process. Form D provides an outline of the expected public involvement and non-discrimination efforts required when identifying and recommending projects to submit for the 2018 RTP.⁴ As part of the 2018 RTP project solicitation, each project sponsor will need to submit a completed Form D. Form D does not have to be completed for each individual project; a project sponsor may submit a single checklist that covers all of the projects that have met the requirements.
2. Projects that are undergoing a public process and have not yet been incorporated into a locally adopted plan. There may be cases where a project or multiple projects are being recommended for inclusion in the RTP, but the local adoption process has not been completed. Projects emerging from local planning processes that have not yet been incorporated into locally adopted plans may be submitted if the agency certifies it has or intends to complete the necessary public involvement requirements outlined in Appendix G of Metro’s Public Engagement Guide and has written support from the appropriate governing body recommending the project be included in the RTP. The certification is made by completing and submitting Form D. Form D does not have to be completed for each individual project; a project sponsor may submit a single checklist (Form D) for all relevant projects (both those from an adopted plan and those currently in development) to certify all the public involvement requirements will be met for each project in the near future.
3. Projects that are being submitted to be included in the 10-year regional transportation investment strategy (2018-2027 implementation). Form E provides an outline of the expected public involvement and non-discrimination efforts required when identifying and recommending projects to submit for the 2018 RTP 10-year investment strategy (2018-2027 implementation) and expected to seek state or federal funding to be implemented. The certification is made by completing and submitting Form E. Form E does not have to be

⁴ These requirements are also listed in Appendix G. of Metro’s Public Engagement Guide at: www.oregonmetro.gov/public-engagement-guide

completed for each individual project; a project sponsor may submit a single checklist (Form E) for all relevant projects to certify all the public involvement and non-discrimination requirements have been or will be met for each project during project development.

How many projects can be submitted?

- The table below lists *Constrained Priorities* funding levels for each county and the City of Portland that reflect locally identified revenues that are reasonably expected to be available for two time periods: 2018-2027 and 2028-2040.
- Similarly, the *Constrained Priorities* funding levels for ODOT, TriMet and SMART reflect identified revenues that are reasonably expected to be available from revenue sources that directly fund these agencies for both time periods.
- The funding levels are shown in millions of 2016 dollars. All project sponsors are requested to submit a project list in which the total project costs (in 2016 dollars) are no greater than their respective funding level.
- The *Additional Priorities* funding level will be set by JPACT and the Metro Council in advance of the Call of Projects.
- A process is being developed for identifying local and regional investment priorities that would be eligible for some portion of the region's share of CMAQ/STBG funding and future state and federal competitive grant program funding opportunities (e.g., *ConnectOregon*, STIP Enhance, TIGER, FAST Lane, etc.) and the Additional Priorities funding level to be set by JPACT and the Metro Council.
- For all projects anticipated to seek state or federal funding, a minimum 20% local match must be assumed from the agency revenues. Local match is defined as funds under the control of the project sponsor (e.g., Washington County MSTIP3e, locally collected SDCs or urban renewal fees, etc.). Funds previously awarded by Metro in prior Regional Flexible Funds Allocation processes do not count towards the local match. The local match cannot be counted towards more than one project

ADD FUNDING LEVELS TABLE

More information on the funding assumptions will be available upon request.

Guidance on project and program parameters

1. Projects or programs must cost at least \$1 million to be listed as a discrete project or program. Projects and programs that cost less than \$1 million must be bundled with other similar projects or programs (e.g., sidewalk projects on multiple streets in a downtown area) to be consistent with this requirement. Specific details, including location and extent, must still be provided for bundled projects.
2. Projects or programs with costs greater than \$1 million may either be listed separately or bundled into a broad programmatic category (e.g., seismic retrofits, transit service enhancements, bridge replacements). A list of programmatic categories will be developed along with further guidance. Specific details, including location and extent, must still be provided for bundled projects.
3. Highway, road, bicycle and transit capital expansion (e.g., High Capacity Transit, Bus Rapid Transit, Street Car) projects need to be modeled for air quality and greenhouse gas

emissions and therefore must be specifically identified as individual projects. Transit service expansion can be listed separately or bundled into a programmatic category.

4. Project development costs must be incorporated into overall project costs.
5. Projects that cost more than \$25 million must be submitted as discrete phases of project development (e.g., preliminary design, final design and engineering, right-of-way acquisition, and construction) and/or smaller, logical segments.
6. Project development costs for large capital projects that are in the *Additional Priorities* list can be included in the *Constrained Priorities* list as a discrete project.

List of Programmatic Categories

To be added

What information will project sponsors need to provide?

For new projects and programs

1. **General project information:** project location, need, and purpose, investment category, project design elements/cross-section and project sponsor contact information. See Form A.
2. **Cost estimate:** Total project cost in 2016\$, anticipated funding source(s) and confidence level in project cost estimate. For projects with an anticipated completion date in 2027 or earlier, project sponsors must complete Metro's cost estimate worksheet or use a comparable cost estimate methodology to update project costs for all capital projects. Submission of cost estimate worksheets is optional. If choosing alternate methodology – please send description of methodology to TBD for review. See Form _.
3. **Time period:** Anticipated time period for project or program completion as either 2018-2027 or 2028-2040 to match revenue forecast years and transportation equity analysis years. Projects and programs in the 2018-2027 time period must be on the *Constrained Priorities* list of projects. See Form A.
4. **Project modeling assumptions:** Documentation of modeling assumptions for all highway, road, bike and transit capacity projects. See Form B.
5. **GIS shapefile:** Electronic GIS shapefile of all location specific projects and programs submitted. See Form C.
6. **Public involvement checklist and non-discrimination certification:** Documentation of public involvement certifying that public involvement efforts were made or will be made and documented. See Forms D and E.
7. **RTP System Map Changes:** Identify relevant changes to RTP system maps to reflect new projects. See Form H.
8. **Project evaluation information:** Answer project evaluation related questions for each applicable project(s).

For revisions to existing 2014 RTP projects and programs

1. **General project information:** Revisions to existing project information, including revisions to project location, purpose, project design elements/cross-section, and project sponsor contact information. See Form A.
2. **Cost estimate:** Revisions to total project cost in 2016\$, anticipated funding source(s) and confidence level in project cost estimate. For projects with an anticipated completion date

in 2027 or earlier, project sponsors must complete Metro's cost estimate worksheet or use a comparable cost estimate methodology to update project costs for all capital projects. Submission of cost estimate worksheets is optional. If choosing alternate methodology – please send description of methodology to TBD for review. **See Form ___.**

3. **Time period:** Anticipated time period for project or program completion as either 2018-2027 or 2028-2040 to match revenue forecast years and transportation equity analysis years. Projects and programs in the 2018-2027 time period must be on the Constrained Priorities list of projects. See Form A.
4. **Project modeling assumptions:** Documentation of needed revisions to modeling assumptions for all highway, road, bike and transit capacity projects. See Form B.
5. **GIS shapefile:** Electronic GIS shapefile reflecting updates to the location of projects and programs in existing 2014 RTP. See Form C.
6. **Public involvement checklist and non-discrimination certification:** Documentation of public involvement certifying that public involvement efforts were made or will be made and documented. See Forms D and E.
7. **RTP System Map Changes:** Identify relevant changes to RTP system maps to reflect updates to existing projects.⁵ See Form H.
8. **Project evaluation information:** Answer project evaluation related questions for each applicable project(s).

What information and forms must be submitted for each proposed project and program?

Each of the following forms⁶ must be completed and submitted by the project sponsor or county coordinating committee lead staff as indicated below by **July 21, 2017** to rebecca.hamilton@oregonmetro.gov:

- Form A. Project Overview for each project and program, key information for each project or program to be included in the 2018 RTP Investment Strategy; for applicable projects responses to project evaluation questions must also be provided (one form for each project submitted by project sponsor) **NOTE THIS IS IN THE PROCESS OF BEING UPDATED TO BE AN ONLINE FORM**
- Form B. Modeling Assumptions Worksheet for each highway, road, bicycle and transit capital expansion (e.g., High Capacity Transit, light rail transit, bus rapid transit, street car) project; (one worksheet for each project submitted by project sponsor) **NOTE THIS IS IN THE PROCESS OF BEING UPDATED TO BE AN ONLINE FORM**
- Form C. GIS Shapefile submission via the online geodatabase or direct submission to Metro staff GIS liaison for new projects or updates to existing RTP projects (one

⁵ All requested system map changes must be accompanied with an explanation for the proposed change that demonstrates how the requested change is consistent with RTP policy. Project sponsor staff must consult with RTP staff on the proposed changes in advance of submitting the changes through the Call for Projects.

⁶ Staff are developing an on-line application system available for project sponsors to submit Forms A through E and Form H electronically. Forms F and G will be submitted electronically by the designated county coordinating committee lead staff.

shapefile per project submitted by project sponsor) NOTE THIS IS IN THE PROCESS OF BEING UPDATED

- Form D. Public Engagement and Non-Discrimination Certification for transportation system plan, subarea plan, topical or modal plan, or transit service plan development (one certification per project sponsor) NOTE THIS IS IN THE PROCESS OF BEING UPDATED
- Form E. Public Engagement and Non-Discrimination Certification for 10-year regional transportation investment strategy (2018-27 implementation) project submission (one per project sponsor) NOTE THIS IS IN THE PROCESS OF BEING UPDATED
- Form F. Constrained Regional Priorities Worksheet lists projects recommended to be included in the 2018 RTP Constrained Priorities list (one worksheet submitted by county coordinating committees, ODOT, TriMet, SMART, Metro and the City Portland) NOTE THIS IS IN THE PROCESS OF BEING UPDATED
- Form G. Additional Regional Priorities Worksheet listing projects recommended to be included in the 2018 RTP Additional Priorities list (one worksheet submitted by county coordinating committees, ODOT, TriMet, SMART, Metro and the city of Portland) NOTE THIS IS IN THE PROCESS OF BEING UPDATED
- Form H. RTP System Map Changes Worksheet listing recommended system map changes (one worksheet per project by project sponsor) NOTE THIS IS IN THE PROCESS OF BEING UPDATED

What resources will be available?

- Along with your local transportation system plan (TSP), subarea plan, modal and topical plans, transit service plans, several additional resources will be available.
- Metro has transportation staff liaisons for each county and the City of Portland to participate in meetings and assist in this effort.
- Metro also has contacts for topical questions.
- Available maps, documents and related-materials include:
 - 2014 RTP Project Maps by Subarea (in PDF and zoomable format)
 - 2014 RTP Modal System Maps (in zoomable format)
 - Regional Bike Network
 - Regional Pedestrian Network
 - Regional Transit Network (includes regional transit stops and stations)
 - Arterials and Throughways Network
 - Regional Freight Network (includes freight intermodal facilities)
 - Regional Active Transportation 10-Year Investment Strategy list of projects (projects on the list will be pre-populated in the on-line application for review by project sponsors)
 - Map of gaps in Regional bike and pedestrian networks (in zoomable or PDF format)
 - Regional Safe Routes To School Framework (in zoomable or PDF format)
 - Oregon Freight Bottlenecks (in PDF format)
 - Regional High Injury Corridors (in zoomable format)
 - Regional Crash Map (in zoomable format)

- Draft 2015 Atlas of Mobility Corridors (in PDF format)
- Historically marginalized communities data by census boundary:
 - Low-income
 - Persons of color
 - Low English proficiency
- 2016 Coordination Transportation Plan for Seniors and People with Disabilities data, needs and priorities (format TBD)
- Regional emergency transportation routes (ETRs) (format TBD)
- Seismic Lifeline Routes (format TBD)
- Title 4 Industrial and Employment areas designations (Title 4, Industrial and Other Employment areas Map, dated Oct. 2014) (in zoomable format)
- 2040 Centers (central city, regional centers, town centers and HCT station areas/station communities) (in zoomable format)
- Regional zoning classifications (in zoomable format)
- Resource habitat (in zoomable format)
- Designated Urban and Rural Reserves (in zoomable format)

Other general guidance

- All sponsors should look for opportunities to leverage local, regional, state, and federal resources.
- Other guidance to be added.

The forms, attachments and resources will be available to download from Metro's website at www.oregonmetro.gov/2018Projects NOTE THIS WEB PAGE IS UNDER DEVELOPMENT