



600 NE Grand Ave.
Portland, OR 97232-2736

Joint Policy Advisory Committee on Transportation (JPACT) agenda

Thursday, January 18, 2018

7:30 AM

Metro Regional Center, Council chamber

1. **Call To Order, Declaration of a Quorum & Introductions (7:30 AM)**
 2. **Citizen Communication on JPACT Items (7:35 AM)**
 3. **Update from the Chair & Committee Members (7:40 AM)**
 - *Volkswagen Settlement Update*
 - *OTC State Transportation Improvement Program*
 4. **Consent Agenda (7:45 AM)**
 - 4.1 Resolution No. 17-4856, For the Purpose of Adding or Amending Existing Projects to the 2018-21 Metropolitan Transportation Improvement Program Involving Seven Projects Requiring Programming Additions, Corrections, or Cancellations Impacting Metro, ODOT, Portland, and TriMet (NV18-04-NOV) [COM](#)
[17-0074](#)

Attachments: [Draft Resolution 17-4856](#)
[Exhibit A to Resolution 17-4856](#)
[Staff Report](#)
 - 4.2 Resolution No. 18-4858, For the Purpose of Adding or Amending Existing Projects to the 2018-21 Metropolitan Transportation Improvement Program Involving Six Projects Requiring Programming Additions or Corrections Impacting Gresham, King City, and ODOT (DEC18-05-DEC) [COM](#)
[17-0084](#)

Attachments: [Draft Resolution No. 18-4858](#)
[Draft Exhibit A to Resolution No. 18-4858](#)
[Draft Staff Report](#)
[Draft Attachment 1 to Staff Report](#)
 - 4.3 Consideration of November 16, 2017 Minutes [18-4941](#)

Attachments: [November 16, 2017 Minutes](#)
 5. **Information/Discussion Items**
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- 5.1 Red Line Extension (7:45 AM) [COM](#)
[17-0076](#)
- Presenter(s): Malu Wilkinson, Metro
Neil McFarlane, TriMet
- Attachments: [MAX Red Line Improvements Project](#)
- 5.2 Regional Travel Options Strategy Public Comment Draft (8:20 AM) [COM](#)
[18-0084](#)
- Presenter(s): Dan Kaempff, Metro
- Attachments: [Memo: DRAFT 2018 Regional Travel Options Strategy](#)
[2018 Regional Travel Options Strategy](#)
- 5.3 2018 RTP: Update on Technical Evaluation, Engagement Schedule, and Regional Leadership Forum #4 (8:40 AM) [COM](#)
[18-0085](#)
- Presenter(s): Kim Ellis, Metro
Clifford Higgins, Metro
- Attachments: [Memo: Investment Strategy Development and Refinement](#)
[2018 Council and Regional Advisory Committees Briefings](#)

6. Adjourn (9:00 AM)

Upcoming JPACT Meetings:

- *Thursday, February 15, 2018*
- *Thursday, March 15, 2018*
- *Thursday, April 19, 2018*

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលការបកប្រែលោកអ្នក ។

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2018 JPACT Work Program *As of 1/8/18*

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

January 18, 2018 -

- Chair comments TBD (5+ min)
 - Volkswagen Settlement Update
- **Resolution No. 17-4856**, For the Purpose of Adding or Amending Existing Projects to the 2018-21 Metropolitan Transportation Improvement Program Involving Seven Projects Requiring Programming Additions, Corrections, or Cancellations Impacting Metro, ODOT, Portland, and TriMet (NV18-04-NOV) (**consent**)
- **Resolution No. 18-4858**, For the Purpose of Adding or Amending Existing Projects to the 2018-21 Metropolitan Transportation Improvement Program Involving Six Projects Requiring Programming Additions, Corrections, or Cancellations Impacting Gresham, King City, and ODOT (DEC18-05-DEC) (**consent**)
- Red Line Extension – Information/Discussion (Malu Wilkinson, Metro; 40 min)
- Regional Travel Options Strategy Public Comment Draft – Information/Discussion (Dan Kaempff, Metro; 20 min)
- 2018 RTP: Update on Technical Evaluation, Engagement Schedule, and Regional Leadership Forum #4 – Information/Discussion (Kim Ellis/Clifford Higgins, Metro; 20 min)

January 22: JPACT Finance Subcommittee, Council Chamber, Metro Regional Center

February 15, 2018

- Chair comments TBD (5+ min)
- Draft RTP Evaluation Findings Discussion Guide and Update on Regional Leadership Forum #4 – Information/Discussion (Kim Ellis, Metro; 30 min)
- Draft RTX Policies and Strategies – Information/Discussion (Eliot Rose, Metro; 20 min)

March 2: RTP Regional Leadership Forum #4, Oregon Convention Center

<p><u>March 15, 2018</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Regional Leadership Forum #4 Takeaways and RTP Investment Priorities – Endorsement Requested (Ellis, Metro; 20 min) • Draft Safety Strategy – Information/Discussion (Lake McTighe, Metro; 20 min) • 2021-2024 STIP – MPO Comment Letter on Leverage Funding Programs Guidelines – Recommendation to the Metro Council (Grace Cho/Ted Leybold, Metro; 20 min) • Burnside Project Information – Information/Discussion (TBD; 15 min) • ODOT Value Pricing (TBD; 20 min) <p><u>March 14 – 16: PBA Trip to Washington D.C.</u></p>	<p><u>April 19, 2018</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • TransPort By-Laws – Recommendation to the Metro Council (consent) • Draft Freight Strategy – Information Discussion (Collins, Metro; 20 min) • Regional Travel Options Strategy Draft for Adoption – Recommendation to the Metro Council (Dan Kaempff, Metro; 30 min) • MPO-State-Transit Financial Forecasts for FY2021-2024 – Recommendation to Metro Council (TBD; 30 min)
<p><u>May 17, 2018</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Draft RTP (Focus on Policies and Implementation) – Information/Discussion (Ellis, Metro; 30 min) • Regional Transit Strategy – Information/Discussion (Snook, Metro; 30 min) • Draft RTX Strategies and Policies – Information/Discussion (Eliot Rose, Metro; 20 min) 	<p><u>June 21, 2018</u></p> <ul style="list-style-type: none"> • RFFA Active Transportation Project Development Funds Allocation (Ted Leybold/Lake McTighe, Metro; 15 min)
<p><u>July 19, 2018</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2021-2024 STIP – MPO Comment Letter on 150% Fix-It Lists and Leverage Considerations – Recommendation to the Metro Council (25 min) 	<p><u>August 16, 2018</u></p>
<p><u>September 20, 2018</u></p> <ul style="list-style-type: none"> • 2021-2024 STIP – MPO Comment Letter on 150% ARTS List and Leverage Considerations – Recommendation to the Metro Council • Introduce and Discuss TPAC Recommendation on 2018 RTP and Strategies for Freight, Transit, and Safety (Ellis; 60 min) 	<p><u>October 18, 2018</u></p> <ul style="list-style-type: none"> • JPACT Recommendation to Metro Council on Adoption of 2018 RTP and Strategies for Freight, Transit, and Safety (Ellis; 60 min)

<u>November 15, 2018</u>	<u>December 20, 2018</u>
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RTP Regional Leadership Forums:

- **March 2, 2018:** RTP Regional Leadership Forum #4 (Finalizing Our Shared Plan for the Region)

Parking Lot:

- Southwest Corridor Plan
- Prioritization of projects/programs
- Westside Freight Study/ITS improvements
- All Roads Safety Program (ODOT)
- Washington County Transportation Futures Study (TBD)
- Transportation Resiliency

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING OR AMENDING) RESOLUTION NO. 17-4856
EXISTING PROJECTS TO THE 2018-21)
METROPOLITAN TRANSPORTATION) Introduced by: “Chief Operating Officer
IMPROVEMENT PROGRAM INVOLVING FIVE) Martha Bennett in concurrence with
PROJECTS REQUIRING PROGRAMMING) Council President Tom Hughes”
ADDITIONS, CORRECTIONS, OR)
CANCELLATIONS IMPACTING METRO, ODOT,)
AND PORTLAND (NV18-04-NOV))

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation related funding; and

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved the 2018-21 MTIP via Resolution 17-4817 on July 27, 2017; and

WHEREAS, JPACT and the Metro Council must approve any subsequent amendments to add new projects or substantially modify existing projects in the MTIP; and

WHEREAS, the U.S. Department of Transportation (USDOT) has issued clarified MTIP amendment submission rules and definitions for MTIP formal amendments and administrative modifications that both ODOT and all Oregon MPOs must adhere to which includes that all new projects added to the MTIP must complete the formal amendment process; and

WHEREAS, complications in building and delivering two proposed Compressed Natural Gas (CNG) Fueling Centers resulted in Metro and Portland declining the awarded ODOT Congestion Mitigation Air Quality (CMAQ) improvement funds thereby ending both projects; and

WHEREAS, ODOT will initiate the Preliminary Engineering phase for the I-5 Boone (Willamette River) Bridge project to develop required shelf-ready plans to future deck overlay, joint repairs and seismic retrofit; and

WHEREAS, ODOT will implement two US30BY projects, allowing for improved and needed safety/preservation projects planned for US30BY (Lombard Safety Extension) at milepost 3.50 to North Wilbur that will include signal upgrades, installation of a pedestrian island, and complete identified American Disability Act (ADA) requirements with a second planned project at US30BY/Fenwick; and

WHEREAS, all amended projects were evaluated against six revised MTIP review factors to ensure all requested changes and additions can be accomplished legally through the MTIP amendment process; and

WHEREAS, the MTIP review factors included project eligibility/proof of funding, RTP consistency with the financially constrained element, consistency with RTP goals and strategies, determination of amendment type, inclusion in the Metro transportation regional models, determination of Regional Significance, fiscal constraint verification, and compliance with MPO MTIP federal management responsibilities; and

WHEREAS, the MTIP's financial constraint finding is maintained as all projects proof of funding has been verified; and

WHEREAS, no negative impacts to air conformity will exist as a result of the changes completed through the November 2017 Formal MTIP Amendment; and

WHEREAS, all projects included in the November 2017 Formal MTIP Amendment successfully completed a required 30-day public notification/opportunity to comment period without any significant issues raised; and

WHEREAS, TPAC received their notification and recommended approval on November 17, 2017 and approved the amendment recommendation to JPACT; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on December 21, 2017 to formally amend the 2018-21 MTIP to include the November 2017 Formal Amendment bundle consisting of five projects.

ADOPTED by the Metro Council this ____ day of _____ 2018.

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

2018-2021 Metropolitan Transportation Improvement Program
 Exhibit A to Resolution 17-4856



Proposed November 2017 Formal Amendment Bundle Amendment Type: FORMAL, NV18-04-NOV Total Number of Projects: 5			
Project # ODOT Key	Lead Agency	Project Name	Required Changes
#1 19188	Metro	Metro Central Transfer Station: CNG Fueling	Project canceled from 2018 MTIP: The project will not move forward and be constructed as planned. It is being removed from the 2018 MTIP through this amendment
#2 21218 New	ODOT	I-5: Boone (Willamette River) Bridge	Adds only the PE phase to this bridge rehab project to the 2018 MTIP
#3 20413	ODOT	US30BY (Lombard) Safety Extension	Cost increase: Adds needed funding to the PE and ROW phases to address the phase funding shortage
#4 20415	ODOT	US30BY (Lombard) at Fenwick	Project requires a cost increase to address additional ADA compliance requirements and potentially will be combined into Key 20413 above. Key 20415 will be canceled assuming combination does occur. Otherwise Key 20415 will be removed as part of the November 2017 Amendment Bundle.
#5 19552	Portland	Clean Energy Public Access CNG Station (Portland)	Cancel project officially from 2018 MTIP and 2018 STIP. CMAQ funding declined. Project will not move forward.

Exhibit A to Resolution 17-4856

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #1 EXISTING MTIP PROGRAMMING										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
19188	70815	Metro	Metro Central Transfer Station: CNG Fueling					Other	\$ 1,853,547	
Project Description:			Construct a Compressed Natural Gas fueling station to dispense renewable natural gas							
Existing MTIP Project Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
CMAQ-State	M400	Federal	2017					\$ 891,381	\$ 891,381	
Local	Match	Match	2017					\$ 102,023	\$ 102,023	
Other	OTH0	Local	2017					\$ 860,143	\$ 860,143	
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,853,547	\$ 1,853,547	

PROJECT #1 PROPOSED AMENDED CHANGES										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
19188	70815	Metro	Metro Central Transfer Station: CNG Fueling					Other	\$ -	
Project Description:			Construct a Compressed Natural Gas fueling station to dispense renewable natural gas							
Amended MTIP Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
CMAQ-State	M400	Federal	2017					\$ -	\$ -	
Local	Match	Match	2017					\$ -	\$ -	
Other	OTH0	Local	2017					\$ -	\$ -	
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment. 2. CMAQ-State = Federal Congestion Mitigation Air Quality (CMAQ) improvement funds that ODOT allocates and manages 3. Local = General local funds the lead agency provides for the required match to the federal funds 4. Other = Additional local funds the lead agency commits to the project above the required match. Also called "overmatch"									

Amendment Summary
Project will not proceed and be constructed. The amendment officially cancels the project from the 2018 MTIP.

Exhibit A to Resolution 17-4856

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #2 EXISTING MTIP PROGRAMMING - None New Project

PROJECT #2 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
21218	TBD	ODOT	I-5: Boone (Willamette River) Bridge	Highway	\$ 250,000
Project Description:			On I-5 in Wilsonville at the Boone Bridge over the Willamette River, prepare shelf ready plans for future deck overlay, joint repairs and seismic retrofit.		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Other (Utility Relocation)	Construction	Total
NHPP-FAST	Z001	Federal	2018		\$ 230,550				\$ 230,550
State	Match	State	2018		\$ 19,450				\$ 19,450
Total:				\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ 250,000

Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
	2. NHPP-FAST = Federal National Highway Performance Program (FAST Act allocation) funding
	3. State = ODOT state funds added to the project phase as their required match to the federal fund type ADVCON.

Amendment Summary

Through this amendment, the PE phase is added to the 2018 MTIP. The implementation phases (ROW if needed and construction) will be added later. Project will focus on pre-NEPA project development

Exhibit A to Resolution 17-4856

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #3 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
20413	70969	ODOT	US30BY (Lombard) Safety Extension					Roadway and Bridge	\$ 6,432,038
Project Description:			Road diet between MP 3.50 and N Wilbur. Signal upgrades at Fiske; Woolsey; Chautauqua; Wabash; Peninsular; and Greeley. Remove half signal at Drummond. Install RRFB with pedestrian island near Drummond. ADA improvements and access management as needed.						
Existing MTIP Project Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
HISP	ZS30	Federal	2018		\$ 441,400				\$ 441,400
STBG-State	Z240	Federal	2018		\$ 1,023,905				\$ 1,023,905
State	Match	State	2018		\$ 117,191				\$ 117,191
STBG-State	Z240	Federal	2018			\$ 111,612			\$ 111,612
State	Match	State	2018			\$ 12,774			\$ 12,774
HSIP (100%)	ZS30	Federal	2018			\$ 76,000			\$ 76,000
HSIP (100%)	ZS30	Federal	2019				\$ 10,000		\$ 10,000
STBG-State	Z240	Federal	2019				\$ 8,928		\$ 8,928
State	Match	Federal	2019				\$ 1,022		\$ 1,022
HSIP (100%)	ZS30	Federal	2020					\$ 1,297,500	\$ 1,297,500
STBG-State	Z240	Federal	2020					\$ 2,989,540	\$ 2,989,540
State	Match	Federal	2020					\$ 342,166	\$ 342,166
Total:				\$ -	\$ 1,582,496	\$ 200,386	\$ 19,950	\$ 4,629,206	\$ 6,432,038
Notes:	<p>1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.</p> <p>2. STBG-State = Federal Surface Transportation Block Grant funds allocated out of the FAST Act and directly to ODOT. Formerly referred to as Surface Transportation Program (STP) funds. Same fund type and eligibility, but different name under the FAST Act.</p> <p>3. HSIP = Federal Highway Safety Improvement Program funding allocated to ODOT for system safety improvements. The 100% reference means the federal fund share is 100% and no local or state match is required.</p> <p>4. State = Generic state funds provided as the required match to the federal funds.</p>								

Amendment Summary
Proposed amended changes are stated on the next page

PROJECT #3 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
20413	70969	ODOT	US30BY (Lombard) Safety Extension	Roadway and Bridge	\$ 8,377,038
Project Description:			Road diet between MP 3.50 and N Wilbur. Signal upgrades at Fiske; Woolsey; Chautauqua; Wabash; Peninsular; and Greeley. Remove half signal at Drummond. Install RRFB with pedestrian island near Drummond. ADA improvements and access management as needed.		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Other (Utility Relocation)	Construction	Total
HSIP (100%)	ZS30	Federal	2018		\$ 1,582,496				\$ 1,582,496
STBG-State	Z240	Federal	2018		\$ 652,337				\$ 652,337
State	Match	State	2018		\$ 74,663				\$ 74,663
STBG-State	Z240	Federal	2018			\$ 1,204,523			\$ 1,204,523
State	Match	State	2018			\$ 137,863			\$ 137,863
HSIP (100%)	ZS30	Federal	2018			\$ 76,000			\$ 76,000
HSIP (100%)	ZS30	Federal	2019				\$ 10,000		\$ 10,000
NHPP-FAST	Z001	Federal	2019				\$ 8,928		\$ 8,928
State	Match	State	2019				\$ 1,022		\$ 1,022
NHPP (100%)	M001	Federal	2020					\$ 1,297,500	\$ 1,297,500
NHPP-FAST	Z001	Federal	2020					\$ 2,989,540	\$ 2,989,540
State	Match	State	2020					\$ 342,166	\$ 342,166
Total:				\$ -	\$ 2,309,496	\$ 1,418,386	\$ 19,950	\$ 4,629,206	\$ 8,377,038

Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
	2. STBG-State = Federal Surface Transportation Block Grant funds allocated out of the FAST Act and directly to ODOT. Formerly referred to as Surface Transportation Program (STP) funds. Same fund type and eligibility, but different name under the FAST Act.
	3. HSIP = Federal Highway Safety Improvement Program funding allocated to ODOT for system safety improvements. The 100% reference means the federal fund share is 100% and no local or state match is required.
	4. State = Generic state funds provided as the required match to the federal funds.

Amendment Summary

Through this amendment, additional needed funding is being programmed for PE and ROW as Key 20413 and Key 20415 are being combined into a single project

Exhibit A to Resolution 17-4856

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #4 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
20415	70971	ODOT	US30BY (Lombard) at Fenwick					Roadway and Bridge	\$ 1,217,896
Project Description:			Full signal upgrade; ADA improvements; and access management						
Existing MTIP Project Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
STBG-State	Z240	Federal	2018		\$ 264,804				\$ 264,804
State	Match	State	2018		\$ 30,308				\$ 30,308
STBG-State	Z240	Federal	2019			\$ 66,966			\$ 66,966
State	Match	State	2019			\$ 7,665			\$ 7,665
STBG-State	Z240	Federal	2019				\$ 4,464		\$ 4,464
State	Match	State	2019				\$ 511		\$ 511
STBG-State	Z240	Federal	2020					\$ 756,584	\$ 756,584
State	Match	State	2020					\$ 86,594	\$ 86,594
Total:				\$ -	\$ 295,112	\$ 74,631	\$ 4,975	\$ 843,178	\$ 1,217,896
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.								
	2. STBG-State = Federal Surface Transportation Block Grant funds allocated out of the FAST Act and directly to ODOT. Formerly referred to as Surface Transportation Program (STP) funds. Same fund type and eligibility, but different name under the FAST Act.								
	3. State = Generic state funds provided as the required match to the federal funds.								

Amendment Summary
Proposed changes are stated on the next page

PROJECT #54 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
20415	70971	ODOT	US30BY (Lombard) at Fenwick	Roadway and Bridge	\$ -
Project Description:			Full signal upgrade; ADA improvements; and access management.		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
STBG-State	Z240	Federal	2018		\$ -				\$ -
State	Match	State	2018		\$ -				\$ -
STBG-State	Z240	Federal	2019			\$ -			\$ -
State	Match	State	2019			\$ -			\$ -
STBG-State	Z240	Federal	2019				\$ -		\$ -
State	Match	State	2019				\$ -		\$ -
STBG-State	Z240	Federal	2020					\$ -	\$ -
State	Match	State	2020					\$ -	\$ -
Total:				\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
	2. NHPP = Federal National Highway Performance Program funds, state managed federal funds
	3. State = Generic state funds provided as the required match to the federal funds which for this project is 10.27%
	4. ADVCON = Advance Construction. A generic federal fund code used as a placeholder to identify future federal funds that will be committed to the project. Federal share = 89.73% with the required match set at 10.27%

Amendment Summary

Through this amendment, the project funding is being transferred and combined into Key 20413 also part of this amendment bundle. Key 201415 is then canceled from the 2018 MTIP.

Exhibit A to Resolution 17-4856

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #5 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
19552	70825	Portland	Clean Energy Public Access CNG Station (Portland)					Other	\$ 1,504,500
Project Description:			Construct a Compressed Natural Gas fueling station						
Existing MTIP Project Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary	Right	Construction	Other	Total
CMAQ-State		Federal	2015					\$ 531,020	\$ 531,020
Local	Match	Local	2015					\$ 60,778	\$ 60,778
Other	Overmatch	Local	2015					\$ 912,702	\$ 912,702
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,504,500	\$ 1,504,500

PROJECT #5 PROPOSED AMENDED CHANGES									
ODOT	MTIP	Lead	Project Name					Project	Project
19552	70825	Portland	Clean Energy Public Access CNG Station (Portland)					Other	\$ -
Project Description:			Construct a Compressed Natural Gas fueling station						
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary	Right	Construction	Other	Total
CMAQ-State		Federal	2015					\$ -	\$ -
Local	Match	Local	2015					\$ -	\$ -
Other	Overmatch	Local	2015					\$ -	\$ -
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment. 2. CMAQ-State = Federal Congestion Mitigation Air Quality (CMAQ) improvement funds that ODOT allocates and manages 3. Local = General local funds the lead agency provides for the required match to the federal funds 4. Other = Additional local funds the lead agency commits to the project above the required match. Also called "overmatch"								

Amendment Summary

The awarded CMAQ funding for the project was declined which essentially kills the project. It is now being formally removed from the 2018 MTIP and 2018 STIP through this amendment

Date: Friday, November 17 2017
 To: JPACT and Interested Parties
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: November 2017 MTIP Formal Amendment plus Approval Request of Resolution 17-4856


STAFF REPORT

FOR THE PURPOSE OF ADDING OR AMENDING EXISTING PROJECTS TO THE 2018-21 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM INVOLVING FIVE PROJECTS REQUIRING PROGRAMMING ADDITIONS, CORRECTIONS, OR CANCELLATIONS IMPACTING METRO, ODOT, AND PORTLAND (NV18-04-NOV)

BACKGROUND

What this is:

The November 2017 Formal MTIP Amendment bundle contains required changes and updates impacting Metro, ODOT, and Portland. With the programming actions completed for the HB2017 awarded projects completed, and the mandated clean-up/reconciliation of the 2018 MTIP and STIP essentially completed, the November 2017 Formal Amendment to the 2018 MTIP returns the programming emphasis to usual types of project changes or additions. However, there still will be continued clean-up actions as indicated by a couple of project cancellations in the November 2017 Formal amendment. The summary of projects included in the November 2017 Formal MTIP Amendment bundle is listed below:

2018-2021 Metropolitan Transportation Improvement Program Exhibit A to Resolution 17-4856			
 Metro			
Proposed November 2017 Formal Amendment Bundle Amendment Type: FORMAL, NV18-04-NOV Total Number of Projects: 5			
Project # ODOT Key	Lead Agency	Project Name	Required Changes
#1 19188	Metro	Metro Central Transfer Station: CNG Fueling	Project canceled from 2018 MTIP: The project will not move forward and be constructed as planned. It is being removed from the 2018 MTIP through this amendment
#2 21218 New	ODOT	I-5: Boone (Willamette River) Bridge	Adds only the PE phase to this bridge rehab project to the 2018 MTIP
#3 20413	ODOT	US30BY (Lombard) Safety Extension	Cost increase: Adds needed funding to the PE and ROW phases to address the phase funding shortage
#4 20415	ODOT	US30BY (Lombard) at Fenwick	Project requires a cost increase to address additional ADA compliance requirements and potentially will be combined into Key 20413 above. Key 20415 will be canceled assuming combination does occur. Otherwise Key 20415 will be removed as part of the November 2017 Amendment Bundle.
#5 19552	Portland	Clean Energy Public Access CNG Station (Portland)	Cancel project officially from 2018 MTIP and 2018 STIP. CMAQ funding declined. Project will not move forward.

What is the requested action?

TPAC requests JPACT approval and an approval recommendation of resolution 17-4856 to Metro Council enabling the five identified projects to be added, canceled, or amendment correctly into the 2018 MTIP and allowing final approval to then occur from USDOT.

1. Project: Metro Central Transfer Station: CNG Fueling	
Lead Agency:	Metro
ODOT Key Number:	19188
Project Description:	The project proposed to construct a Compressed Natural Gas fueling station to dispense renewable natural gas
What is changing?	Metro decided not to accept the State CMAQ funding and move forward with the project. The project was not carried over from the 2015 MTIP and STIP into the 2018 MTIP and STIP. This amendment officially deletes the project from the 2018 MTIP and STIP
Additional Details:	
Why a Formal amendment is required?	Per the FHWA STIP and MTIP amendment matrix, adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a full/formal amendment to be completed to add the project to the MTIP.
Total Programmed Amount:	The project programming decreases from \$1.853.547 to \$0
Added Notes:	Metro’s decision to stop the project occurred during summer. The amendment is a technical “clean-up” for auditing purposes

2. Project: I-5: Boone (Willamette River) Bridge	
Lead Agency:	ODOT
ODOT Key Number:	21218
Project Description:	On I-5 in Wilsonville at the Boone Bridge over the Willamette River, prepare shelf ready plans for future deck overlay, joint repairs and seismic retrofit.
What is Changing?	Through this amendment, the Preliminary Engineering phase and funding is being added to the 2018 MTIP
Additional Details:	
Why a Formal amendment?	Per the FHWA/FTA/ODOT/MPO Amendment Matrix, adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a full/formal amendment to be completed to add the project to the MTIP.
Total Programmed Amount:	The total programmed amount for the PE phase will be \$250,000. The estimated total project cost was not identified.
Other and Notes:	

3. Project: US30BY (Lombard) Safety Extension	
Lead Agency:	ODOT
ODOT Key Number:	20413
Project Description:	Road diet between MP 3.50 and N Wilbur. Signal upgrades at Fiske; Woolsey; Chautauqua; Wabash; Peninsular; and Greeley. Remove half signal at Drummond. Install RRFB with pedestrian island near Drummond. ADA improvements and access management as needed.
What is Changing?	Through this amendment, additional needed funding is being programmed for PE and ROW to address ADA compliance requirements. Key 20413 and Key 20415 are planned to be combined into a single project. It’s possible this could change. However, until a later decision reverses the planned combination between Key 20413 and 20415, the programming approach is to proceed with the assumption that the project combination will occur.

Additional Details:	Assuming the Key 20415 is combined into 20413, Key 20415 will be canceled from the MTIP
Why a Formal amendment?	The cost increase as a result of the combination into Key 20413 exceeds the 20% threshold. The subsequent cancelation of Key 20415 after it is combined into 20413 also requires a formal amendment.
Total Programmed Amount:	Key 20413 increases funding from \$6,432,038 to \$8,377,038
Other and Notes:	

4. Project:	US30BY (Lombard) at Fenwick
Lead Agency:	ODOT
ODOT Key Number:	20415
Project Description:	Full signal upgrade; ADA improvements; and access management
What is Changing?	Project is being combined into Key 20413. As a result, Key 20415 will be canceled from the 2018 MTIP
Additional Details:	
Why a Formal amendment?	Per the FHWA/FTA/ODOT/MPO Amendment Matrix, adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a full/formal amendment to be completed to add the project to the MTIP.
Total Programmed Amount:	Total programming for Key 20415 decreases from \$1,217,896 to \$0
Other and Notes:	OTC HB2017 project approval at their September 22, 2017 meeting

5. Project:	Clean Energy Public Access CNG Station (Portland)
Lead Agency:	Portland
ODOT Key Number:	70825
Project Description:	Construct a Compressed Natural Gas fueling station
What is Changing?	Portland declined the State CMAQ awarded to the project which effectively kills the project.
Additional Details:	Project is now officially being canceled from the 2018 MTIP
Why a Formal amendment?	Per the FHWA/FTA/ODOT/MPO Amendment Matrix, adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a full/formal amendment to be completed to add the project to the MTIP.
Total Programmed Amount:	Total programming decreases from \$1,504,500 to \$0.
Other and Notes:	

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. The programming factors include:

- Verification as required to programmed in the MTIP:
 - Awarded federal funds
 - Regionally significant project
 - Identified on and impacts Metro transportation modeling networks
 - Requires any sort of federal approvals
- Passes fiscal constraint verification:
 - Project eligibility for the use of the funds

- Proof and verification of funding commitment
- Requires the MPO to establish a documented process proving MTIP programming does not exceed the allocated funding for each year of the four year MTIP and for all funds identified in the MTIP.
- Passes RTP consistency review:
 - Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
 - RTP project cost consistent with requested programming amount in the MTIP
 - If a capacity enhancing projects – is identified in the approved Metro modeling network
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
 - Supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix
 - Provides conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP
 - Guidance: Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized.
 - Special programming exceptions periodically negotiated with USDOT as well.
- MPO responsibilities completion:
 - Completion of the required 30 day Public Notification period:
 - Project monitoring and expenditure of allocated funds
 - Acting on behalf of USDOT to provide the required forum and complete necessary discussions of proposed transportation improvements/strategies throughout the MPO.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the November 2017 Formal MTIP amendment will include the following:

<u>Action</u>	<u>Target Date</u>
● TPAC notification and approval recommendation.....	November 17, 2017
● Initiate the required 30-day public notification process.....	November 20, 2017
● Completion of public notification process.....	December 19, 2017
● JPACT approval and recommendation to Council.....	December 21, 2017
● Metro Council approval.....	January 11, 2018*

Note: The January Metro Council date is an estimate only at this time.

USDOT Approval Steps:

<u>Action</u>	<u>Target Date</u>
● Metro development of amendment narrative package	January 12 , 2018
● Amendment bundle submission to ODOT and USDOT	January 15, 2018
● ODOT clarification and approval.....	Mid February, 2018
● USDOT clarification and final amendment approval.....	Mid February 2018

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.

2. **Legal Antecedents:** Amends the 2018-2021 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 17-4817 on July 27, 2017 (For The Purpose of Adopting the Metropolitan Transportation Improvement Program for the Portland Metropolitan Area).
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

TPAC recommends the approval of Resolution 17-4856.

(TPAC approval recommendation on Friday, November 17, 2017)

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING OR AMENDING) RESOLUTION NO. 18-4858
EXISTING PROJECTS TO THE 2018-21)
METROPOLITAN TRANSPORTATION) Introduced by: “Chief Operating Officer
IMPROVEMENT PROGRAM INVOLVING SIX) Martha Bennett in concurrence with
PROJECTS REQUIRING PROGRAMMING) Council President Tom Hughes”
ADDITIONS, OR CORRECTIONS IMPACTING)
GRESHAM, KING CITY, AND ODOT (DE18-05-)
DEC))

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation related funding; and

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved the 2018-21 MTIP via Resolution 17-4817 on July 27, 2017; and

WHEREAS, JPACT and the Metro Council must approve any subsequent amendments to add new projects or substantially modify existing projects in the MTIP; and

WHEREAS, the U.S. Department of Transportation (USDOT) has issued clarified MTIP amendment submission rules and definitions for MTIP formal amendments and administrative modifications that both ODOT and all Oregon MPOs must adhere to which includes that all new projects added to the MTIP must complete the formal amendment process; and

WHEREAS, updated construction phase cost estimates revealed that the Gresham East Metro Connections ITS project requires additional funding in the amount of \$555,000 to cover required overhead and project contingency needs which are being addressed through this amendment; and

WHEREAS, cost increases to King City’s “OR99W: Beef Bend Rd to SW Durham Rd” sidewalk installation project required the project to be re-scoped and adjust the project limits to keep the project within the available project budget limits resulting in a sidewalk gap-fill project with a name and limits change to be “OR99W: SW Royalty Parkway to SW Durham Rd (King City)”; and

WHEREAS, ODOT identified \$940,000 of obligated right-of-way, but unexpended project funding was available from their “OR21/224 Sunrise Corridor: 122nd Ave to 172nd Ave” project of which \$330,000 will be applied to Preliminary Engineering (PE) phase needs in their “OR224: (Milwaukie Expressway – SE Rusk Rd to I-205” project and \$910,000 will be applied for PE needs to their “I-205: OR224 (Sunrise Expressway) to Sunnybrook Blvd)” project; and

WHEREAS, project budget constraints required ODOT’s OR99E Rockfall mitigation project to reduce its project limits to be Oregon City Tunnel to Old Canemah Park with an existing scope to inspect and repair existing mesh, scale slop behind mesh removing loose rock vegetation, address rock bolting as needed and clear the catchment/roadside ditch area; and

WHEREAS, all amended projects were evaluated against six revised MTIP review factors to ensure all requested changes and additions can be accomplished legally through the MTIP amendment process; and

WHEREAS, the MTIP review factors included project eligibility/proof of funding, RTP consistency with the financially constrained element, consistency with RTP goals and strategies, determination of amendment type, inclusion in the Metro transportation regional models, determination of Regional Significance, fiscal constraint verification, and compliance with MPO MTIP federal management responsibilities; and

WHEREAS, the MTIP's financial constraint finding is maintained as all projects proof of funding has been verified; and

WHEREAS, no negative impacts to air conformity will exist as a result of the changes completed through the December 2017 Formal MTIP Amendment; and

WHEREAS, all projects included in the December 2017 Formal MTIP Amendment successfully completed a required 30-day public notification/opportunity to comment period without any significant issues raised; and

WHEREAS, TPAC received their notification and recommended approval on December 15, 2017 and approved the amendment recommendation to JPACT; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on January 18, 2018 to formally amend the 2018-21 MTIP to include the December 2017 Formal Amendment bundle consisting of six projects.

ADOPTED by the Metro Council this ____ day of _____ 2018.

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

2018-2021 Metropolitan Transportation Improvement Program
 Exhibit A to Resolution 18-4858



Proposed December 2017 Formal Amendment Bundle			
Amendment Type: FORMAL, DE18-05-DEC			
Total Number of Projects: 6			
ODOT Key	Lead Agency	Project Name	Required Changes
#1 18306	Gresham	East Metro Connections ITS	Add \$610,000 of agency local funds to the construction phase to address a revised construction phase cost increase and adding funds in support of the Other phase needs.
#2 18807	King City	OR99EW: SW Beef Bend Rd - SW Durham Rd (King City) OR99W: SW Royalty Parkway - SW Durham Rd (King City)	Changing name, reducing scope to include only one sidewalk infill, reduce ROW funding, reduce the construction phase funding (from the reduced scope), and moving the savings back to PE
#3 19719	ODOT	OR212/224 Sunrise Corridor: 122nd Ave - 172nd Ave	Splitting unexpended funding from this project from the 2015 MTIP and STIP project to two projects being re-added to the 2018 MTIP and STIP with the following changes: Splitting existing unexpended funding with \$330k committed to Key 19720 and \$910k committed to Key 19721. Reduced obligated funding in Key 19719 decreases key 19719 to \$3,400,000. Key 19719 remains as a prior obligated project and will not show up as a active project
#4 19720 New	ODOT	OR224 (Milwaukie Expressway): SE Rusk Rd - I-205	Re-adding project to the 2018 MTIP enabling PE phase to be increased
#5 19721 New	ODOT	I-205: OR224 (Sunrise Expressway) - Sunnybrook Blvd	Splitting \$990k from Key 19719 and adding it to Key 19721 for additional PE phase requirements
#6 18769	ODOT	OR99E: Rockfall Mitigation MP 12.62 - MP14.06 OR99E: Rockfall - Oregon City Tunnel to Old Canemah Park	Changing project limits greater than 0.25 miles total and adjusting project name and description per updated scope

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #1 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
18306	70609	Gresham	East Metro Connections ITS					Local Road	\$ 1,075,000
Project Description:			Update traffic signal hardware and communications. Install changeable message sign.						
Existing MTIP Project Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other (ConOps & Svs Test)	Total
CMAQ-State	Z400	Federal	2015		\$ 179,460				\$ 179,460
Local	Match	Local	2015		\$ 20,540				\$ 20,540
NHS	Q050	Federal	2015		\$ 118,594				\$ 118,594
Local	Match	Local	2015		\$ 13,574				\$ 13,574
State STP-FLX	M24E	Federal	2015		\$ 20,487				\$ 20,487
Local	Match	Local	2015		\$ 2,345				\$ 2,345
ADVCON	ACPO	Federal	2018				\$ 464,161		\$ 464,161
Local	Match	Local	2018				\$ 53,125		\$ 53,125
Other	Overmatch	Local	2018				\$ 127,714		\$ 127,714
CMAQ-State	Z400	Federal	2018					\$ 67,298	\$ 67,298
Local	Match	Local	2018					\$ 7,702	\$ 7,702
Total:				\$ -	\$ 355,000	\$ -	\$ 645,000	\$ 75,000	\$ 1,075,000
Notes:	<p>1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.</p> <p>2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.</p> <p>3. CMAQ-State = federal Congestion Mitigation Air Quality improvement funds with the allocation now managed by ODOT</p> <p>4. NHS = Federal National Highway System funds allocated to and managed by ODOT</p> <p>5. State STP-FLX = Federal Surface Transportation Program (Flex) allocated and managed by ODOT</p> <p>6. Local = local funds the lead agency commits to the project as part of the required match to the awarded federal funds.</p> <p>7. ADVCON = State Advance Construction funds used as a placeholder for a specific future federal fund code to be assigned to the project</p>								
<p>Amendment Summary</p> <p>Above reflects current pre-amendment project programming. Proposed amended changes are stated on the next page</p>									

PROJECT #1 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name				Project Type	Project Cost	
18306	70609	Gresham	East Metro Connections ITS				Local Road	\$ 1,685,000	
Project Description: Update traffic signal hardware and communications. Install changeable message sign.									
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
CMAQ-State	Z400	Federal	2015		\$ 179,460				\$ 179,460
Local	Match	Local	2015		\$ 20,540				\$ 20,540
NHS	Q050	Federal	2015		\$ 118,594				\$ 118,594
Local	Match	Local	2015		\$ 13,574				\$ 13,574
State STP-FLX	M24E	Federal	2015		\$ 20,487				\$ 20,487
Local	Match	Local	2015		\$ 2,345				\$ 2,345
ADVCON	ACPO	Federal	2018				\$ 464,161		\$ 464,161
Local	Match	Local	2018				\$ 53,125		\$ 53,125
Other	Overmatch	Local	2018				\$ 127,714		\$ 127,714
Other	Overmatch	Local	2018				\$ 514,850	\$ 95,150	\$ 610,000
CMAQ-State	Z400	Federal	2018					\$ 67,298	\$ 67,298
Local	Match	Local	2018					\$ 7,702	\$ 7,702
Total:				\$ -	\$ 355,000	\$ -	\$ 1,159,850	\$ 170,150	\$ 1,685,000
Notes:	<p>1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.</p> <p>2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.</p> <p>3. CMAQ-State = federal Congestion Mitigation Air Quality improvement funds with the allocation now managed by ODOT</p> <p>4. NHS = Federal National Highway System funds allocated to and managed by ODOT</p> <p>5. State STP-FLX = Federal Surface Transportation Program (Flex) allocated and managed by ODOT</p> <p>6. Local = local funds the lead agency commits to the project as part of the required match to the awarded federal funds.</p> <p>7. ADVCON = State Advance Construction funds used as a placeholder for a specific future federal fund code to be assigned to the project</p>								

Amendment Summary

An additional \$610,000 of local funds are being added to the construction and Other phases to address a revised construction phase cost increase. Part of the increase requires the times to be separated out of the construction phase and programmed/expended through the Other phase

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #2 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
18807	70769	King City	OR99W: SW Beef Bend Rd - SW Durham Rd					Highway	\$ 1,141,020
Project Description:			Install sidewalk on the west side of OR99W						
Existing MTIP Project Fund Programming by Phase - AS PROGRAMMED IN THW 2015 MTIP AND STIP BEFORE ROW OBLIGATION									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
Redist	Z030	Federal	2015		\$ 133,787				\$ 133,787
Local	Match	Local	2015		\$ 15,313				\$ 15,313
Other	Overmatch	Local	2015		\$ 15,313				\$ 15,313
ADVCON	ACPO	Federal	2018			\$ 26,919			\$ 26,919
Local	Match	Local	2018			\$ 3,081			\$ 3,081
State STP-FLX	M240	Federal	2018				\$ 753,133		\$ 753,133
Local	Match	Local	2018				\$ 86,199		\$ 86,199
Other	Overmatch	Local	2018				\$ 107,275		\$ 107,275
Total:				\$ -	\$ 164,413	\$ 30,000	\$ 946,607	\$ -	\$ 1,141,020
Notes:	<p>1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.</p> <p>2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.</p> <p>3. Redist = Federal funds eligible for Redistribution by ODOT</p> <p>4. ADVCON = Federal advance construction fund type code used as a placeholder until the specific federal funding is determined</p> <p>5. State STP-FLX = Federal Surface Transportation Program funding allocated to ODOT</p> <p>6. Local = Local funds provided by the lead agency as the match requirement against the federal funds.</p> <p>7. Other = Additional local funds beyond the required match requirement the lead agency provides to the project. Also called "overmatch" funding.</p>								

Amendment Summary
Project changes are stated on the next page

PROJECT #2 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
18807	70769	King City	OR99W: SW Beef Bend Rd - SW Durham Rd OR99W: SW Royalty Parkway - SE Durham Rd (King City)	Highway	\$ 1,141,020
Project Description:			Install sidewalk on the west side of OR99W- On OR99W near King City, fill sidewalk gaps to connect the City to OR99W corridor to increase access to transportation, improve travel options, promote vitality within the town center and enhance overall livability.		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
State STP-FLX	M240	Federal	2015		\$ 222,084				\$ 222,084
Local	Match	Local	2015		\$ 25,418				\$ 25,418
State STP-FLX	M24E	Federal	2015		\$ 133,787				\$ 133,787
Local	Match	Local	2015		\$ 15,313				\$ 15,313
ADVCON	ACP0	Federal	2018			\$ 10,768			\$ 10,768
Local	Match	Local	2018			\$ 1,232			\$ 1,232
State STP-FLX	M240	Federal	2018				\$ 547,200		\$ 547,200
Local	Match	Local	2018				\$ 62,630		\$ 62,630
Other	Overmatch	Local	2018				\$ 122,588		\$ 122,588
Total:				\$ -	\$ 396,602	\$ 12,000	\$ 732,418	\$ -	\$ 1,141,020

- Notes:
1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
 2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.
 3. Redist = Federal funds eligible for Redistribution by ODOT
 4. ADVCON = Federal advance construction fund type code used as a placeholder until the specific federal funding is determined
 5. State STP-FLX = Federal Surface Transportation Program funding allocated to ODOT
 6. Local = Local funds provided by the lead agency as the match requirement against the federal funds.
 7. Other = Additional local funds beyond the required match requirement the lead agency provides to the project. Also called "overmatch" funding.

Amendment Summary

Project name and description are updated based on revised project limits and scope. Multiple fund swaps are completed reflecting actual PE obligations for the project. ROW and construction phase decreases with savings added back to PE phase to address PE phase funding shortfall. Net change is the total project cost remains unchanged.

Project Number 3

Key 19719 - OR212/224 Sunrise Corridor - 122nd to 172nd Ave
Project programming in the 2015-18 STIP and 2015-18 MTIP

2015-2018 STIP Approved

2015-2018 STIP Approved

CLACKAMAS

Name: OR212/224 SUNRISE CORRIDOR: 122ND AVE - 172ND AVE

Key: 19719

Description: Funding for RW protective purchases

Region: 1

MPO: Non-MPO

Work Type: MODERN

Applicant: ODOT

Status: FUNDED THROUGH RIGHT OF WAY ACQUISITION

Location(s)

Mileposts	Length	Route	Highway	ACT	County(s)
6.55 to 8.19	1.64	OR-212	CLACKAMAS	REGION 1 ACT	CLACKAMAS
0.03 to 1.03	1.00	OR-224	CLACKAMAS	REGION 1 ACT	CLACKAMAS

Approved STIP Amounts

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	STIP Total
Total			\$5,000,000.00				\$5,000,000.00

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year			2016				
Total			\$4,650,000.00				\$4,650,000.00
Fund 1			B4A0 \$4,650,000.00				
Match							

Most Recent Amendment Approved

Amendment No: 15-18-2869

Approval Date: 9/5/2017

Requested Action: Reduce RW to \$4,640,000 by splitting \$270,000 to K19720 and \$90,000 to K19721.

Footnote:

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #3 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name				Project Type	Project Cost	
19719	70846	ODOT	OR212/224 Sunrise Corridor: 122nd Ave - 172nd Ave				Highway	\$	4,640,000
Project Description:			Funding for RW protective purchases						
Existing MTIP Project Fund Programming by Phase - AS PROGRAMMED IN THW 2015 MTIP AND STIP BEFORE ROW OBLIGATION									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ConOps & Svs Test)	Total
HB 2001	B4A0	State	2016			\$ 4,640,000			\$ 4,640,000
									\$ -
Total:			\$ -	\$ -	\$ 4,640,000	\$ -	\$ -	\$ 4,640,000	
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.								
	2. HB 2001 = State funds originating from approved House Bill 2001. Official name = HB2001B Bond Funds - JTA								

Amendment Summary

- The above reflects programming originally in the 2015 MTIP and 2015 STIP. The state HB2001 funds were obligated to the project (allowing expenditures to begin).
- The official correct amount for the ROW phase is \$4,640,000 and not \$4,650,000.
- The funds were obligated on 3/10/2016 (during early FFY 2016). The Expenditure Authority (EA) R1935000.
- Since the 2016 obligation date, not all obligated funds have been expended.
- The Oregon Transportation Commission during November 2017 approved a total of \$1,240,000 to be split from Key 19719 (this project) and then applied to two other projects (Keys 19720 and 19721 - also part of this amendment).
- Because the remaining funds left in Key 19719 (this project) are obligated, the project will not be shown as an active project in the 2018 MTIP.
- The adjustments are included as part of the Public Notification tables and to meet fiscal constraint requirements.
- The Proposed Amendment Changes table on the next page reflect the logic and reduction of splitting the \$1,240,000 from Key 19719 and re-allocating it to Keys 19720 and 19721.

PROJECT #3 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name				Project Type	Project Cost	
19719	70846	ODOT	OR212/224 Sunrise Corridor: 122nd Ave - 172nd Ave				Highway	\$ 3,400,000	
Project Description:		Funding for RW protective purchases							
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
HB 2001	B4A0	State	2016			\$ 20,000			\$ 20,000
State STBG-FLX	Z240	Federal	2016			\$ 3,032,874			\$ 3,032,874
State	Match	State	2016			\$ 347,126			\$ 347,126
Total:			\$ -	\$ -	\$ 3,400,000	\$ -	\$ -	\$ 3,400,000	
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment. 2. HB 2001 = State funds originating from approved House Bill 2001. Official name = HB2001B Bond Funds - JTA 3. State STBG-FLX = Federal Surface Transportation Block Grant Program funding allocated and managed by ODOT 4. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.								

Amendment Summary

\$1,240,000 of unexpended HB2001 funds are being split off from this project and will be applied to Keys 19720 and 19721. The remaining HB 2001 funds (except for \$20k) have been removed and replaced with federal Surface Transportation Block Grant funds. OTC approval during their November 2017 meeting.

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #4 EXISTING MTIP PROGRAMMING - None **New Project**

PROJECT #4 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
19720	70845	ODOT	OR224 (Milwaukie Expressway): SE Rusk Rd - I-205	Highway	\$ 2,100,000
Project Description:			Add a westbound lane and improve the signals		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Other (PE Prior Obligated)	Construction	Total
HB 2001	B4A0	State	2016				\$ 1,770,000		\$ 1,770,000
HB 2001	B4A0	State	2018		\$ 330,000				\$ 330,000
Total:				\$ -	\$ 330,000	\$ -	\$ 1,770,000	\$ -	\$ 2,100,000

Notes: 1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
 2. HB 2001 = State funds originating from approved House Bill 2001. Official name = HB2001B Bond Funds - JTA

3. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.

Amendment Summary

\$330,000 of HB 2001 Bond Funds are being added to the PE phase in support of continue PE work activities. The \$330,000 originates from Key 19719. The funding has been split off of 19719 and combined into this project. OTC approval during November 2017.

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #5 EXISTING MTIP PROGRAMMING - None **New Project**

PROJECT #5 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
19721	70844	ODOT	I-205: OR224 (Sunrise Expressway) - Sunnybrook Blvd	Highway	\$ 1,500,000

Project Description: Design to add a northbound auxiliary lane from westbound Sunrise Expressway entrance ramp to Sunnybrook Blvd exit ramp.

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Other (PE Prior Obligated)	Construction	Total
HB 2001	B4A0	State	2016				\$ 529,407		\$ 529,407
State	Match	State	2016				\$ 60,593		\$ 60,593
HB 2001	B4A0	State	2018		\$ 430,000				\$ 430,000
NHPP-FAST	Z001	Federal	2018		\$ 442,626				\$ 442,626
State	Match	State	2018		\$ 37,374				\$ 37,374
Total:				\$ -	\$ 910,000	\$ -	\$ 590,000	\$ -	\$ 1,500,000

- Notes:
1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
 2. HB 2001 = State funds originating from approved House Bill 2001. Official name = HB2001B Bond Funds - JTA
 3. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.
 4. New HB2001 and swap with NHPP originate from splitting funds from Key 19719.
 5. NHPP-FAST = Federal National Highway Performance Program funds originating from the FAST Act and allocated to ODOT.
 6. State = Required generic state funds committed to the project in support of federal fund match requirements.

Amendment Summary

\$910,000 of HB 2001 and NHPP funding with match are being added to the PE phase in support of continue PE work activities. The \$910,000 originates from Key 19719. The funding has been split off of 19719 and combined into this project. OTC approval was required and occurred during their November 2017 meeting

Exhibit A to Resolution 18-4858

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment

Action: Amend the MTIP to increase or adjust required funding and add new projects for the following projects



PROJECT #6 EXISTING MTIP PROGRAMMING										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
18769	70801	ODOT	OR99E Rockfall Mitigation MP 12.62- MP 14.06					Highway	\$ 1,889,000	
Project Description:		Rockfall Mitigation								
Existing MTIP Project Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total	
ADVCON	ACPO	Federal	2016		\$ 193,817				\$ 193,817	
State	Match	State	2016		\$ 22,183				\$ 22,183	
ADVCON	ACPO	Federal	2018				\$ 1,456,318		\$ 1,456,318	
State	Match	State	2018				\$ 166,682		\$ 166,682	
ADVCON	ACPO	Federal	2018					\$ 44,865	\$ 44,865	
State	Match	State	2018					\$ 5,135	\$ 5,135	
Total:					\$ -	\$ 216,000	\$ -	\$ 1,623,000	\$ 50,000	\$ 1,889,000
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.									
	2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.									
	3. State STBG = Federal Surface Transportation Block Grant funding allocated directly to ODOT.									
	4. State = ODOT state funds added to the project phase as their required match to the federal fund type STBG									

Amendment Summary
 Proposed amended changes are stated on the next page

PROJECT #6 PROPOSED AMENDED CHANGES									
ODOT Key	MTIP ID	Lead Agency	Project Name				Project Type	Project Cost	
18769	70801	ODOT	OR99E: Rockfall Mitigation MP 12.62—MP14.06 OR99E:Rockfall - Oregon City Tunnel to Old Canemah Park				Highway	\$ 1,889,000	
Project Description:			Rockfall Mitigation On OR99E near Oregon City , inspect and repair mesh. Scale slope behind mesh removing loose rock and vegetation. Rock bolting as needed and clear catchment area / roadside ditch						
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total
ADVCON	ACP0	Federal	2016		\$ 89,730				\$ 89,730
State	Match	State	2016		\$ 10,270				\$ 10,270
State STP	M240	Federal	2016		\$ 193,817				\$ 193,817
State	Match	State	2016		\$ 22,183				\$ 22,183
ADVCON	ACP0	Federal	2018				\$ 1,366,588		\$ 1,366,588
State	Match	State	2018				\$ 156,412		\$ 156,412
ADVCON	ACP0	Federal	2018					\$ 44,865	\$ 44,865
State	Match	State	2018					\$ 5,135	\$ 5,135
Total:				\$ -	\$ 316,000	\$ -	\$ 1,523,000	\$ 50,000	\$ 1,889,000
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.								
	2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the 2018 MTIP. They are shown above in their programming years in the shaded fields.								
	3. ADVCON = Advance Construction. A generic federal fund code used as a placeholder to identify future federal funds that will be committed to the project. Federal share = 89.73% with the required match set at 10.27%								
	4. State = ODOT state funds added to the project phase as their required match to the federal fund type ADVCON.								

Amendment Summary

Project name and description changed to reflect updated scope and new limits. PE phase reduces use of Advance Construction and inserts State STP in it's place to address funding shortfall in PE. Construction phase decreased as a result of the smaller project limits. Overall, the total project cost remains unchanged.

Memo

Date: Friday, December 29, 2017
 To: JPACT and Interested Parties
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: December 2017 MTIP Formal Amendment plus Approval Request of Resolution 18-4858

STAFF REPORT

FOR THE PURPOSE OF ADDING OR AMENDING EXISTING PROJECTS TO THE 2018-21 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM INVOLVING SIX PROJECTS REQUIRING PROGRAMMING ADDITIONS, CORRECTIONS, OR CANCELLATIONS IMPACTING GRESHAM, KING CITY, AND ODOT (DE18-05-DEC)

BACKGROUND

What this is:

The December 2017 Formal MTIP Amendment bundle contains required changes and updates impacting Gresham, King City, and ODOT. Six projects are included in the amendment bundle and are summarized in the below table:

2018-2021 Metropolitan Transportation Improvement Program Exhibit A to Resolution 18-4858			
Proposed December 2017 Formal Amendment Bundle Amendment Type: FORMAL, DE18-05-DEC Total Number of Projects: 6			
ODOT Key	Lead Agency	Project Name	Required Changes
#1 18306	Gresham	East Metro Connections ITS	Add \$570,000 of agency local funds to the construction phase to address a revised construction phase cost increase.
#2 18807	King City	OR99EW: SW Beef Bend Rd – SW Durham Rd (King City) OR99W: SW Royalty Parkway - SW Durham Rd (King City)	Changing name, reducing scope to include only one sidewalk infill, reduce ROW funding, reduce the construction phase funding (from the reduced scope), and moving the savings back to PE
#3 19719	ODOT	OR212/224 Sunrise Corridor: 122nde Ave - 172nd Ave	Splitting unexpended funding from this project from the 2015 MTIP and STIP project to two projects being re-added to the 2018 MTIP and STIP with the following changes: Splitting existing unexpended funding with \$330k committed to Key 19720 and \$910k committed to Key 19721. Reduced obligated funding in Key 19719 decreases key 19719 to \$3,400,000. Key 19719 remains as a prior obligated project and will not show up as a active project
#4 19720 New	ODOT	OR224 (Milwaukie Expressway): SE Rusk Rd - I-205	Re-adding project to the 2018 MTIP enabling PE phase to be increased
#5 19721 New	ODOT	I-205: OR224 (Sunrise Expressway) - Sunnybrook Blvd	Splitting \$990k from Key 19719 and adding it to Key 19721 for additional PE phase requirements
#6 18769	ODOT	OR99E: Rockfall Mitigation MP 12.62 – MP14.06 OR99E: Rockfall - Oregon City Tunnel to Old Canemah Park	Changing project limits greater than 0.25 miles total and adjusting project name and description per updated scope

What is the requested action?

Staff is providing TPAC notification of the formal amendment and requesting their approval recommendation to JPACT for resolution 18-4858 to Metro Council enabling the six identified projects to be amended correctly into the 2018 MTIP, and then allowing final approval to occur from USDOT.

A detailed summary of the six projects being amended is provided in the below tables:

1. Project: East Metro Connections ITS	
Lead Agency:	Gresham
ODOT Key Number:	18306
	MTIP ID Number: 70609
Project Description:	Update traffic signal hardware and communications. Install changeable message sign. Note: Through the Public Comment/Notification period, Metro received a technical comment from the city of Gresham requesting a change to the proposed project programming as presented to the TPAC due to a second identified cost increase to the project. The second cost increase to the project has been requested to be included as part of the overall formal amendment.
What is changing?	Updated cost estimates as final design for the project was being completed revealed increases to the construction phase, required increases to be included for necessary administrative overhead, and project contingencies. The summary of the cost increases can be attributed a project moving from general scope and design objectives that was refined through the normal federal NEPA and final design process. The impact of the construction, overhead, and contingency cost increases to the project adds an additional \$610,000 to the total project cost. The revised total project cost is now \$1,685,000. Note: The cost increase for this Intelligent Transportation System project is not unusual for ITS projects. Due to changing technology and the requirement to prove their concept of operation as a beneficial improvement to the transportation system, ITS projects can easily evolve into much more complicated, technically constrained, and costly projects than first proposed. The city of Gresham has the local funding to cover the cost increase and commit to the project. Rather than waiting to accomplish another cost increase amendment to the project, the city of Gresham requested the revised cost increase to be included as part the current formal amendment to avoid further delays to implement the project. As part of the public comment process, staff have reviewed and approved Gresham's request.
Additional Details:	The city of Gresham is adding local funds to the construction and Other phases to address the cost increase and ensure the construction phase is not considered short-programmed.
Why a Formal amendment is required?	Per the FHWA STIP and MTIP amendment matrix, Projects with a total project cost of \$1 million or greater that experience a cost increase above 20% require a formal MTIP amendment to complete the cost increase for the project.
Total Programmed Amount:	The amendment adds a total of \$570,000 to the construction phase. The project programming amount increases from \$1,075,000 to \$1,685,000
Added Notes:	The additional local funds committed to the project will ensure the project can implement and delivery the full project scope without requiring any changes.

2. Project: OR99W: SW Beef Bend Rd - SW Durham Rd OR99W: SW Royalty Parkway - SW Durham Rd (King City)	
Lead Agency:	King City
ODOT Key Number:	18807
	MTIP ID Number: 70769
Project Description:	Install sidewalk on the west side of OR99W On OR99W near King City, fill sidewalk gaps to connect the City to OR99W corridor to increase access to transportation, improve travel options, promote vitality within the town center and enhance overall livability.

What is changing?	Due to a revision in the project limits, the project scope is being modified. This results in a required updated to the project name and description. Project funding remains unchanged. Scope reduction now only includes sidewalk infill between SW Royalty Pkwy and SW Durham Rd (MP 11.21 to MP11.36). Additional funds were not available to address the cost increase resulting in the revised limits and scope of work.
Additional Details:	As a result of the scope adjustment, the Right of Way phase also decreases from \$30,000 to \$12,000
Why a Formal amendment is required?	Per the FHWA STIP and MTIP amendment matrix, major scope changes or project limit changes beyond 0.25 miles require a formal amendment to complete the changes.
Total Programmed Amount:	The amendment swaps out several funds with State STP funds. Overall, the project programming amount remains unchanged at \$1,141,020
Added Notes:	

Changes being made to Key 19719 impact Keys 19720 and 19721 that are also part of this amendment

3. Project: OR212/224 Sunrise Corridor: 122nd Ave - 172nd Ave	
Lead Agency:	ODOT
ODOT Key Number:	19719 MTIP ID Number: 70846
Project Description:	Funding for RW protective purchases
What is changing?	Unexpended obligated Right of Way phase funding that is not currently required for this project is being de-obligated and shifted to Keys 19720 and 19721 (next two projects). The de-obligated funding is being reprogrammed to the PE phases of project Keys 19720 and 19721. A total of \$1,240,000 is being shifted from Key 19719 to Key 19720 (which adds \$330,000 to the PE phase) and to Key 19721 (which adds \$910,000 to the PE phase)
Additional Details:	Because the ROW phase obligation occurred in 2016, the project was not carried over into the 2018 MTIP. However, the changes to Keys 19720 and 19721 needs to include this project to show the audit trail of how the funds were shifted. Key 19719 (this project) will remain as a prior obligated project and not show up in the 2018 MTIP as an active project.
Why a Formal amendment is required?	Because Keys 19720 and 19721 are being re-added to the MTIP, they are considered to be new projects. Per the FHWA STIP and MTIP amendment matrix, new projects being added to the MTIP require a formal amendment. Since Key 19719 is part of the re-add process, it must proceed as well as a formal amendment.
Total Programmed Amount:	The amendment reduces the total programmed amount from \$4,640,000 to \$3,400,000
Added Notes:	De-obligation and transfer approval from Key 19719 to Keys 19720 and 19721 occurred by OTC at their November 2017 meeting

4. Project: OR224 (Milwaukie Expressway): SE Rusk Rd - I-205	
Lead Agency:	ODOT
ODOT Key Number:	19720 MTIP ID Number: 70845
Project Description:	Add a westbound lane and improve the signals
What is changing?	The project receives an additional \$330,000 from Key 19719 to continue PE activities. The PE phase was initially programmed with \$1,770,000 of HB 2001 JTA state funds which were obligated back in 2016. They are shown in the Other phase in Exhibit A/Public Notification Tables. The additional \$330,000 is shown in 2018 in the year it will be obligated in support of the project.
Additional Details:	Funding is being added only to the PE phase to continue with PE phase work
Why a Formal amendment is required?	Since the project obligated the phase as part of the 2015 MTIP and no new funds were identified for the project, it was not carried over into the 2018 MTIP. With the addition of the new PE funds in FY 2018, the project needs to be re-added to the 2018 MTIP. Per the FHWA Amendment Matrix, adding a new project to the MTIP

	requires a formal amendment
Total Programmed Amount:	The amendment increase the total programmed amount from \$1,770,000 to \$2,100,000
Added Notes:	De-obligation and transfer approval from Key 19719 to Key 19720 occurred by OTC at their November 2017 meeting

5. Project: I-205: OR224 (Sunrise Expressway) – Sunnybrook Blvd	
Lead Agency:	ODOT
ODOT Key Number:	19721
MTIP ID Number:	70844
Project Description:	Design to add a northbound auxiliary lane from westbound Sunrise Expressway entrance ramp to Sunnybrook Blvd exit ramp.
What is changing?	The project receives an additional \$910,000 from Key 19719 to continue PE activities. The PE phase was initially programmed with \$590,00 of HB 2001 JTA state funds which were obligated back in 2016. They are shown in the Other phase in Exhibit A/Public Notification Tables. The additional \$910,000 is shown in 2018 in the year it will be obligated in support of the project. The new funding is split between HB 2001 funds and National Highway Performance Program Funds (NHPP)
Additional Details:	Funding is being added only to the PE phase to continue with PE phase work
Why a Formal amendment is required?	Since the project obligated the phase as part of the 2015 MTIP and no new funds were identified for the project, it was not carried over into the 2018 MTIP. With the addition of the new PE funds in FY 2018, the project needs to be re-added to the 2018 MTIP. Per the FHWA Amendment Matrix, adding a new project to the MTIP requires a formal amendment
Total Programmed Amount:	The amendment increases the total programmed amount from \$590,000 to \$1,500,000
Added Notes:	De-obligation and transfer approval from Key 19719 to Key19721 occurred by OTC at their November 2017 meeting

6. Project: OR99E Rockfall Mitigation MP 12.62- MP 14.06 OR99E:Rockfall - Oregon City Tunnel to Old Canemah Park	
Lead Agency:	ODOT
ODOT Key Number:	18769
MTIP ID Number:	70801
Project Description:	Rockfall Mitigation On OR99E near Oregon City, inspect and repair mesh. Scale slope behind mesh removing loose rock and vegetation. Rock bolting as needed and clear catchment area/roadside ditch
What is changing?	Project limits have been reduced and adjusted due to scope update. This results in a required name change and description update. The total project cost remains unchanged but STP is now committed to the PE phase to address a PE funding shortfall.
Additional Details:	The change in limits and scope reduces the construction phase cost. The savings are being shifted back to the PE phase to cover the PE phase shortfall
Why a Formal amendment is required?	Since the project obligated the phase as part of the 2015 MTIP and no new funds were identified for the project, it was not carried over into the 2018 MTIP. With the addition of the new PE funds in FY 2018, the project needs to be re-added to the 2018 MTIP. Per the FHWA Amendment Matrix, adding a new project to the MTIP requires a formal amendment
Total Programmed Amount:	The amendment results in no change to the programmed amount for the project. The project remains programmed at \$1,889,000.
Added Notes:	

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. The programming factors include:

- Verification as required to programmed in the MTIP:
 - Awarded federal funds and is considered a transportation project
 - Identified as a regionally significant project.
 - Identified on and impacts Metro transportation modeling networks.
 - Requires any sort of federal approvals which the MTIP is involved.
- Passes fiscal constraint verification:
 - Project eligibility for the use of the funds
 - Proof and verification of funding commitment
 - Requires the MPO to establish a documented process proving MTIP programming does not exceed the allocated funding for each year of the four year MTIP and for all funds identified in the MTIP.
- Passes the RTP consistency review:
 - Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
 - RTP project cost consistent with requested programming amount in the MTIP
 - If a capacity enhancing project – is identified in the approved Metro modeling network
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
 - Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
 - Adheres to conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP.
 - Is eligible for special programming exceptions periodically negotiated with USDOT as well.
 - Programming determined to be reasonable of phase obligation timing and is consistent with project delivery schedule timing.
- MPO responsibilities completion:
 - Completion of the required 30 day Public Notification period:
 - Project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.
 - Acting on behalf of USDOT to provide the required forum and complete necessary discussions of proposed transportation improvements/strategies throughout the MPO.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the December 2017 Formal MTIP amendment will include the following:

- | <u>Action</u> | <u>Target Date</u> |
|---|-------------------------|
| • Initiate the required 30-day public notification process..... | December 11, 2017 |
| • TPAC notification and approval recommendation..... | December 15, 2017 |
| • Completion of public notification process..... | January 12, 2018 |
| • JPACT approval and recommendation to Council..... | January 18, 2018 |
| • Metro Council approval..... | Early February, 2018* |

Note: The February Metro Council date for the December 2017 Formal Amendment item could occur on February 1, 2018 or February 8, 2018. The final decision on which agenda it will be added will be made after the JPACT meeting

USDOT Approval Steps:

<u>Action</u>	<u>Target Date</u>
• Metro development of amendment narrative package	NLT February 9 , 2018
• Amendment bundle submission to ODOT for review.....	NLT February 12, 2018
• Submission of the final amendment package to USDOT	NLT February 19, 2018
• ODOT clarification and approval.....	Early March , 2018
• USDOT clarification and final amendment approval.....	Mid March 2018

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:** Amends the 2018-2021 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 17-4817 on July 27, 2017 (For The Purpose of Adopting the Metropolitan Transportation Improvement Program for the Portland Metropolitan Area).
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

TPAC recommends the approval of Resolution 18-4858. (TPAC approval 12/15/2017)

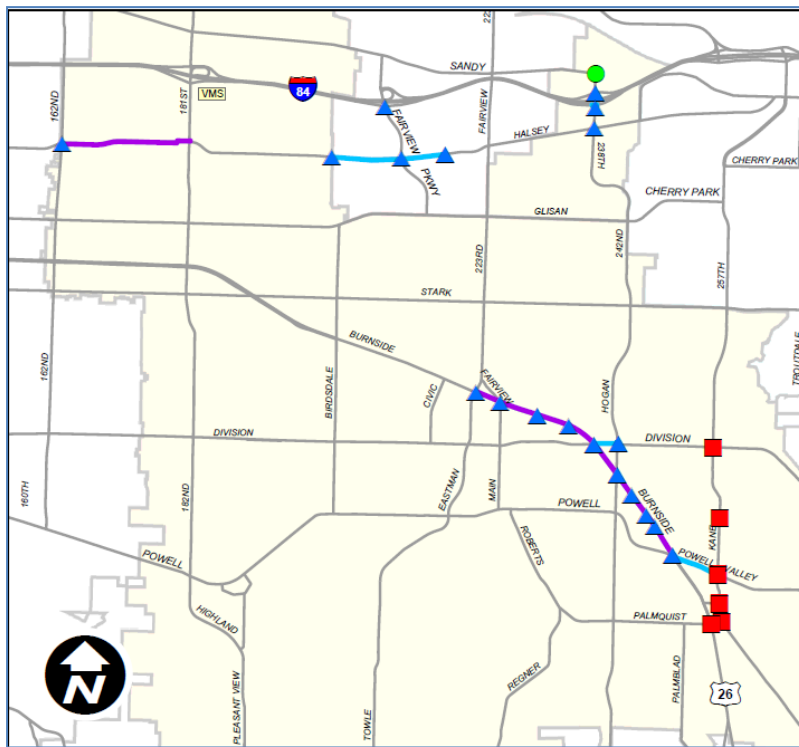
Attachment: Project Location Maps

Date: Thursday, December 29, 2017
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: Attachment 1 to December 2017 MTIP Formal Amendment Staff Report – Project Location Maps

BACKGROUND

Available project location maps are included in this attachment to the staff report for projects included.

Key 18306
 East Metro Connections ITS, City of Gresham



- LEGEND**
- HARDWARE UPGRADES**
- CONTROLLER AND COMMUNICATIONS UPGRADE
 - ▲ COMMUNICATIONS UPGRADE ONLY
 - SCATS EXPANSION
- Signal Communication Cable Install**
- 96 Strand Fiber Optic
 - 12 Strand Fiber Optic
- Variable Message Sign**
- VMS Arterial VMS

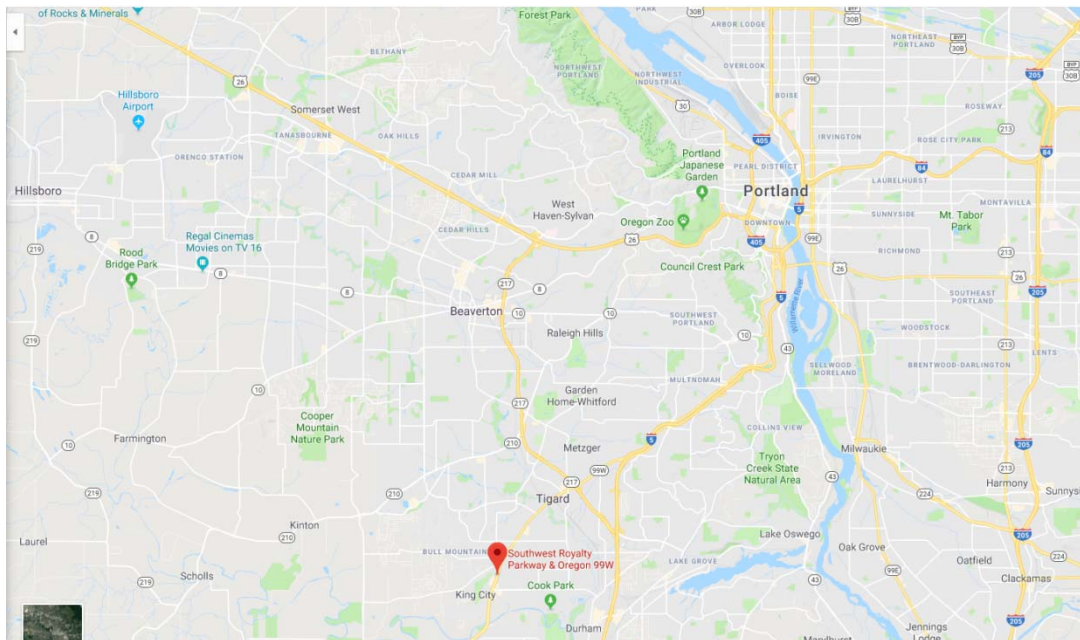
Key 18807
OR99W: SW Royalty Parkway - SE Durham Rd (King City)



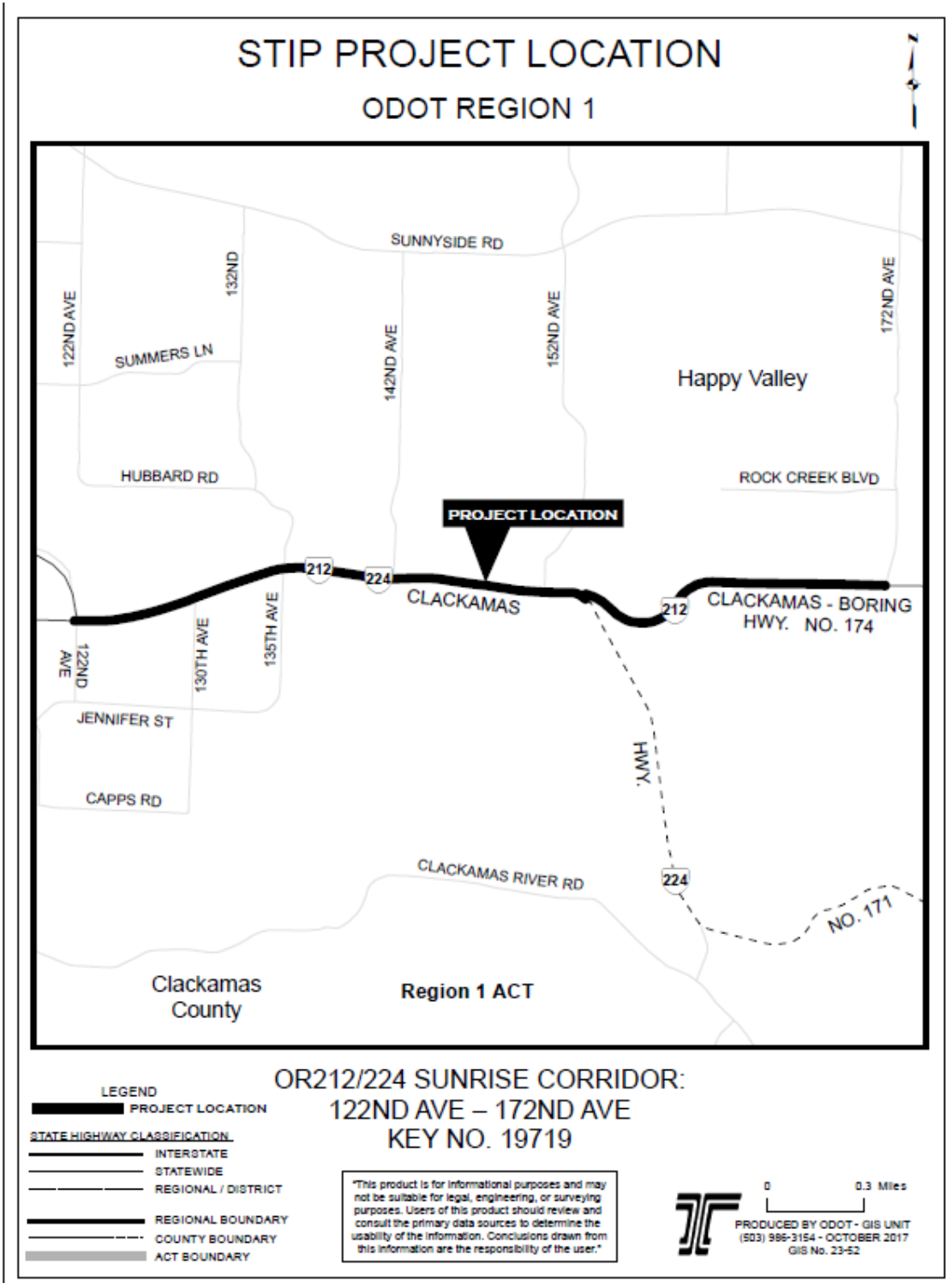
K18807: SW Royalty Pkwy - SW Durham Rd

SW Royalty Pkwy, MP 11.22

SW Durham Rd, MP 11.38

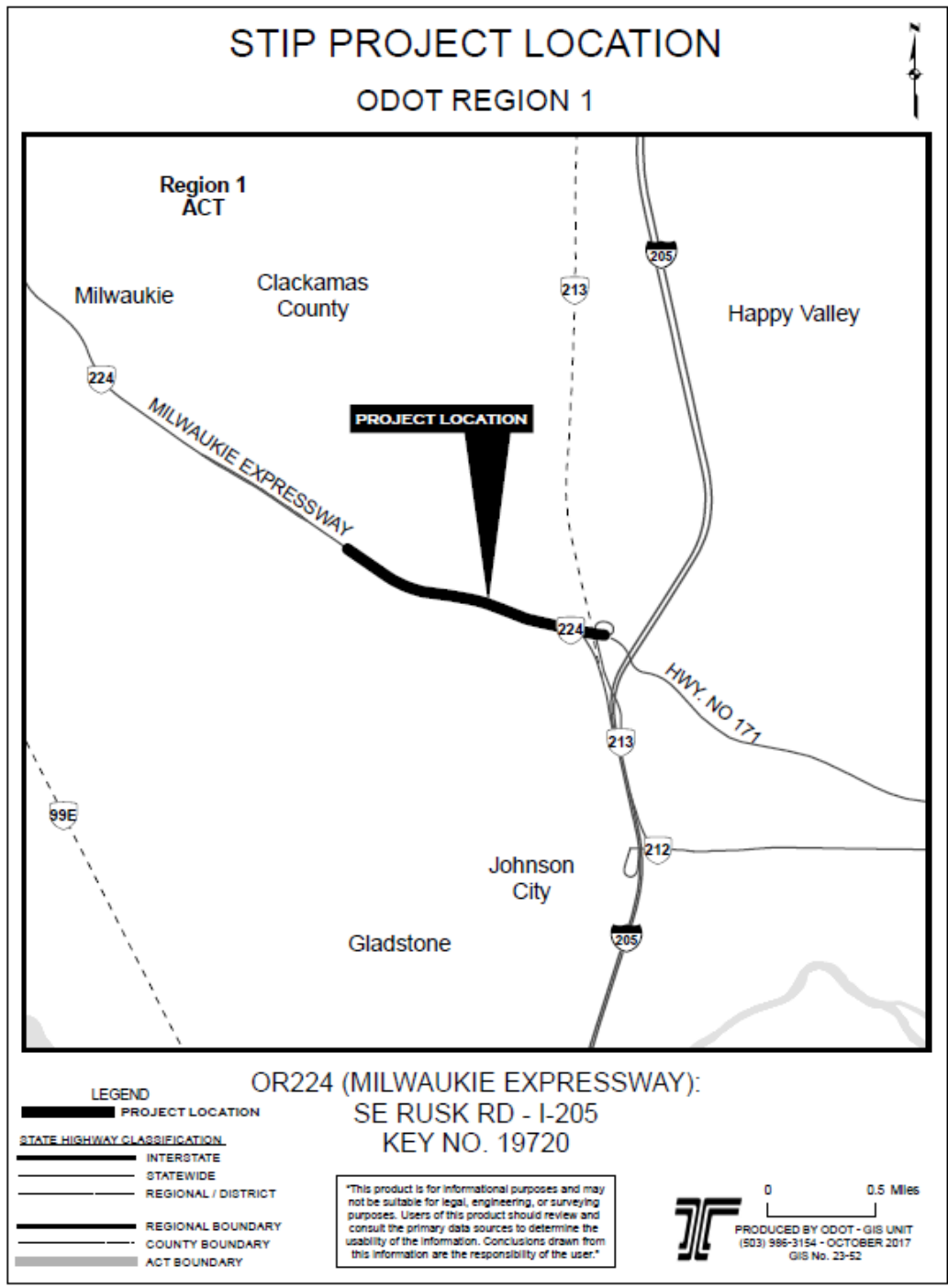


Key 19719
 OR212/224 Sunrise Corridor: 122nd – 172nd Ave, ODOT
 (Corrected map now inserted)



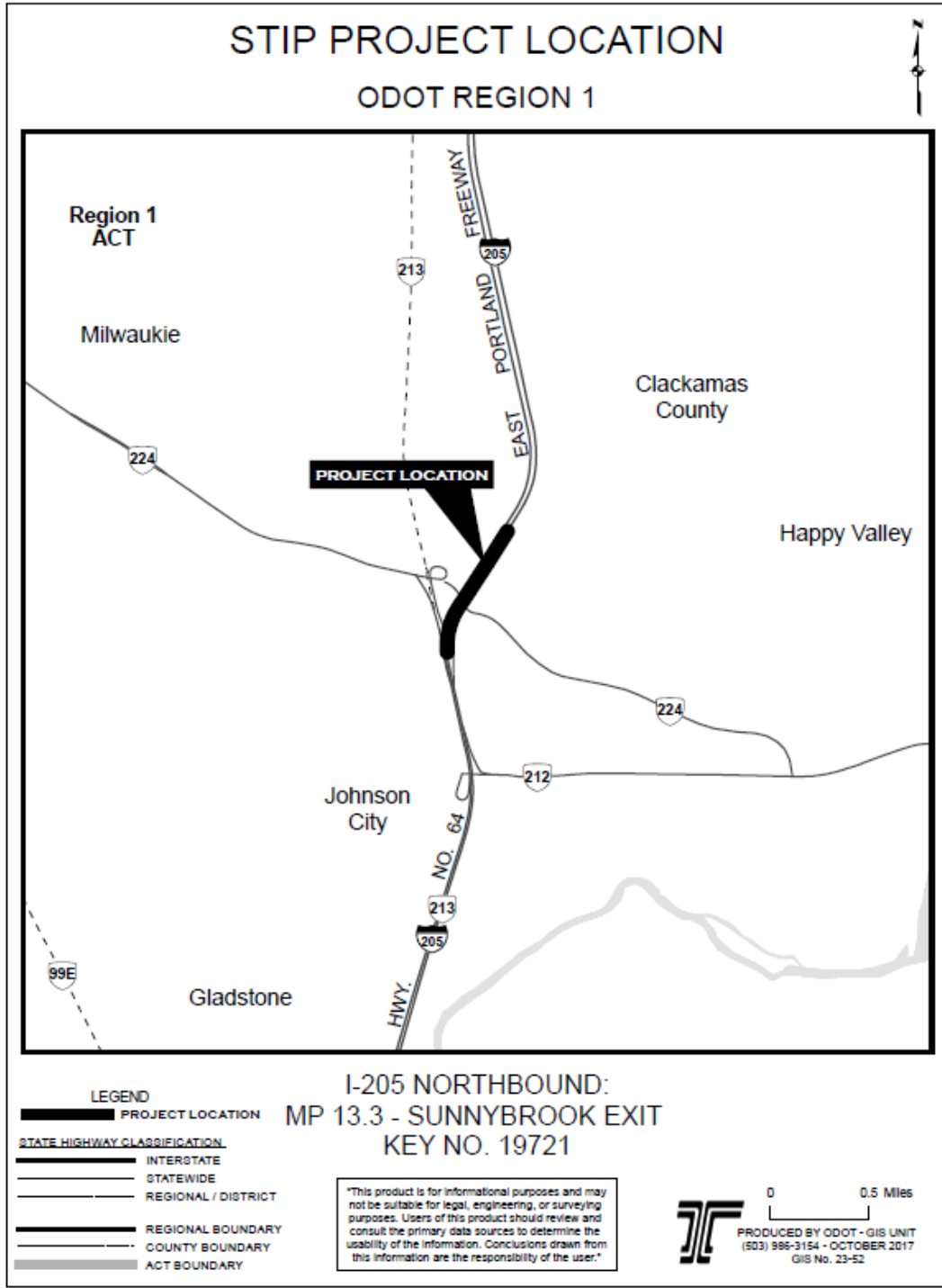
Key 19720

OR224 (Milwaukie Expressway): SE Rusk Rd - I-205, ODOT



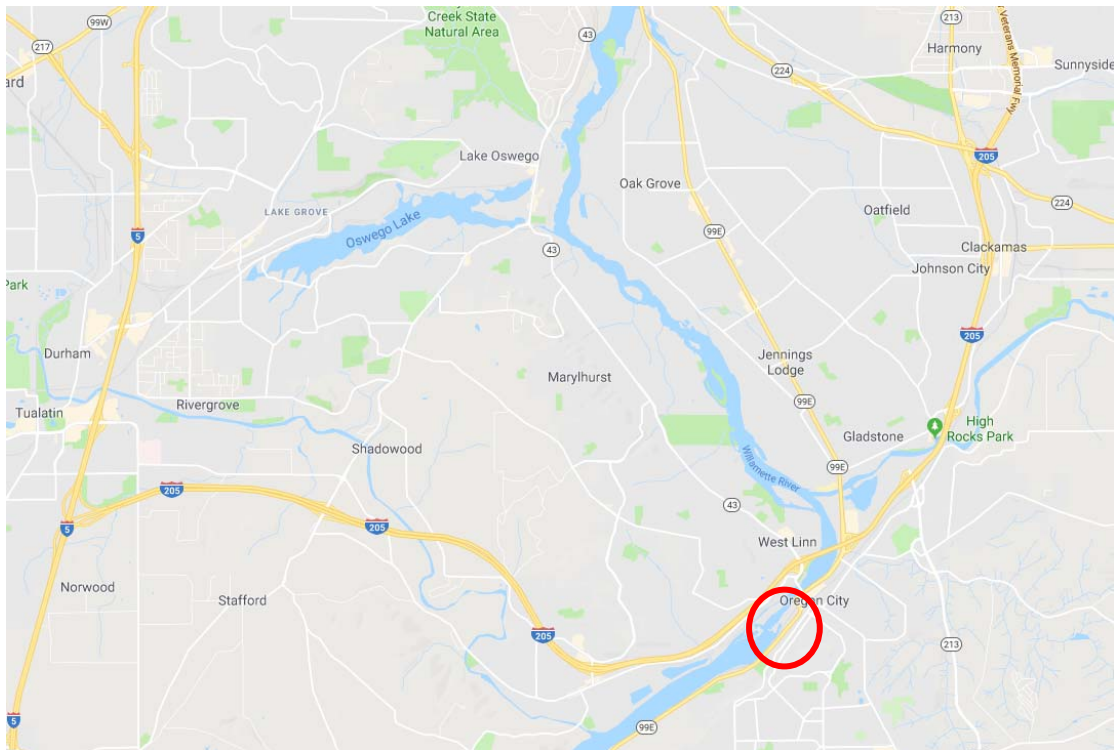
Key 19721

I-205: OR224 (Sunrise Expressway) - Sunnybrook Blvd



Key 18769

OR99E: Rockfall - Oregon City Tunnel to Old Canemah Park, ODOT





JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT)
Meeting Minutes
November 16, 2017
Metro Regional Center, Council Chamber

MEMBERS PRESENT

Shirley Craddick (*Vice Chair*)
Craig Dirksen (*Chair*)
Tim Knapp
Nina DeConcini
Neil McFarlane
Dan Saltzman
Bob Stacey
Kris Strickler
Jessica Vega Pederson
Curtis Robinhold

AFFILIATION

Metro Council
Metro Council
City of Wilsonville
Oregon Department of Environmental Quality (ODEQ)
TriMet
City of Portland
Metro Council
Washington State Department of Transportation
Multnomah County
Port of Portland

MEMBERS EXCUSED

Jack Burkman
Jeanne Stewart

AFFILIATION

City of Vancouver
Clark County

ALTERNATES PRESENT

Emerald Bogue
Kelly Brooks
Tim Clark
Jef Dalin
Mark Gamba
Eric Holmes
Lori Stegmann

AFFILIATION

Port of Portland
Oregon Department of Transportation (ODOT)
City of Wood Village
City of Cornelius
City of Milwaukie, Cities of Clackamas County
City of Vancouver
Multnomah County

OTHERS PRESENT: Jamie Huff, Tom Makgraf, Nicole Hendrix, Dwight Brashear, Chris Deffenbach, Rich Vial, Jeff Gudman

STAFF: Nellie Papsdorf, Miranda Mishan, Michelle Bellia, Elissa Gertler, Ted Leybold, Grace Cho, Randy Tucker, Ernest Hayes

1. CALL TO ORDER, DECLARATION OF A QUORUM & INTRODUCTIONS

JPACT Chair Craig Dirksen called the meeting to order and declared a quorum at 7:34 AM.

2. CITIZEN COMMUNICATION ON JPACT ITEMS

There were none.

3. UPDATES FROM THE CHAIR AND COMMITTEE MEMBERS

Chair Dirksen provided an update on the JPACT finance subcommittee that met earlier in the week. He reminded the committee that the finance subcommittee was convened to make a recommendation to the TriMet Board of Directors on whether to proceed with a regional funding package in 2018, and what the basic elements of that package should be.

Chair Dirksen explained that at Monday's meeting they heard that TriMet had decided not to pursue a measure in 2018, and asked Metro to work with the region on a path to a 2020 measure. He added that this week there was a meeting of the task force of business and community leaders that had been on a parallel track to the finance subcommittee. Chair Dirksen asked for Mr. Neil McFarlane's input regarding the meeting.

Mr. Neil McFarlane shared that TriMet did not believe a 2018 measure was feasible. He explained that they did not have time to put together the projects that they had initially planned to do. Mr. McFarlane explained that there was a lot of interest around the issues from other stakeholders, and they were glad to hand off the measure to Metro.

4. CONSENT AGENDA

MOTION: Mayor Denny Doyle moved and Commissioner Jessica Vega Pederson seconded to pass the consent agenda.

ACTION: With all in favor, the motion passed.

Please note: Mr. Eric Holmes was sitting in as an unofficial alternate for the City of Vancouver, and did not vote.

5. INFORMATION/DISCUSSION ITEMS

A. Value Pricing

Chair Dirksen called on Mandy Putney from the Oregon Department of Transportation (ODOT).

Key elements of the presentation included:

- Ms. Putney discussed the history behind value pricing in the region. She explained that as the region grew they were experiencing significant congestion, and that the peak times were encroaching on the middle of the day.
- Ms. Putney highlighted the types of value pricing that had been implemented in Washington. She explained that one type of value pricing was tolls on a bridge or section of highway that varied by the time of day. Ms. Putney noted that this type of value pricing was often used as a financing mechanism if a bridge was being replaced or highway was being widened. She shared the other type of value pricing which was managed or priced lanes in which single occupancy users could opt to pay to use that lane instead of joining a carpool.
- Ms. Putney provided a brief overview of federal value pricing statutes and state policies. She explained that there were several restrictions on value pricing interstate highways. Ms. Putney added that one exception was that you could toll if you were reconstructing, adding new lanes or creating a toll lane from an HOV lane.

- Ms. Putney acknowledged that the OTC had authority to establish toll ways, but the revenues were subject to the Oregon constitution which said it must be spent on roadway improvements.
- Ms. Putney discussed the policy advisory committee which would be advising the OTC and discussed the charge and makeup of the committee. She recounted the committee's timeline for value pricing and explained the evaluation process, which would use the Metro model as a basis for analysis. Ms. Putney shared that after the proposal was submitted and accepted they would need to mood forward with a national governmental policy analysis. She added that there would also be a public engagement campaign for people to ask questions in person as well as online.

Member discussion included:

Councilor Bob Stacey asked about full facility pricing, and ubiquitous value pricing. He highlighted these types as other options for value pricing in the region. Councilor Stacey explained that he thought it was useful to have all options on the table throughout the analysis, and that he wanted clarification that these had been considered. He suggested looking to HB 2017 for finding locations for the test, and emphasized the importance of starting with a larger vision and downsizing from there.

Ms. Putney noted that there were other forms of value pricing that were left off of the table. She shared that there would be a broad overview of the options at the committee meeting as well as a discussion about what is feasible. Ms. Putney added that their goal was to do enough evaluation and analysis so that feasibility was clear.

State Representative Richard Vial explained that he thought there might be some misinterpretation of HB 2017. He explained that there was a lot of question about whether the entire corridor was going to be tolled or just segments. Representative Vial remarked that it would just be segments, and it was likely that only segments would be tolled, and it was unlikely that there would be new lanes added. He raised concerns about propagating the story that the whole corridor would be tolled, and emphasized that that was not going to happen.

Mayor Tim Knapp shared concerns about the timeline for value pricing. He suggested getting a clear idea of the rules and regulations around value pricing and what a pilot project would look like. Mayor Knapp cautioned Ms. Putney and ODOT against working on ideas that were not possible.

Councilor Craig Dirksen expressed appreciation for the presentation and shared that he would be sitting in on the coordinating committee. He suggested exploring the legality of what was possible and establishing goals and objectives. Councilor Dirksen noted that there was nothing keeping the region from defining what was possible.

Ms. Putney shared that FHWA would be on the committee providing input. She added that there was flexibility that had not been tested yet, which added some uncertainty moving forward with the analysis.

Ms. Emerald Bogue asked if they were seeking advice from any other jurisdictions. Ms. Putney confirmed that they also had representatives from Washington to help them. She noted that different jurisdictions expressed different possibilities.

Mr. Eric Holmes asked if this would be a system that spans both states and what would the conversation look beyond state lines. He asked what the timeline and implementation would look like if it spanned both states. Ms. Putney shared that they would be using the statewide and Metro model so that if there was a toll on the northern end of I5 they would be able to capture diversion that happened north of that, so results would be available on the high level. She explained that in terms of the NEPA process they were not sure what that would look like.

Mayor Knapp asked if the Washington Department of Transportation had been invited to form their own committee. Mr. Kris Strickler explained that they were planning on paying attention to the conversation but not forming their own committee.

Representative Vial emphasized that the question about value pricing was a very sensitive political issue. He conveyed that it was critical to remember that if they planned to toll they were going to have to show citizens that they were getting something for the value pricing experience.

Commissioner Stegmann reminded the committee of equity impacts, and highlighted the importance of cost of transportation to lower income communities.

6. ACTION ITEMS

A. 2021-2024 State Transportation Improvement Program (STIP) – MPO Comment Letter on ODOT Administered Funds and Program Funding Letters

Chair Dirksen called on Mr. Ted Leybold and Ms. Grace Cho from Metro's planning and development department.

Key elements of the presentation included:

- Mr. Leybold provided a brief introduction of the letter and reminded the committee about the coordinate processes of the STIP and MTIP and discussed the difference in oversight of the two. He noted that they were focusing on ODOT funding programs oversight, and explained the current OTC funding process.
- Ms. Cho explained what the funding allocations were for 2022-2024 and explained the different funding categories. She highlighted the funding levels for each proposed funding category and noted the discretionary funds proposed to leverage Fix It projects.
- Ms. Cho discussed the two scenarios that the OTC was discussing, the first was a \$124 million highway program that would be statewide and the other was \$24 million. She explained that both of them were set to be allocated through a leverage program, and would be looking to do highway based improvements.
- Ms. Cho discussed the comments in the letter to the OTC and the desired outcome from the letter. She noted that they wanted to respond and reiterate positions from the comment letter that they didn't see reflected in their program proposal. Ms. Cho shared the input that they had received about the letter from TPAC and the Region 1 ACT.
- Mr. Leybold explained the four main comments to the OTC and what the intentions and desired outcomes were.

Member discussion included:

Mayor Knapp shared that he felt the memo attached to the letter was too complex and difficult to follow. He encouraged the presenters to edit the memo into bullet points or something easier to grasp

Mr. Leybold explained that the goal was to provide a lot of detail in the memo for the OTC, and asked if it should be simplified. Mayor Knapp said yes.

Commissioner Roy Rogers shared that he was planning to abstain from the vote, because of his role as chair of the Region 1 ACT. He explained that he felt it was confusing to send another letter after the ACT had already sent one.

Ms. Kelly Brooks added that she was also planning to abstain. She acknowledged that a lot of the issues were already addressed in the ACT letter. Ms. Brooks requested that ODOT staff present on funding options to help members better understand the topic.

Chair Dirksen expressed that the comment letter that came out of the ACT reflected the views of that committee, and so the letter from Metro was expressing a different opinion, making it easier to have a split opinion. He explained that he felt that the way the letter was structured allowed them to keep the discussion at a higher level, but that there was enough background information that provides them with data for staff to address concerns. Chair Dirksen recommended adopting the letter.

Ms. Bogue asked about the trade offs in investing discretionary revenues. Mr. Leybold explained that it was a matter of what kind of programs the \$100 million was being put towards. He recounted a significant similarity between the Act letter and the letter from Metro, that they were asking the OTC to invest some discretionary revenue in other programs. Mr. Leybold summarized that they were asking the OTC to do more than the minimum required.

MOTION: Councilor Stacey moved and Councilor Craddick seconded to approve the comment letter.

ACTION: With Ms. Brooks and Commissioner Rogers abstaining, the motion passed.

Please note: Mr. Eric Holmes was sitting in as an unofficial alternate for the City of Vancouver, and did not vote.

ADJOURN

Chair Dirksen adjourned the meeting at 8:47AM.

Respectfully Submitted,



Miranda Mishan
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF NOVEMBER 16, 2017

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
3.0	Handout	11/2017	Metro's November Hotsheet	111617j-01
5.1	Presentation	11/16/17	Portland Area Value Pricing Feasibility Analysis	111617j-02
6.1	Presentation	11/16/17	2021-2024 STIP-ODOT Funding Programs	111617j-03
6.1	Handout	11/16/17	OTC Comment Letter	111617j-04
6.1	Handout	11/16/17	Detailed Response of MPO's 2021-2024 STIP Comment Letter	111617j-05

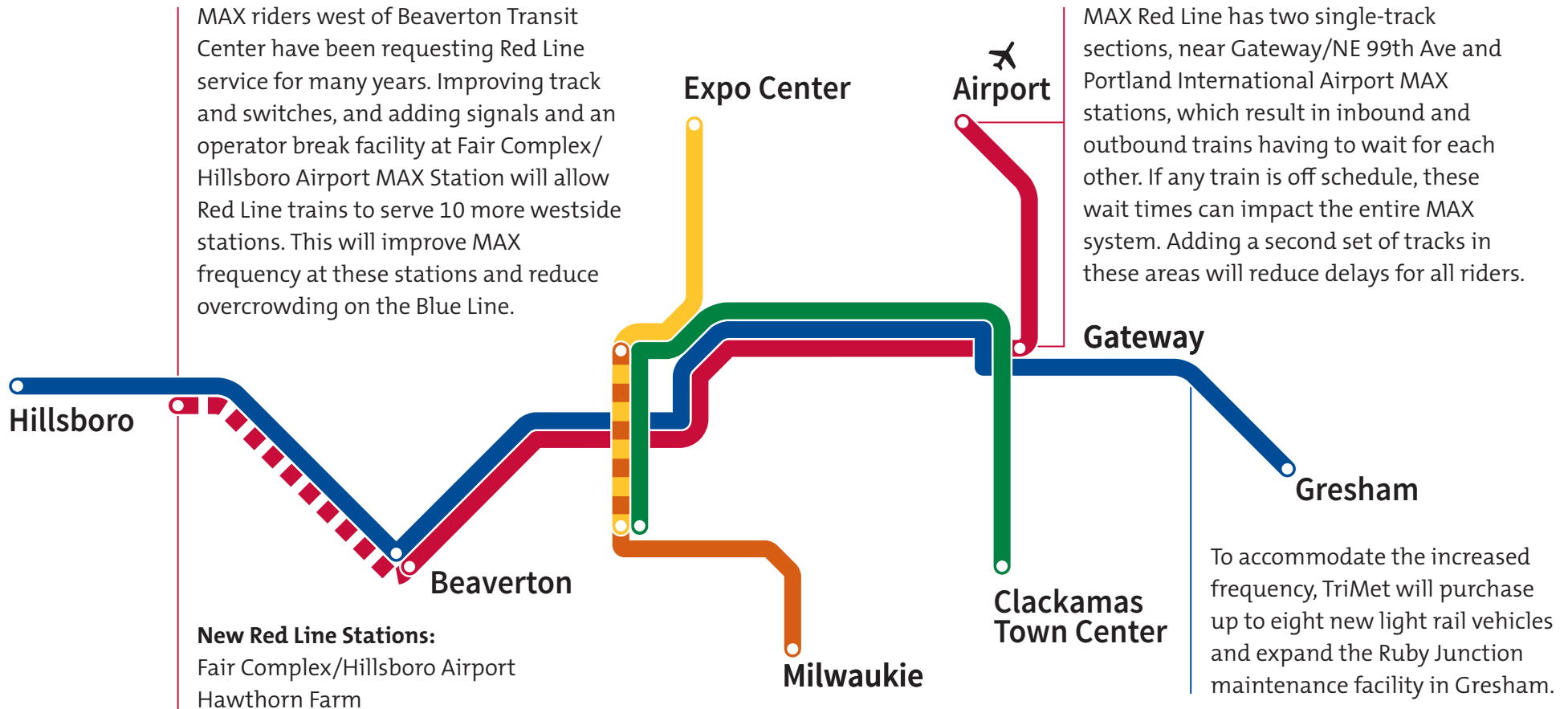
MAX Red Line Improvements Project



Improves on-time performance on all five MAX lines and extends MAX Red Line to 10 stations in Beaverton and Hillsboro

MAX riders west of Beaverton Transit Center have been requesting Red Line service for many years. Improving track and switches, and adding signals and an operator break facility at Fair Complex/Hillsboro Airport MAX Station will allow Red Line trains to serve 10 more westside stations. This will improve MAX frequency at these stations and reduce overcrowding on the Blue Line.

MAX Red Line has two single-track sections, near Gateway/NE 99th Ave and Portland International Airport MAX stations, which result in inbound and outbound trains having to wait for each other. If any train is off schedule, these wait times can impact the entire MAX system. Adding a second set of tracks in these areas will reduce delays for all riders.



- New Red Line Stations:**
- Fair Complex/Hillsboro Airport
 - Hawthorn Farm
 - Orenco
 - Quatama
 - Willow Creek/SW 185th Transit Center
 - Elmonica/SW 170th
 - Merlo/SW 158th
 - Beaverton Creek
 - Millikan Way
 - Beaverton Central

To accommodate the increased frequency, TriMet will purchase up to eight new light rail vehicles and expand the Ruby Junction maintenance facility in Gresham.

Estimated Timeline

Design	Construction	Opening
2017–2019	2020–2021	2022

Preliminary Estimated Budget

Approximately \$200 million, with 50 percent Federal funding to be requested.

Memo

Date: Monday, January 08, 2018
 To: JPACT and interested parties
 From: Dan Kaempff, Principal Transportation Planner
 Subject: DRAFT 2018 Regional Travel Options Strategy

Purpose

Introduce the first draft of the 2018 Regional Travel Options (RTO) Strategy to JPACT, and seek their input on the updated direction for the RTO program as defined in the Strategy.

Background

RTO is the region’s transportation demand management program and is a component of the Congestion Management Process. The RTO program supports the land use and transportation policy framework envisioned in the 2040 Growth Concept, and further defined through the Regional Transportation Plan (RTP). RTO works to increase people’s awareness of non-single occupant automobile options and to make it easier to use those options. The RTO program maximizes the return on the region’s investments in transit service, sidewalks and bicycle facilities by encouraging travel using these modes through education of their personal and economic benefits. It also helps to reduce demand on the region’s streets and roads, thus mitigating auto congestion and reducing greenhouse gas emissions.

Metro coordinates the work of cities, counties, transit agencies, non-profit community organizations and other partners that conduct a variety of efforts in support of the region’s RTO policy, goals and objectives. RTO policy guidance is provided through a Strategic Plan that further defines the region’s transportation demand management policy as laid out in the RTP.

Funding for the RTO program comes from two sources. The bulk of funding comes through a Step 1 Region-wide Investment allocation of Regional Flexible Funds (RFF). Additional funding for marketing and community outreach activities is provided through a grant from the Oregon Department of Transportation (ODOT). Funding levels for the Federal Fiscal Years (FFY) spanning from 2019-2021 are detailed below in Table 1.

Table 1 – Regional Travel Options funding (FFY 19-21)

Source	Federal amount
RTO – RFFA	\$7,789,811
RTO – SRTS	\$1,500,000
ODOT (estimated)	\$622,695
Total:	\$9,912,506

As part of the 2019-2021 RFF allocation process, JPACT and Metro Council made the policy decision to increase the amount of funding invested in the RTO program in order to respond to state and regional initiatives. To increase the region’s ability to respond to the state mandate to reduce greenhouse gas emissions, as defined through the Climate Smart Strategies (CSS), the RFFA allocation was increased by \$250,000.

And, in response to input from a regional coalition of cities and community organizations, JPACT and Metro Council's RFFA decision included an additional \$1,500,000 for the implementation of a regional Safe Routes to School (SRTS) program to fund educational efforts at the region's public schools.

The RTO program has been guided by a Strategic Plan, developed in collaboration with the program's stakeholders and adopted by JPACT and Metro Council, since 2003. The 2018 RTO Strategy is the fourth iteration of the program policy, goals and objectives. It updates and refines these goals and objectives to better align the RTO program with new policy direction from Climate Smart Strategies, the 2014 and forthcoming 2018 editions of the Regional Transportation Plan and Metro's Regional Equity Strategy.

A key element of the updated Strategy is new direction for expanding the program through enhancing the capacity of the region's cities, counties, universities and not-for-profit community organizations to deliver RTO programs. It also provides the foundation for supporting communities and school districts with their local SRTS programs.

Plan Development Process

In March 2017, Metro staff provided TPAC with a preview of the proposed process and policy issues to be discussed in the update of the RTO Strategy. Prior to the TPAC discussion, staff identified five policy issues that were seen as critical to the continued success and relevance of the RTO program, and responded to new policy direction via CSS, the 2018 RTP, and JPACT/Metro Council direction related to the 2019-21 RFFA process. The five issues discussed were:

1. Growing the program's reach in Suburban Communities
2. Envisioning the role Technology should play
3. Developing a regional Safe Routes to School program
4. Enhancing and refining the regional Collaborative Marketing effort
5. Reaching out to new Community Partners to build more diverse means of reaching the public

TPAC affirmed these five policy areas, as well as the overall planning process and direction laid out by staff for the Strategy update.

Subsequently, Metro issued a RFP for qualified third-party contractors to conduct public outreach and research, and to write and produce the 2018 RTO Strategy. Alta Planning + Design was chosen and awarded a contract in May 2017.

During the summer of 2017, Alta gathered input through several methods aimed at capturing a broad and diverse range of opinions and insights from stakeholders regarding the RTO program. These methods included:

- Research of peer programs from outside the Portland region to gather insights and experience that could be useful in how Metro manages and evaluates the RTO program, and to help shape future program policy direction.
- Interviews with stakeholders who had current or past experience as RTO funding recipients, or who could likely be future RTO partners. These interviews were intended to listen to experiences from partners for their insights on what in the current RTO was working, and what were areas to improve upon, modify or expand.
- A series of public workshops focused on the five policy issues identified above to gather input from regional stakeholders. These workshops gave participants the opportunity to

provide their insights on how the program should respond and adapt to address these issues.

Changes from the 2012-17 RTO Strategic Plan

Based on input and feedback collected through the above means, the 2018 RTO Strategy recommends several changes or refinements to previous program direction as previously defined in the 2012-2017 RTO Strategic Plan.

1. Alignment with regional policy direction

The RTO program is a key strategy to implement the region's transportation and land use policy, and to respond to the state's mandate to reduce greenhouse gas emissions.

Goal 4, Objective 4.4 of the 2014 RTP directs the region to include investments in Demand Management as a means of more effectively and efficiently managing the transportation system. This goal specifically references telecommuting, walking, bicycling, transit, carpooling, and using techniques that encourage shifting automobile trips away from peak hours.

The Climate Smart Strategy, adopted by Metro Council in 2014, also includes investments in the RTO program among the actions Metro can take to reduce greenhouse gas emissions.

In June 2016 Metro adopted the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. The strategic plan focuses on removing barriers for underserved communities and improving equity outcomes for these communities by improving how Metro works internally and with partners around the Portland region.

2. Expanding the program and creating new partnerships

Two of the policy themes discussed in the initial phases of the Strategy development centered on how to reach new audiences. One method for this is to create new partners and local programs in those portions of the region where little or no RTO activity has occurred, or expand existing efforts where there is identified potential. Another is to build new partnerships with community organizations and other groups which share goals and objectives with the RTO program.

The 2018 RTO Strategy lays out a series of objectives focused on building new partners and encouraging innovation in partners' work, to allow for new methods of reaching the public to emerge that are responsive to local needs and circumstances, and that prioritize serving communities of color, persons with low-English proficiency, low-income households, older adults, youth, and people with disabilities.

Further, the Strategy provides further guidance to partners through a 0-5 scale called the Travel Options Capability Index (see page 43 of the draft RTO Strategy). The Index illustrates how partners can begin and grow RTO local programs through a series of indicators that delineate the various components of successful efforts.

3. Regional Safe Routes to School program direction

Policy direction from the 2019-21 RFFA process allocated \$1,500,000 for the development and implementation of a Regional Safe Routes to School program. The intent behind this funding was to support educational programs in the region's schools that teach and encourage children to walk, bicycle or skate to school.

Many similar regional SRTS programs exist around the country to serve as a model for Metro to follow. Key components of these program include training children on safe crossings of streets, events (such as Walk/Bike to School days) to raise awareness and interest among children and parents, organizing “walking school buses” (e.g. groups of children, led by parents, walking or cycling to school), and other educational and outreach efforts aimed at reducing auto trips to schools and improving student health.

While the RFFA policy direction did not provide specific, detailed direction on how Metro should develop a SRTS program, a general outline of what the program might entail was discussed during the RFFA process. Housing the SRTS program within the RTO program structure would enable Metro to leverage its existing grant-making capabilities to allocate funding to the region’s school districts and local governments. In addition, Metro is in a position to provide regional coordination and technical assistance to help begin, grow and strengthen local efforts.

Participants at policy workshop #3, which focused on SRTS, were largely stakeholders working directly with SRTS programs. They were asked to look at five different program scenarios and discuss which one(s) would best support their needs and vision for SRTS, or if there were other models for program delivery that should be considered. (The scenarios are attached to this staff report as Attachment 1.) Based on their insights, as well as experiences working with other regions on SRTS programs, Alta developed a framework for Metro’s implementation and administration of the region’s SRTS program.

The proposed SRTS implementation strategy is detailed within the draft 2018 RTO Strategy document, beginning on page 29. The implementation strategy defines Metro’s role in coordinating and supporting partners’ SRTS outreach programs. It recommends additional support staff at Metro as well as a third-party contractor to conduct coordination activities, develop implementation tools and templates, and provide technical assistance to local programs and practitioners.

4. Defined approach to using Technology

During the timespan of the 2011-17 RTO Strategic Plan, the number of Americans with smartphones more than doubled. Approximately 80 of US residents now use these devices, and combined with dwindling sales of desktop and laptop computers, it’s clear that smart, mobile technology has forever changed the way we communicate and access information.

This development has had direct impacts on the RTO program. Technological developments have created new ways for people to access travel information, make travel choices, and accessing and paying for transportation. RTO partners have considered various means of using these tools to help reach additional people and further their work.

The Strategy outlines how the RTO program should support Metro’s and our partner’s work with emerging technologies, and identifies the types of projects that best align with the program’s mission and goals. It also creates opportunities to learn from and deploy new technologies, with the goals of gaining information and improving the overall program.

5. Implementation and funding methodology

The Strategy defines an updated direction for the RTO program that builds on its historical success while recommending changes that can result in a growth in participation and a positive impact in helping the Portland region’s residents’ use of travel options.

Since its inception, the RTO program has been anchored by a number of key partners, committed to conducting programs aligned with the RTO mission. Over time, these partners have consistently engaged with the majority of residents served, delivered the bulk of the positive outcomes, and demonstrated innovation and excellence in their work.

The Strategy recommends changing the funding relationship with these key partners from one where funding is uncertain, due the nature of a competitive grantmaking process, which results in overall program outcomes are also uncertain, and replacing it with a system where funding is more certain, and grant agreements extend to three years, as opposed to the current two-year grant cycle.

Partners funded through such means would be subject to agreeing to higher standards of reporting and outcomes, with future funding being conditioned on their performance. In addition, they should have attained Level 3 or better status on the RTO Partners Capability Index (see pages 43-45 of the draft 2018 RTO Strategy). TPAC would take on an additional role to oversee the outcomes of these investments and make decisions on continuing partners' funding.

In addition to this funding allocation, a smaller amount of RTO funds would remain in a competitive pot, to create opportunities for new partners and innovative concepts to emerge.

Further staff and TPAC work is needed post adoption of this Strategy to refine and implement this proposed funding structure.

Comments and input to the draft Strategy

Staff presented the draft Strategy at a joint TPAC/MTAC workshop on January 3, 2018. The key points of discussion and staff responses from that presentation are summarized in Attachment 2, "TPAC/MTAC Workshop Comments."

Input from the January 3 workshop and from the JPACT discussion will be incorporated into a second draft Strategy to be released for comment in early February. This comment period is scheduled from February 5-23 and will provide stakeholders and interested parties the opportunity to help shape the final 2018 RTO Strategy.

Further discussion at TPAC and JPACT, and adoption by JPACT and Metro Council is scheduled to occur through the spring of 2018, as outlined below.

Schedule and deliverables

January	TPAC/JPACT briefings on first draft Strategy
February 5-23	Stakeholder comment opportunity on second draft Strategy
March 9	Requested TPAC recommendation of final Strategy to JPACT
April 19	Requested JPACT action to adopt final Strategy
May	Council action to adopt final Strategy requested

Implementing the 2018 RTO Strategy

The adoption of this proposed Strategy will bring about a number of changes to the RTO program, primarily related to how funding is allocated to partners, and how to best implement the region's SRTS program.

The draft Strategy document creates a framework for how funding can be allocated to better achieve outcomes that are aligned with regional goals and objectives. But, as a strategic direction document, it does not provide specific implementation details for how exactly to do that.

Metro will work with TPAC to develop, consider and implement program changes to accomplish these goals for both the regular RTO funding and the SRTS program. This work will commence in the Spring of 2018 and be wrapped up in time to inform the funding allocation process for projects beginning July 1, 2019.

Over time, as experience is gained and results are evaluated from this new funding strategy, further work may be necessary to modify and improve it. The Strategy allows for flexibility over the 10-year life span of this plan for adjustments within the parameters of the goals and objectives.



Metro Regional Travel Options Strategy Update

DRAFT SRTS Scenarios

November 28, 2017

With newly dedicated funding to support Safe Routes to School (SRTS), Metro is considering scenarios for establishing and implementing a regional SRTS program that supports local efforts.

The following scenarios were developed as part of Metro's Regional Travel Options (RTO) Strategic Plan update. Each of the five scenarios considers potential funding and investment strategies Metro may consider moving forward. The scenarios describe Metro's role, in terms of a full-time employee's salary, plus staffing costs. Each scenario is ranked by effectiveness for VMT reduction, equity support, regional SRTS programming, and how well it aligns with the RTO program-wide goals. Each scenario also includes a detailed pros and cons list.

The scenarios were developed through best practices in regional SRTS programs, from stakeholder feedback at workshops and interviews, as well as by regional SRTS practitioners and key Metro RTO staff.

The Metro RTO Strategy Update project team recommends scenario 5, which includes both additional staff support at Metro as well as a third-party contractor that would conduct coordination activities, develop implementation tools and templates, and provide technical assistance to local programs and practitioners.

Description		Metro's Role	Reduce VMT via direct program delivery	Equity: Build Partners' capacity	Regional SRTS Program (coordination & support)	Evaluation toward RTO program-wide goals	Pros	Cons
Scenario 1	Third-party SRTS coordinator through a contractor	0.25 FTE Contract mgmt. & mgmt. of local project delivery	**	***	***	***	<p>Brings technical expertise and (potentially) existing relationships</p> <p>Can connect districts/cities/schools across boundaries</p> <p>Dedicated person/group may result in more follow-through and ownership of program</p> <p>Lower overhead and administrative cost</p> <p>Provides added capacity at an organization</p>	<p>Creates an added step of communicating with Metro, as they are outside of Metro</p> <p>Does not add capacity at Metro; outsources the work</p> <p>Potential for higher turnover and more time spent building relationships with partners</p> <p>Potentially less effective for forming local relationships between cities & districts</p>
Scenario 2	Primary SRTS Coordinator housed at each County*	0.5 FTE Contract mgmt & mgmt. of local project delivery	**	***	**	**	<p>Could spur inter-county coordination, build existing relationships</p> <p>County could leverage existing SRTS programs at cities</p> <p>Could scale up existing local programs in more context-sensitive ways</p> <p>Could leverage County HHS and other agencies</p>	<p>Potentially less internal support & expertise for coordination position</p> <p>Challenging to coordinate between counties</p> <p>Less region-wide coordination & sharing best practices/lessons learned</p>
Scenario 3	Metro SRTS staff person	1 FTE mgmt. of local project delivery; technical assistance, coordination	**	**	***	***	<p>More regional scalability of programming (i.e. campaigns, resources)</p> <p>Could leverage existing Metro materials, knowledge, working groups, communication support</p> <p>Metro employment opportunity may attract more experienced candidates</p> <p>Offers region-wide support, evening gaps in expertise between counties/cities</p>	<p>Potentially expensive</p> <p>Significant amount of work for a single individual; limited ability for coordination and technical support</p> <p>Creation of useful, supportive relationships with practitioners around the region may take some time for staff to develop</p> <p>Potentially less effective for forming local relationships between cities & districts</p>

* Note: All scenarios will involve some form of SRTS coordination at the County level, whether by supporting a County staff position, providing county-specific coordination and technical assistance based on the year-to-year needs at each County. Scenario 2 differs by housing the main SRTS coordinators at the Counties, rather than regionally.

		Reduce VMT via direct program delivery Equity: Build Partners' capacity Regional SRTS Program (coordination & support) Evaluation toward RTO program-wide goals						
	Description	Metro's Role					Pros	Cons
Scenario 4	Local Implementation	0.25 FTE mgmt. of local project delivery	*	**	*	*	Local providers could collaborate via task force meeting or subcommittee of CMG Uses existing staffing & structure at Metro; no new programs More money available for sponsorship events and programs and pass through money Cities/districts/schools develop unique and context-sensitive programs based on their internal direction and interest	Limited ability to manage and coordinate to ensure regional outcomes are met Would continue to be an ad hoc process as cities/districts/schools became interested in implementation Would limit development of region wide resources Most susceptible to high turnover of local implementers
Scenario 5	Third-party contractor with Metro staff person (hybrid of Scenarios 1+3)	0.5 FTE contract mgmt; mgmt. of local project delivery	***	***	***	***	Good balance of regional knowledge & Metro support with technical assistance & local, practioner-level knowledge Flexible with program needs (i.e. early program development, later years primarily program delivery) Could hire new staff person ½ time on SRTS and ½ time on CMG and technical assistance for local providers	Potentially less effective for forming local relationships between cities & districts



Metro Regional Travel Options Strategy

TPAC/MTAC Workshop Comments

January 4, 2018

Table 1 below summarizes the key comments and discussion from the joint Transportation Policy Alternatives Committee (TPAC) and the Metro Policy Advisory Committee (MTAC) work session on January 3, 2018. These changes will be addressed prior to the public review draft in February, along with additional comments from the Joint Policy Advisory Committee on Transportation (JPACT).

Table 1. TPAC/MTAC Work Session Comments and Metro RTO Strategy Team Responses

TPAC/MTAC Comment	Metro RTO Strategy Team Response
1. Need to more clearly consider the different needs of aging populations: access to services, lack of mobility, etc.	"Older adults" are considered throughout the plan as important to specifically address for equity reasons. See page 46 of the draft RTO Strategy. We can add data about the need for mobility options for older adults.
2. Consider taking a more localized/project-based approach, rather than aiming to change regional VMT.	We will clarify that the RTO program is one element of the larger approach to achieving regional VMT reduction goals, working along with infrastructure and service improvements, pricing, and other approaches. We will also better clarify regional data and trends vs. data from RTO participants.
3. Goals should more clearly state why they are important and what they will achieve; they are too much like objectives and actions.	We will add context to the goals from the context provided in the document. In particular, we will clarify that VMT reduction is a measurable proxy for livability; the overarching goal is to provide cleaner air and water, healthier populations, and to improve safety.
4. Clarify what the RTO program does NOT do: shuttles, infrastructure improvements, etc.	We will add language to the introduction that defines the limits of the RTO program. RTO is the regional "brand name" for transportation demand management, which is defined as actions aimed directly at changing people's travel behavior through means other than building infrastructure. TDM works in conjuncture with infrastructure improvements to increase the number of single occupant vehicle miles traveled and non-auto mode split.
5. Consider focusing on workplace access and shuttles.	See above re: clarifying what is included in RTO and what is not included. The Plan provides the types of activities funded by RTO, which includes commuter trips. Much of the program's emphasis has been and remains on addressing commute trip needs. A deliberate decision was made some years ago to not use RTO funding to directly fund shuttle service, as the costs of providing such service is quite high, and the regional need was far greater than the available funds.

TPAC/MTAC Comment	Metro RTO Strategy Team Response
6. Discuss what the RTO program could do with additional funding.	Potential ideas: Increase funding available for local programs, combined with increased technical support from Metro; implement regional-scale programs such as individualized marketing or vanpool.
7. Provide background to the Map of Opportunities and clarify why the identified areas are designated as having high access to travel options.	The information on the source and data analysis is described in the map captions, foot notes and text discussion in the RTO Commute Report ¹ from which these were drawn. If further clarification is needed beyond the Commute report information, we can write up a description. We will add a highly detailed figure caption to each image/table/chart. It's important to note that this information is only one of a number of sources of information that stakeholders can use to develop programs.
8. Be more clear about how Metro can help communities meaningfully engage with the process.	We will develop an Executive Summary that provides a brief overview of the RTO program and its history, the problem statement, the Strategy recommendations, and how partners can get involved in the program moving forward.
9. Clearly state how the RTO program currently impacts the community and provides benefits.	This information is included in Chapter 1. We will include this as important context in the Executive Summary, to be included in the draft released for comment in February.
10. If the overall goal of the program is to manage demand, state which of the goals is most effective.	The plan contains data supporting each of the goals. We will more explicitly state that the focus on areas of opportunity, higher-capability partners, and partners with a proven track record of success are the most likely approaches to reduce demand and SOV use.
11. Provide a clear problem statement upfront to explain why the shift in the program is necessary.	Agree; we will make this more explicit and include it in the forthcoming Executive Summary.
12. Provide more context and source information for the mode split chart.	See above comment.
13. Discuss how the RTO program can work with STIF funding and coordinate through TriMet.	We are happy to collaborate with TriMet and other STIF service providers to help improve people's access to transit. We will add language to the Strategy which indicates this as an opportunity and work with TriMet and other partners on coordination.

¹ <https://www.oregonmetro.gov/sites/default/files/2017/09/20/Metro%20Commute%20Report%20FINAL.pdf>



2018 Regional Travel Options Strategy

DRAFT for public comment

DRAFT December 2017





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Metro is the federally mandated metropolitan planning organization designated by the governor to develop an overall transportation plan and to allocate federal funds for the region.

The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council. The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds.

Project web site: oregonmetro.gov/regional-travel-options-strategic-plan

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SECTION 1: INTRODUCTION

The Portland metro region's population is expected to grow dramatically over the next ten years. Maintaining a functioning transportation system requires new approaches to reduce the number of trips made driving alone. If we succeed, we will not only preserve mobility, but also reduce congestion, improve air quality, increase residents' access to travel options, and enable all community members to get to jobs and services. Infrastructure investments alone cannot meet the demand for new travel – we lack the land and the funding to build our way out of congestion. Metro recognizes that managing demand is an important complement to investing in infrastructure.

Metro's Regional Travel Options (RTO) program's charge is to reduce demand for driving alone. The RTO program connects people with the information and support they need to choose affordable, sustainable travel options, such as walking, biking, taking transit, or carpooling. The RTO program is a critical strategy for getting the most benefit and use from transportation infrastructure investments. Through grants, event sponsorship, policy guidance, regional coordination, and technical assistance, the Metro RTO program has been serving the region for over 20 years.

Over that time, the RTO program has funded effective, community-oriented projects across Clackamas, Multnomah, and Washington counties. During the 2017-2019 grant cycle, 17 projects received \$2.5 million in competitive travel options grants. Nearly half the awarded project funds support work that makes it easier for children, families, and college students to walk and bike to school. Other funded projects inspire residents to reimagine the use of streets through community open streets events. Additional projects involve wayfinding, trail counts, employer programs, production of outreach videos, and more. These projects use creative, inexpensive methods to inspire more people to use travel options to get around the region, thereby reducing vehicle miles traveled.

After several decades of positive impacts in the region, the number of people switching to affordable, sustainable travel options has plateaued. The RTO Strategy must adopt new approaches to engage diverse audiences and help achieve ambitious Regional Transportation Plan (RTP) goals. Metro will continue to work with longstanding government, non-profit, and education colleagues and well as partnering with new groups to broaden RTO program's reach and impact. This 2018 RTO Strategy Update outlines this approach and includes a ten-year vision, goals, objectives, and actions.

The RTO program strives to create healthy, vibrant neighborhoods by:

- improving the quality of the air we breathe
- reducing car traffic
- creating more opportunities for people of all ages and abilities to walk, bike, take transit, and carpool
- making the most of transportation investments by promoting their use

The program works closely with partners such as public agencies and local community-based groups who implement the strategy at a local level.



Changes from the 2012 Strategy

The 2018 RTO Strategy Update provides direction for the program into the next ten years. It builds on the historic success of the program, addresses challenges, and responds to community needs. This Strategy Update offers policy direction for establishing a new regional Safe Routes to School (SRTS) program, adapting to new technologies, and prioritizing projects and programs that address transportation system inequities faced by people of color, older adults, youth, and people with disabilities. It addresses the need for the RTO program to work with new partners to reach more residents throughout the region.

Specifically, the 2018 Strategy updates the RTO program by:

- Restructuring the competitive grant into a results and capability-based funding allocation, enabling Metro to provide more reliable funding to proven partners.
- Creating a fund for innovative projects that address transportation system inequities faced by people of color, older adults, youth, and people with disabilities or that test new technologies to provide greater access to travel options in the region.
- Actively developing deeper and additional relationships with community organizations to engage new audiences and expand program reach.
- Outlining a structure for the new regional SRTS program that involves coordination and collaboration, program development and technical assistance, and direct program delivery.
- Bolstering the Collaborative Marketing Group to serve as the outreach, technical assistance, and information sharing arm of the RTO program for all organizations conducting travel options work throughout the region.
- Creating funding opportunities for partners to conduct their own marketing campaigns and pilot projects.

Reading Guide

Search for these icons throughout the report to follow along with key themes:

Safe Routes to School



Equity



Technology



Look for this symbol to learn about key changes from the previous RTO Strategy:



Planning and Policy Context

The Metro RTO Strategy is an element of the Regional Transportation Plan (RTP). The 2018 RTO Strategy defines a ten-year mission, goals, and objectives to coordinate, implement, and evaluate local partners' efforts that help achieve regional air quality, transportation, equity, and livability goals. To assist in achieving these goals, the RTO program provides strategic funding, technical assistance, marketing support, and traveler information and services to governments and organizations. These partners run projects and programs intended to shift trips away from single-occupancy vehicles.

Commute Travel Trends in the Metro Region

The Portland Metro region has witnessed modest decreases in single-occupancy vehicle use (see sidebar). However, as the region continues to grow, increased overall auto trips have created congestion that results in regional challenges that the RTO program works to address:¹

- **Transit and carpool rates have declined.** Since 2008, transit mode share has declined by 2.7 percent, which may be due to a reduction in TriMet service hours following the Great Recession, lower gas prices, or the economic displacement of lower-income residents out of transit-friendly neighborhoods.² Carpool rates dropped by 1.6 percent over the same period.
- **The drive-alone rate has leveled off.** Drive-alone rates for employees involved in the RTO program have remained steady in recent years, with approximately two-thirds of trips to work made by driving alone. With more people moving to the region, an unchanged drive-alone rate means that more cars are crowding roadways.
- **Drive-alone rates vary widely across the region.** Employees in Gresham and in Downtown, Southwest, and North Portland have decreased their drive-alone rate the most. Forest Grove, areas along Powell Boulevard, Clackamas, and western Beaverton have seen increased drive-alone rates.

The RTO Program Contributes to Regional Shifts in Travel Modes

Regional successes in shifting trips away from single-occupancy vehicles include:

Portland metropolitan area residents are driving less.

BETWEEN 2005 AND 2015...



Commuting by travel options has increased.

SINCE 2009...

The overall rate of regional residents biking, walking, taking transit, and telecommuting

increased by **1.3%**



Working from home and bicycling have grown the most.

People are choosing active transportation for their trip to work.

SINCE 2008...

The share employees biking and walking to work has



¹ Metro RTO Program "Commute Options Report" (2017). <https://www.oregonmetro.gov/travel-options-research>

² "In Portland, Economic Displacement May be a Driver of Transit Ridership Loss" Transit Center. November, 14, 2017. <http://transitcenter.org/2017/11/14/in-portland-economic-displacement-may-be-a-driver-of-transit-ridership-loss/>.

With over 730,000 Portland Metro residents commuting to work daily, the growing region must rely not only on new infrastructure projects, but also on successfully promoting travel options, to help increase the efficiency of commuting.



Safe Routes to School in the Portland Region

Safe Routes to School (SRTS) is a national effort to encourage students and families to walk and bicycle to school. SRTS programs improve health and safety through infrastructure and non-infrastructure improvements. Infrastructure elements include walking and biking facilities, crosswalks, and bike parking. Non-infrastructure (programmatic) elements include traffic enforcement campaigns, walking and biking safety education, and encouragement programs. The most successful SRTS programs incorporate the Six E's: evaluation, education, encouragement, engineering, enforcement, and equity.

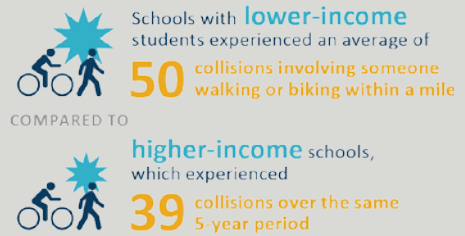
The Need for a Regional Approach to SRTS

In 1969, nearly 50 percent of all children in the U.S. (and nearly 90 percent of those living within a mile of school) walked or bicycled to school. Today, that number is less than 15 percent. This reduction in walking and bicycling can be attributed to traffic and personal safety concerns, poor infrastructure, lack of information about options, and the cultural prioritization of the personal vehicle. Safety concerns are particularly high for students of color, who experience disproportionate fatality rates compared to white students (see sidebar).

SRTS programs are a proven way of changing travel behaviors and effecting mode shift toward active transportation options. When designed well, SRTS programs increase physical activity, reduce congestion, boost academic performance, improve health, save families money, and provide environmental benefits in an equitable way. When implemented on a regional scale, they can help address these regional needs and outcomes through coordinated programs that provide support to cities, counties, and school districts.

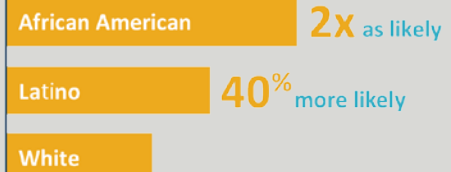
Communities in the Portland metro region use funds from multiple sources to launch SRTS education, promotion, and enforcement campaigns in elementary, middle, and high schools. At the local level, SRTS practitioners run education and encouragement programs with families and schools, while cities and counties work with schools to identify and fund infrastructure projects near schools. Municipalities support these efforts by hiring coordinators, developing pedestrian and bicycle facilities, and establishing policies to support safe walking and bicycling. Regional coordination is necessary to help cities and school districts coordinate across boundaries. SRTS

Regional Trends Highlight the Need for Safer Routes to Schools:



Nationally, rates for child fatalities vary by race:

Children Killed While Walking



Dangerous by Design, 2011
© 2015 Safe Routes to School National Partnership

requires participation from multiple agencies and departments from the county, city, school district, and community-based organizations so coordination improves communication and information sharing across the region.

School Travel and SRTS in the Portland Region

In the greater Portland region, cities and school districts have been independently involved in SRTS efforts for many years. Through the RTO program, Metro has funded SRTS projects around the region since the 2015-2017 grant cycle. With diminished federal funding for SRTS since 2012, local jurisdictions are increasingly seeking financial assistance for funding SRTS activities. However, Metro's previous level of funding was not enough to keep up with community demand for SRTS programs. In June 2016, in response to these dynamics and advocacy from the For Every Kid Coalition and SRTS National Partnership, Metro allocated \$1.5 million of regional flexible funds to be spent on SRTS programmatic initiatives through the RTO program. In October 2016, Metro released the *Regional Safe Routes to School Framework*, which provides data on current and historic funding and programming, identifies the schools with the greatest need for safety improvements, and proposes ways Metro can support local jurisdictions' efforts around SRTS and school transportation.

History of the RTO Program Structure

The RTO program, established in the 1990s, is primarily funded by Surface Transportation Block Grant Program (STBG), which is administered by the Federal Transit Administration (FTA). Additionally, the Oregon Department of Transportation funds marketing, community outreach, and SRTS via STBG funds administered by the Federal Highway Administration. The RTO program funding levels for 2019-2021 are approximately \$3 million annually.

Although the RTO program historically accounts for only one half of one percent of the region's transportation budget, its impacts are large and widespread. Since tracking of the program began in 1997, the use of walking, biking, transit and rideshare at businesses that work with the program's partners has risen from 19 percent to 39 percent, far above the national average. During the 2011-2013 grant cycle, more than 84,000 people from around the region reduced their driving by 47 million miles. That is the equivalent of 1.7 million trips from Beaverton to Gresham that did not happen thanks to help from RTO funding.

The RTO program has evolved over time. TriMet originally administered the program and focused on promoting transit use for commute trips. In 2006, as the program grew beyond its initial commuter outreach emphasis to include all trip purposes, TriMet and Metro agreed to transfer program oversight to Metro. Metro broadened the focus and incorporate residential outreach (individualized marketing or IM) to help people choose non-Single Occupancy Vehicle (SOV) travel options for different trip purposes. The first phase of Metro's program management included dedicated, performance-based grant funding for Transportation Management Agencies (TMAs), an IM grant, a small budget for competitive grants, and dedicated funding for the South Metro Area Regional Transit (SMART) commuter outreach, and TriMet's Employer Travel Options

Program. In 2012, Metro collapsed TMA and IM funding into a biannual competitive grant program. TriMet and PBOT continued to receive a set-aside to run their travel options programs. In 2019, the program will begin allocating dedicated funding for SRTS investments as well as implementing other recommendations in this Strategy. Figure 1 shows a timeline of the RTO structure and focus.



Figure 1. Timeline of RTO Structure and Focus

RTO Project Categories

The RTO program currently funds five main project categories:

- **Employer-based services** shift commute travel behaviors to non-SOV modes by marketing through employers. Employer-based outreach in the region has historically been focused on large employers (over 100 employees). However, Portland and other regional cities are increasingly working with mid-sized employers (20 to 100 employees) in order to reach more commuters. Figure 2 maps RTO-funded Commute Options Sites.
- **Community-based services** shift travel behaviors away from SOV use for non-commute travel through community-based events and activities. Community-based outreach programs address the more than 70 percent of non-commute trips taken in the Metro region. Most of these trips are under five miles, so walking, biking, or taking transit are good alternatives to driving. Figure 3 maps community-based outreach investments.
- **Safe Routes to School** programs seek to shift school travel to non-SOV modes for K-12 school schools through education, encouragement, enforcement, and engineering approaches. Figure 4 maps SRTS non-infrastructure investments funded through the RTO program and other sources.
- **Traveler information and services** create new sources of information to help people become aware of and use non-SOV modes. These include light infrastructure projects such as bike parking and wayfinding signage.
- **Planning** projects develop a local approach for implementing RTO programs. This type of project can be a component of a Transportation System Plan or other guiding policy document.

The **Collaborative Marketing Group** is the outreach and marketing assistance arm of the RTO program. It has evolved over the past decade from a subcommittee of Metro’s Transportation Policy Alternatives Committee (TPAC) into a regional forum that brings partners together to share

information, collaborate on regional marketing projects, and learn best practices for conducting outreach, communicating messages, and evaluating programs.

DRAFT

RTO Employee Commute Options (ECO) Investments

Data Included:
 Sites with Baseline Survey in Any Year
 + Follow-Up Survey Between 2013 - 2016

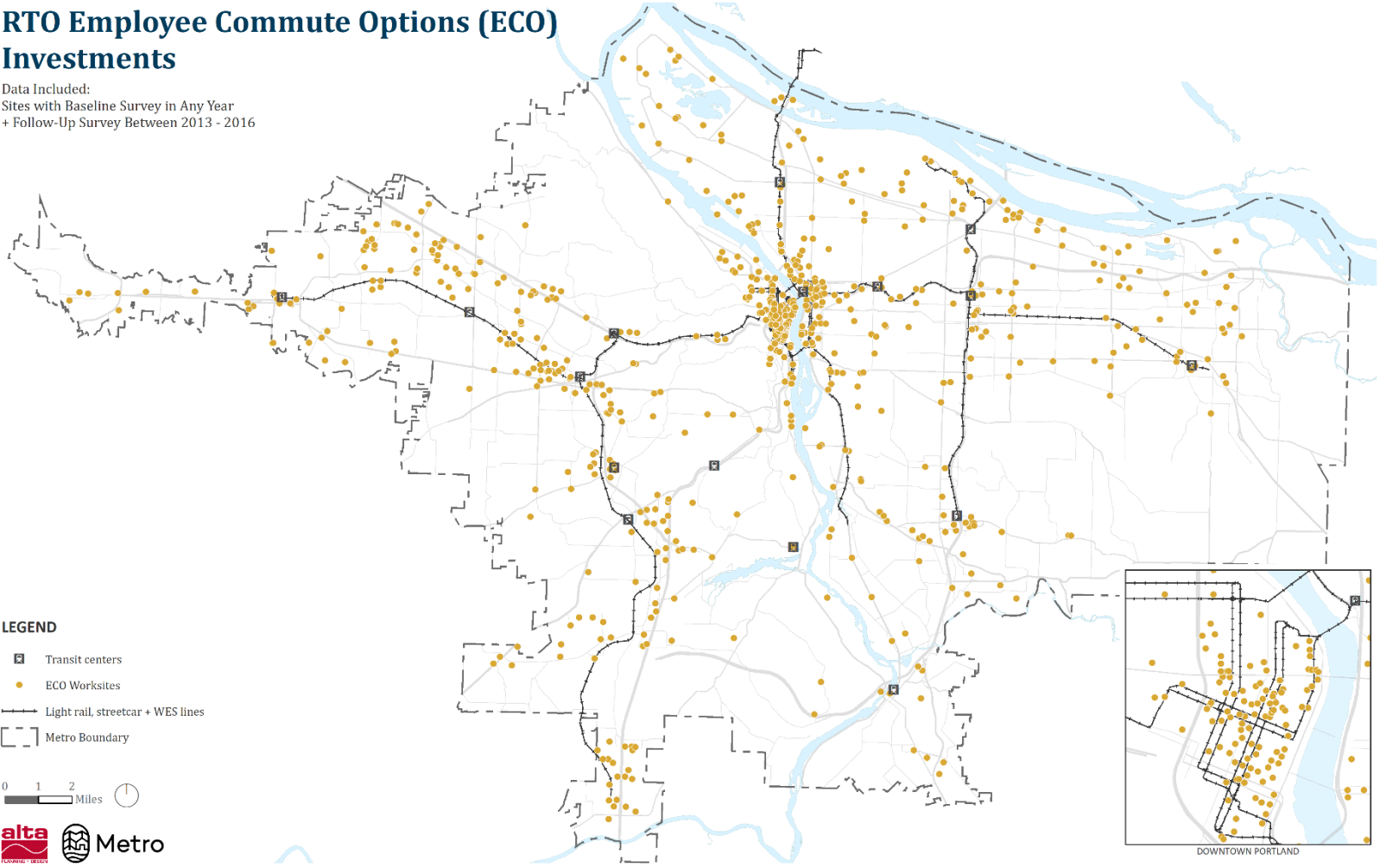


Figure 2. RTO-Funded Employer Commute Options Sites

Neighborhood Investments

Data Included:
 Projects in 2013-2016 Evaluation
 + 2015-2017 Grant Cycle
 + 2017-2019 Grant Cycle
 (SRTS & ECO Not Included)

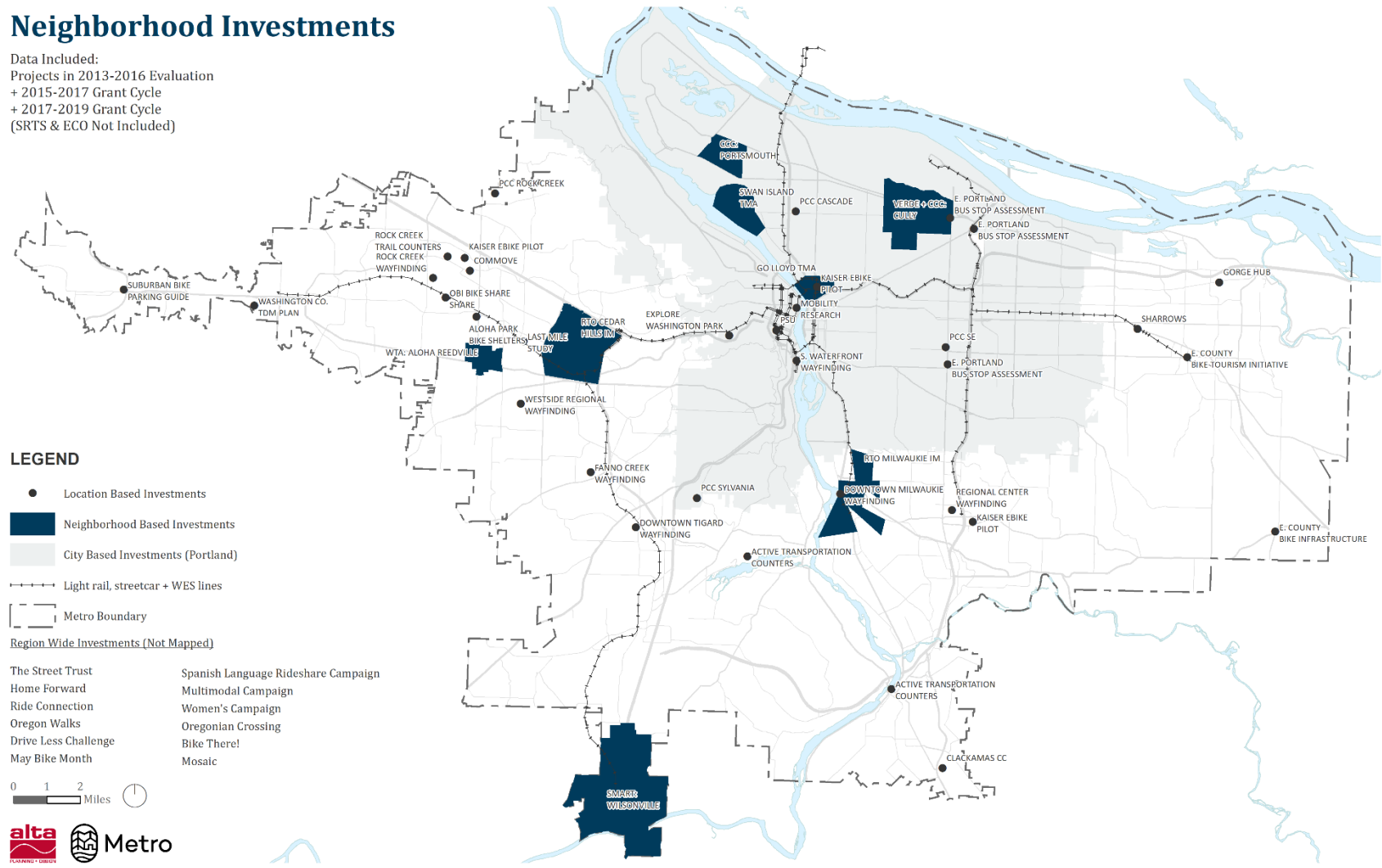


Figure 3. RTO-Funded Community-Focused Travel Options Investments

Current Safe Routes to School (SRTS) Investments

Data Included:
 2015-2019 RTO Grants
 Current ODOT SRTS Non-Infrastructure Grants

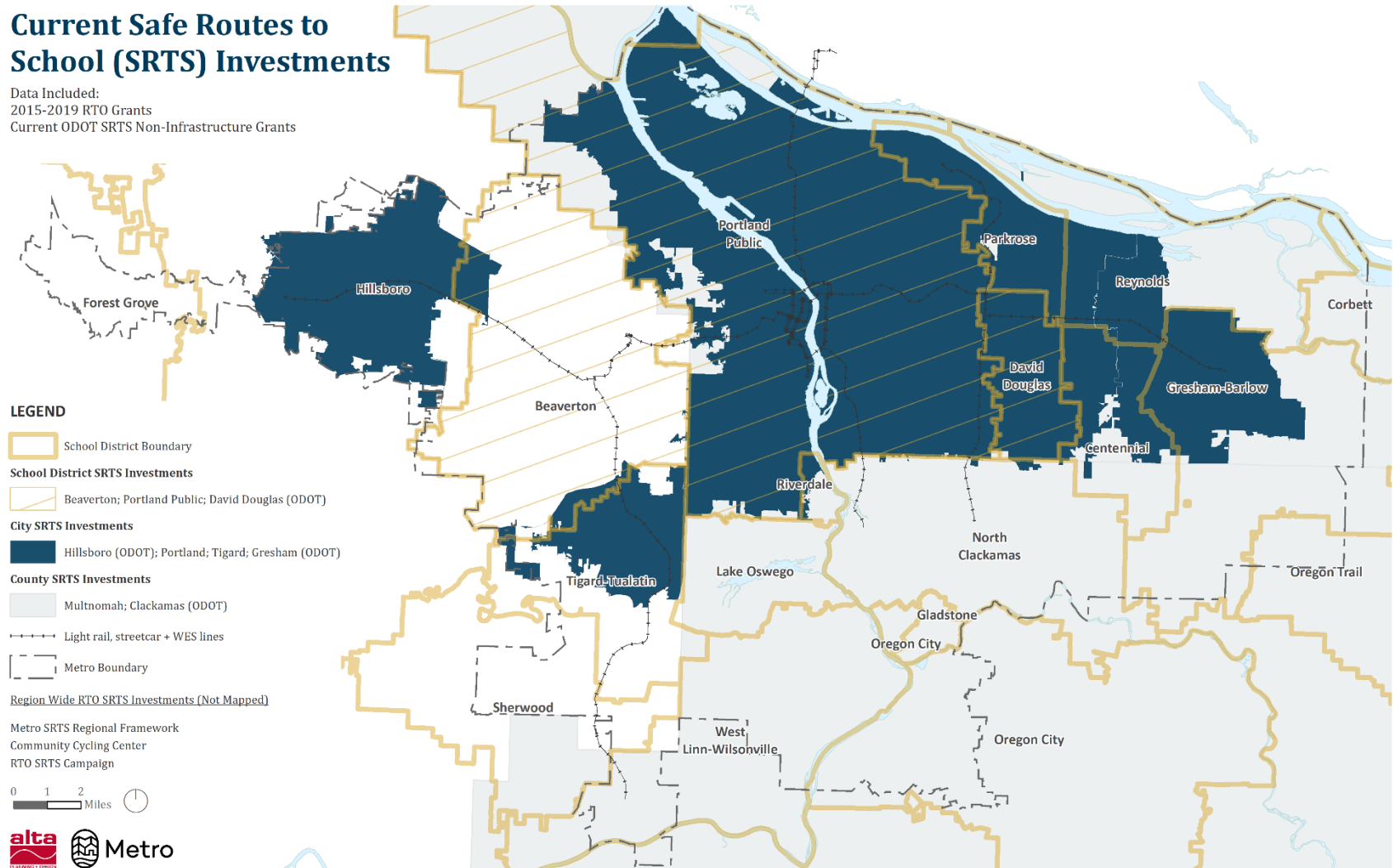


Figure 4. SRTS Non-Infrastructure Investments in the Portland Metro Area

Planning Process and Engagement

To create an RTO Strategy that furthers the goals and objectives of the RTP, while meeting the needs of different organizations and jurisdictions working in the region, Metro carried out a robust, dynamic public outreach process from August 2017 to February 2018. This process was designed to complement funding scenario planning, best practices research, and policy development. Figure 5 shows the full RTO Strategy Update process. The project outreach had three main components:

- Five workshops on key topic areas to understand partners' needs related to suburban communities, technology, SRTS, marketing and communications, and new partners
- 17 interviews with key stakeholders, including past and present partners, new partners who have not previously participated in the RTO program, and topic area experts
- Two opportunities for partners to comment on the draft RTO Strategy Update

Who Participated in the 2018 RTO Strategy Update Outreach Process

Project outreach focused on counties, cities, colleges/universities, school districts, and community-based organizations. These groups/partners were selected for engagement because they had managed or applied for a Metro RTO-funded project, because they work to encourage travel options through their work, and/or because they engage audiences that Metro would like to reach more effectively. The project team also engaged with private technology companies on a targeted basis as well as peer regional governments to learn from their topic area expertise. Selected organizations were invited to a phone interview, while all stakeholders were invited to attend workshops and review the Draft Strategy.



Figure 5. RTO Strategy Update Planning Process

The RTO Strategy Update process had strong participation from groups who had previously received RTO funding or were already familiar with RTO through their work. The project team did more targeted recruitment to identify and engage community-based organizations and other groups that may not have worked with the RTO program directly, but are doing relevant work or reaching communities of interest. In response to lower turnout for the Potential Partners workshop, the project team followed up with groups individually to conduct interviews and ensure a broader representation of voices and ideas.

Topic Area Workshops

Metro hosted five topic area workshops for current RTO partners and other interested groups, summarized in Table 1. The selected topics reflect Metro staff’s recommendations and were approved by the TPAC and the Joint Policy Advisory Committee on Transportation (JPACT). These specific topics were chosen as priorities for the 2018 RTO Strategy to address flat-lined program results, Metro’s Equity Strategy, planning direction from the RTP and Climate Smart Strategy, and alignment with Metro’s emerging technology strategy. Each workshop featured an overview of the RTO program and RTO Strategy Update process, facilitated small and large group discussions on the specific topic area, and a report-back session to foster learning among participants and project team members.

Table 1. Summary of Topic Area Workshops

Topic Area	Date	Number of Attendees	Topic Area Presenters
Suburban Communities	August 14, 2017	21	Derek Hofbauer, Alta Planning + Design Hannah Day-Kapell, Alta Planning + Design
Technology & Public-Private Partnerships	August 25, 2017	32	Elliot Rose, Metro
Safe Routes to School	September 29, 2017	27	Hannah Day-Kapell, Alta Planning + Design Kari Schlosshauer, SRTS National Partnership
Collaborative Marketing Group	October 23, 2017	25	Marne Duke, Metro Chris Watchie, Cogito
Potential New Partnerships	October 23, 2017	10	Hannah Day-Kapell, Alta Planning + Design

Stakeholder Interviews

Through 17 interviews with organizations and jurisdictions, potential partners, and topic area experts, stakeholders provided insights on their experiences with the RTO and ideas for the future direction of the program. Some interviewees had received RTO funding in the past or were current partners; others had never received funding or had never applied for funding. Two unique groups were included in interviews: the Sacramento Area Council of Governments (SACOG) and Via Transportation. SACOG provided insights into how the agency has engaged with the private sector to promote travel options, based on recent investments in a new TDM strategy. Via Transportation is a ridesharing company that has experience partnering with local governments

to implement creative rideshare and transit models. Representatives from these two groups were interviewed to suggest best practices and ideas for the Metro RTO Strategy Update.

Interview questions were tailored to the type of stakeholder. Each interview with a current or historic grantee covered personal experiences with the RTO program, what is working well, challenges groups are facing, and ideas for moving RTO forward. Interviews included questions about both technical/administrative aspects, such as how funding is managed, and more thematic aspects, such as what type of projects the RTO Strategy prioritizes.

Table 2. Stakeholders Interviewed

Past/Current Partners	Potential New Partners	Others
Beaverton School District	AARP	Sacramento Area Council of Governments (SACOG)
City of Gresham	Asian Pacific American Network of Oregon	Via Transportation, Inc.
Clackamas County	Immigrant & Refugee Community Organization (IRCO)	
Community Cycling Center	Mercy Corps Northwest	
Ride Connection	OPAL Environmental Justice Oregon	
TriMet	Portland State University's Institute on Aging	
Washington County	Rosewood Initiative	

Comment Opportunity

[TO BE COMPLETED AFTER COMMENT PERIOD]

SECTION 2. REGIONAL TRAVEL OPTIONS POLICY



2018 RTO Strategy Vision, Goals, and Objectives

The RTO Program's vision is to make the Portland metro region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation use, are environmentally sustainable, and benefit all greater Portland metro area residents.

The following goals support this vision by providing direction for the RTO Program. The objectives identify more specific steps with measurable outcomes, which guide future policy and investment decisions.

Goal 1. Reduce Vehicle Miles Traveled

Objective 1.1: Reduce the number of trips using personal, single-occupancy vehicles by educating and encouraging the public.

Goal 2: Expand the RTO Program to Effectively Reach Existing and New Audiences

Objective 2.1: Build and support partners' travel options capability and expertise.

Objective 2.2: Allocate RTO resources in a way that prioritizes communities of color, older adults, youth, and people with disabilities.

Objective 2.3: Encourage innovation and new technology to increase access to travel options.

Objective 2.4: Coordinate with state and local partners in planning for travel options work.

Goal 3: Implement a Regional Safe Routes to School Program

Objective 3.1: Provide regional coordination and program development to support Safe Routes to School efforts throughout the region.

Objective 3.2: Support local jurisdictions, school districts, and other partners in delivering Safe Routes to School programming.

Goal 4: Measure Program, Evaluate Impacts, and Continually Improve the Program

Objective 4.1: Evaluate RTO grants and funded programs to pursue a suite of RTO-funded activities that collectively achieve program-wide goals.

Goal 1. Reduce Vehicle Miles Traveled

Reducing vehicle miles traveled (VMT) and single occupancy vehicle (SOV) trips results in improved air and water quality, reduced congestion, and increased public health benefits.

Employee-focused programs can help reduce SOV trips. As of 2016, 6.6 percent of Metro area commuters walk or bike to work and another 13.3 percent take transit (Figure 6). Employees at surveyed employers have reduced over 58 million vehicle miles travelled each year, which saves 28,000 metric tons of greenhouse gas emissions. The RTO program builds on this regional momentum to shift commute trips away from SOV.

Non-commute trips are also important in reducing SOV trips, as more than 70 percent of the trips residents take in the Metro region are not for commuting. Most non-commute trips are less than five miles, meaning that many could be made by walking, transit, or bicycling.

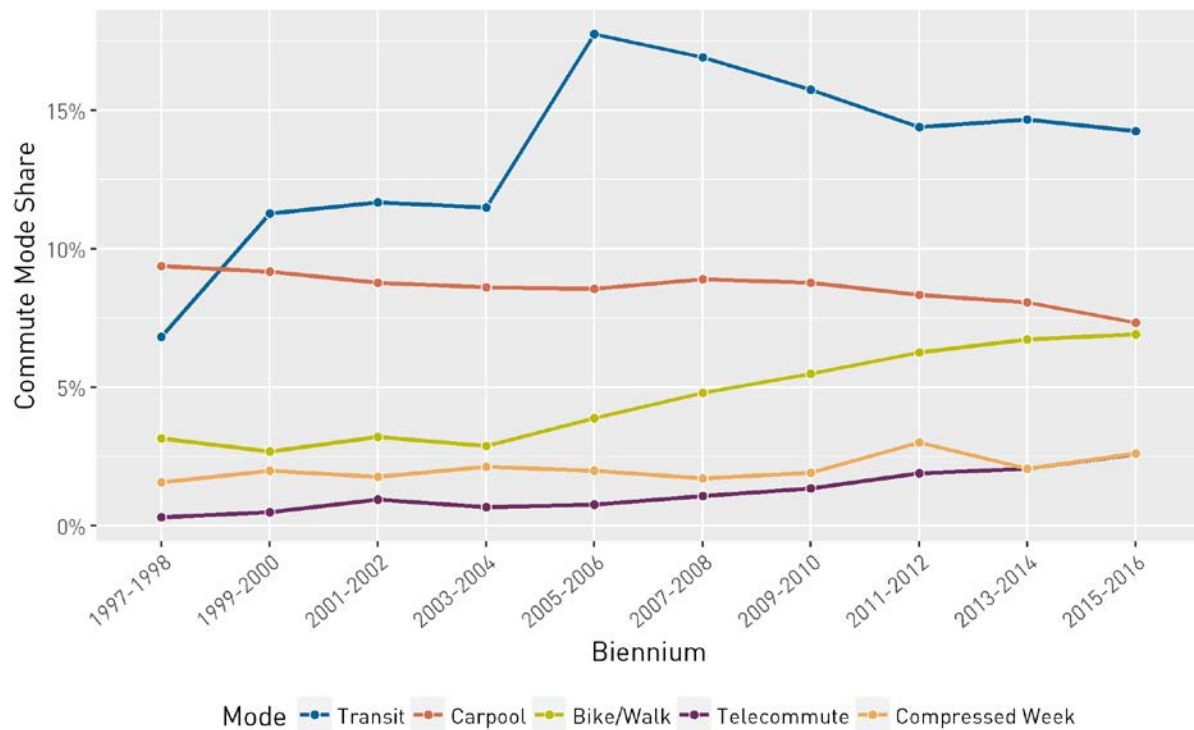


Figure 6: Non- SOV Commute Mode Shares Over Time (1998-2016)

Source: 2013-2016 RTO Program Evaluation

Goal 2: Expand the RTO Program to Effectively Reach Existing and New Audiences

RTO-funded programs help forge new relationships with community members and local organizations, reaching more people than they could have alone, and creating a ripple effect through their communities that continues to encourage the use of travel options long after the end of the funding cycle. Metro can partner with many organizations to implement the RTO Program, including transit agencies, cities, counties, colleges and universities, large employers, community-based organizations, advocacy groups, and others.



Prioritizing Equity in the 2018 RTO Strategy

People of color face distinct barriers to participating in travel options due to the pervasive and systemic nature of racism. In alignment with Metro's diversity, equity, and inclusion goals, and in response to extensive partner feedback, Metro recognizes the need for a focus on travel options services and information that serve communities of color, older adults, youth, and people with disabilities.

The RTO Program and its partners help communities of color, older adults, youth, and people with disabilities use travel options in their neighborhoods, and make using them easier and more comfortable. The region's affordable housing tends to be found in areas with fewer transportation options and higher transportation costs. On average, households in the Portland region spend \$11,683 on transportation costs per year, or about 20 percent of the median income. However, lower income households may spend up to 25 percent of their incomes on transportation.

Defining 'communities of color'

Metro's *Strategic Plan to Advance Racial Equity, Diversity, and Inclusion* (2016) defines communities of color as Native Americans, African Americans, Asian Americans and Pacific Islanders, Latinos or Hispanics, and immigrants and refugees who do not speak English well, including African immigrants, Slavic- and Russian-speaking communities, and people from the Middle East.

Previous Equity-Related RTO Grants



Verde's Living Cully project aimed to raise awareness of natural areas in the Cully neighborhood and improve bicycle and pedestrian access to them.



Ride Connection's RideWise project provides travel training and travel options counseling to older adults and people with disabilities to encourage using fixed-route public transportation.



The Community Cycling Center's Building Momentum provided mechanic training, bike safety education, a bike repair center, and an earn-a-bike program to low-income communities in Portland.

It is important to prioritize equity across all RTO activities objectives to ensure that all Metro residents, regardless of race, ethnicity, age, income, or ability, are able to use safe, affordable, sustainable travel options. Though projects that address the needs of these groups may not create the largest reduction in VMT, eliminating disparities between the travel options available to different groups is critically important to the success of Metro’s 2018 RTO Strategy.

Overall, the RTO Program decreases car-dependency and prioritizes lowest-cost transportation options. This is one strategy for fighting cycles of poverty, segregation, and displacement.³ RTO can help create a more equitable region by partnering with community partners to increase access to active modes for communities of color, older adults, youth, and people with disabilities.



Engaging with New Technologies

Technology has major implications for the RTO Program. On one hand, information about travel options is easier to access than ever before, and a growing number of ridesharing options give people access to a personal vehicle or flexibility to use other options. On the other hand, many emerging technologies and services are likely to increase driving at the expense of other options and are less accessible to communities of color, older adults, youth, and people with disabilities. It can also be challenging for Metro and partners to determine what technologies to invest in when the landscape is changing quickly.

The RTO program has funded numerous technology-related projects that provide better information to travelers and better data to partners. The 2018 RTO Strategy takes a more in-depth look at technology, outlining principles for Metro’s work with emerging technologies and highlighting the types of projects that can best support the program’s goals using newly-available technologies and services. These principles and projects are aligned with the Emerging Technologies Strategy that is also included in the RTP.

Partners’ Technology-Related Work

Examples of technology-related projects implemented by RTO partners:

- The Westside Transportation Alliance (WTA) developed [Commmove](#), a mobile app that provides route finding, carpool and other mode matching, benefits tracking, and a competition element.
- Metro and the Oregon Department of Transportation supports [Drive Less Connect](#), which enables commuters to log trips, connect with shared ride options, and track benefits. During the Oregon Drive Less Challenge annual campaign, participants can win rewards for any transportation option used other than drive-alone.
- Ride Connection and TriMet developed the [One Call/One Click](#) program that uses new technology tools to better connect people with demand-responsive transit options.
- Several communities are using new bicycle and pedestrian counting devices, including the City of Lake Oswego, Explore Washington Park, and soon Clackamas County and the City of Hillsboro.
- [Parking Kitty](#) is a new mobile app that provides payment processing and time tracking for paid parking spaces, first deployed by RTO’s partner Explore Washington Park.

³ Metro RTP Goal 9 (2014).

The RTO Strategy's focus on policy guidance for collaborating with new technology gives Metro's partners more clarity about how to best work with the opportunities and protect against the potential pitfalls.

It also provides Metro with learning opportunities about how to better deploy new technologies and services within the RTO program and throughout other work. The evaluation and performance measurement conducted through the RTO program is designed, in part, to give Metro the information needed to learn from how partners are applying new technologies.

Goal 3: Implement a Regional Safe Routes to School Program

The RTO program is integrating new dedicated funding for SRTS beginning in 2019, creating new opportunities for investment in active transportation programs, events, and marketing specifically aimed at schools and families. (See page 4 for more statistics about the need for and benefits of SRTS.) Regional coordination provides support for local practitioners with outreach materials, best practices for organizing events, and lessons learned from around the region.

Local SRTS practitioners provide on-the-ground assistance to individual schools and coordinate between school districts and local jurisdictions. See page 29 for more information about roles and responsibilities.

Goal 4: Measure Program, Evaluate Impacts, and Continually Improve the Program

Performance monitoring helps Metro track the results of transportation investments to understand how they perform. The RTO program provides evaluation guidance for funding recipients, and additionally collects substantial data and develops regular comprehensive reports.

Performance measures are a way to receive feedback about whether the RTO investments are resulting in progress towards the region's goals, performance targets, and expected resources, as established in the RTP. Regular evaluation indicates how the RTO program contributes to RTP performance measures and supports regional goals. Where possible, the RTO program evaluation should align with the Oregon Department of Transportation's Transportation Options Plan's identified program measures. These measures, tracked by the state-funded providers, will give a statewide snapshot of the performance of Oregon's transportation option programs.

Key 2014 RTP Goals that pertain to the RTO program include:

- Goal 3. Expand Transportation Choices
- Goal 4. Emphasize Effective and Efficient Management of the Transportation System
- Goal 6. Promote Environmental Stewardship
- Goal 7. Enhance Human Health
- Goal 8. Demonstrate Leadership on Reducing Greenhouse Gas Emissions
- Goal 9. Ensure Equity

2018 RTO Strategy Performance Measures and Targets

The following table outlines the 2018 RTO Strategy performance measures and targets, which provide an incremental approach for reaching regional goals. Each RTO program goal is divided into objectives. The objectives identify specific steps with measurable outcomes, which guide future policy and investment decisions. A rationale for each objective explains why this is an important part of the 2018 RTO Strategy. Each objective has targets and their corresponding performance measures. Performance measures track the progress toward meeting targets. As the program contributes to meeting each target, the region gets closer to realizing its long-term goals for equity, sustainability, economic vitality, and livability.

The RTO program conducts a program evaluation every two years to measure effectiveness of program investments and to track overall progress towards regional goals. The data for this analysis is collected through several survey instruments:

- The **Employee Commute Options (ECO) survey** is a state-mandated requirement for large employers (over 100 employees at a work site) to monitor the progress of commute options in encouraging employees to reduce their SOV trips to the work site.
- The **Oregon Department of Transportation (ODOT)'s annual participant survey** provides a snapshot of travel options participants by documenting mode split, travel options used, engagement, and satisfaction with travel options program services and interest in using travel options. The survey will also provide a "stage of change" analysis that gauges participants' stage of readiness. The survey can also be customized to each provider.
- The **State Travel Options (TO) Awareness Survey** is a statewide survey administered by ODOT via mail and online that studies the general population's attitudes towards travel options.
- Metro's **Regional Travel Options and Awareness Survey** tracks awareness of Metro's RTO programs, measures satisfaction with regional travel options, and examines traveler information tools, and commuter resources. The report also identifies key target audiences to help streamline RTO marketing efforts.
- **Metro RTO grantees survey** the populations reached through the grant activities and outreach, using measures from the Multiple Accounts Evaluation framework (see page 29).

The **Climate Smart Strategy** is a regional strategy that responds to a state mandate for a 29 percent reduction in per capita greenhouse gas (GHG) emissions from cars and small trucks by 2035.

Key recommendations related to the RTO program include:

- Implement adopted local and regional land use plans
- Make transit convenient, frequent, accessible, and affordable
- Make biking and walking safe and convenient
- Make streets and highways safe, reliable, and connected
- Use technology to actively manage the transportation system
- Provide information and incentives to expand the use of travel options

Table 3. Performance Measures and Targets

GOAL 1: Reduce Vehicle Miles Traveled

Performance Measure	Baseline	2028 Target	Data Collection Method
Non-Single Occupancy Vehicle (SOV) commute rate for communities participating in RTO-funded activities	33.7% (2015-2016 biennium)	40% by 2028	ECO data, Individualized Marketing Campaign results, local implementation results
Vehicle Miles Reduced (VMR) for communities participating in RTO-funded activities	47 million vehicle miles traveled (VMT) reduced per year (2015-2016 biennium)	To be calculated	ECO data, Individualized Marketing Campaign results, local implementation results

GOAL 2: Expand the RTO Program to Effectively Reach Existing and New Audiences

Performance Measure	Baseline	2028 Target	Data Collection Method
Awareness of travel options and participation in RTO-funded activities	Commuter programs engage with 250,000 employees; other data to be calculated	To be calculated	ODOT Travel Options Needs and Issues survey (future), ODOT Annual Participant Survey, State TO Awareness Survey, RTO Travel and Awareness Survey
Partners' placement on the Capability Matrix	Partner assessment to be developed using the Capability Matrix	To be calculated	RTO partners reporting
Percent of RTO investments targeted to communities of color, older adults, and/or people with disabilities	To be collected	To be calculated	RTO records
Identified barriers for communities of color, older adults, and/or people with disabilities reduced	To be collected	3-5 targets identified and reduced	ODOT Travel Options Needs and Issues survey (future), ODOT Annual Participant Survey, State TO Awareness Survey

GOAL 3: Implement a Regional Safe Routes to School Program

Performance Measure	Baseline	2028 Target	Data Collection Method
Non-SOV school commute mode share for schools participating in RTO-funded activities	To be collected	To be calculated	Parent surveys and student hand tallies collected by local partners
Number of jurisdictions or school districts with formalized SRTS programs	8 jurisdictions or school districts have a SRTS coordinator	All jurisdictions or school districts have or work with a SRTS coordinator	Local SRTS Coordinator reporting

Number of SRTS Coordinator positions in the region	8 SRTS coordinators in 2017	All districts have access to a coordinator (may not be housed at the district)	SRTS Coordinator reporting
Reach of SRTS programming (number of students involved in SRTS activities)	To be collected	To be calculated	SRTS Coordinator or grantee reporting

GOAL 4: Measure Progress, Evaluate Impacts, and Continually Improve the Program

Performance Measure	Baseline	2028 Target	Data Collection Method
Metro, or Metro and grantee, agree to measure one or more indicators per project in context of project goals and funding	26 grantees (70%) collect measurable data that addresses goals	All projects include measures that address goals	Measures and indicators defined in RTO Multiple Accounts Evaluation
Measure context and trends to inform strategic approaches for the RTO program	Survey a regionally-representative sample every two years	Survey a regionally-representative sample every two years to track increase in the percentage of grants used to mature the capability of partners based on previous evaluation	Survey of regional population with context data

SECTION 3. PROGRAM STRUCTURE

The RTO program reaches individuals throughout the Portland metro region through Metro and partner efforts, including counties, cities, Transportation Management Associations (TMAs), colleges, and universities, school districts, community-based organizations, TriMet, and others.

Fiscal Management

Historically, about half of the total RTO program funds were made available to local partners as competitive grants or small sponsorships to implement specific programs and projects. Almost a quarter of the budget had been set aside for employer-based outreach, via TriMet and SMART, and about a quarter had been budgeted for staffing the planning, evaluation, and grant program support, including managing the Collaborative Marketing Group, partner sponsorships, purchasing materials, and services (see Figure 7).

The RTO Strategy Update recommends altering Metro's existing method of allocating RTO funding to partners since adoption of the 2012-17 RTO Strategic Plan, as outlined in this section.



What we heard from partners:

- Metro staff support and technical assistance were vital for partners' ability to deliver successful projects
- The biennial grant timeline hindered partners' ability to develop and establish long-term, comprehensive programs
- The competitive grant structure made partners' fiscal planning and staff hiring difficult

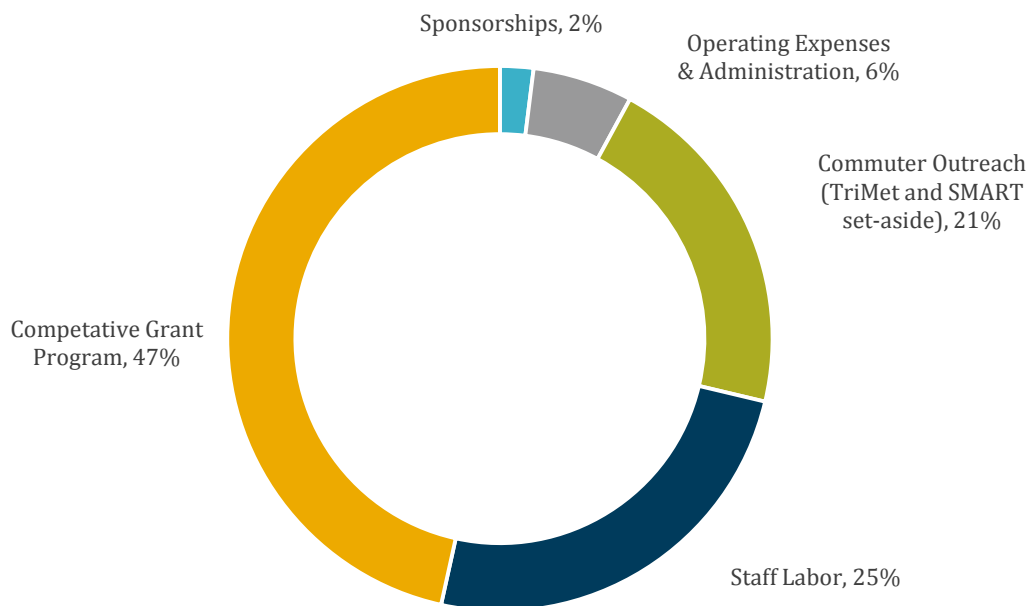


Figure 7. Breakdown of RTO Costs, 2017-2018 Fiscal Year

Metro's Program Management and Oversight

The RTO program has historically operated with minimal staff support for the many activities delivered and supported throughout the region, with 3.75 full-time equivalent staff (divided among seven individuals).

Metro will continue to support partners and work towards RTO program goals by:

- Coordinating RTO activities, including grant management, project scope of work and Request for Proposal development, project management, troubleshooting, reporting, survey research, and evaluation
- Regularly conducting a Strategy update
- Providing education and support for partners through the Collaborative Marketing Group regular meetings, special workshops and opportunities, sponsorships, and regular communications
- Developing and implementing marketing programs with partners
- Conducting a biannual evaluation of the overall RTO program and the individual grantees' projects.



Based on stakeholder feedback and the recommendations in this Strategy, expanded Metro staff capacity could better support existing and new partners and help achieve targeted outcomes.

Project Implementation

The RTO program supports a variety of projects that seek to shift trips away from driving alone and that support travel options including walking, biking, transit use, and carpooling, as summarized in Table 4. Metro supports these types of projects through grant funding, as well as through sponsorships and technical assistance. This categorization is a slightly modified way of defining the types of projects eligible for funding, but it does not change the specific types of projects that are eligible or likely to be funded.



What we heard from partners:

Key takeaways from the stakeholder engagement related to administration and oversight include:

- The RTO program is well-known among partners who work on transportation issues
- The RTO supports diverse projects that serve many communities and needs throughout the region
- It can be hard for partners to know how to engage with the RTO program efficiently and effectively
- Communities outside the city centers do not always feel included, including smaller and more suburban communities
- Communities of color, older adults, youth, and people with disabilities are less aware of RTO resources

Table 4. 2018 RTO Project Categories

Category	Likely partners	Needs addressed
<p>Commuter-based services: Programs that shift commute travel behaviors to non-single occupancy vehicles (SOV) modes through direct marketing and educational outreach to employees or through employers</p>	<ul style="list-style-type: none"> • Transit operators • Transportation Management Associations (TMAs) • Colleges & universities • Cities with large employment bases • Business organizations • Private sector partners (working with eligible partners) 	<ul style="list-style-type: none"> • Congestion • Air quality • Parking shortages • Access to jobs • Lack of transit • Last-mile connectivity • Cost of driving
<p>Community-based services: Programs that shift travel behaviors away from SOV use for non-commute travel through community-based programs, events and activities</p>	<ul style="list-style-type: none"> • Cities • CBOs • Counties • TMAs 	<ul style="list-style-type: none"> • Safety • Health • Air quality • Land use • Active Transportation • Equity reach
<p>Safe Routes to School: Programs that shift school travel to non-SOV trips to K-12 school schools</p>	<ul style="list-style-type: none"> • School districts • Cities • Counties • CBOs 	<ul style="list-style-type: none"> • Safety • Health • Air quality • Land use • Active Transportation • Equity reach
<p>Traveler information & services: Programs/projects that create new sources of information to help people become aware of and use non-SOV modes (includes light infrastructure such as bike parking and wayfinding signage)</p>	<ul style="list-style-type: none"> • TriMet (technology, bike parking) • SMART • Cities • Counties • TMAs • Colleges/universities • Private sector partners 	<ul style="list-style-type: none"> • Wayfinding • End-of-trip/bike parking • Incentives • Innovations that improve access & reach
<p>Planning: Development of local approach to implementing RTO programs. Can be component of a Transportation System Plan, or provide further strategic guidance</p>	<ul style="list-style-type: none"> • Cities • Counties 	<ul style="list-style-type: none"> • Defines a specific approach to how to implement RTO programs. Unique to local needs/priorities



Based on feedback and public comment, and a shift in policy direction to reach communities of color, older adults, youth, and people with disabilities, starting in the 2019 RTO cycle, the Metro RTO program will move away from the competitive grant model that has been the means of funding distribution to program partners, in favor of a distribution methodology intended to achieve the updated goals and objectives of the 2018 RTO Strategy.

This change will enable Metro to curate RTO activities, enabling staff to work directly with partners and craft activities to achieve the RTO Strategy. It also can help leverage and build on relationships between current and new partners, to reach new audiences.

Local Implementation

For the past several Metro RTO funding cycles, most of the money awarded has gone to a core group of partner organizations, which engage with the RTO over multiple years. These partners generally consider RTO work as being central to their mission and are highly experienced and successful at delivering RTO programs. As such, their work provides the majority of the regional program's VMT reduction and other program metrics.

Metro's current system of funding its partners presents several challenges to program performance. The existing project selection criteria do not recognize past performance and outcomes in determining future funding awards. This results in uncertainty for partners with regards to funding availability and can result in good efforts not being sustained. The current two-year funding cycle often does not allow for sufficient time to develop, grow and measure project success and staff institutional memory before the time to apply for new funding has arrived. Also, there are certain historical precedents whereby transit partners (TriMet and SMART) receive annual funding allocations outside the competitive process.



The next phase of the RTO program will shift away from strictly awarding competitive grants, which have served a limited number of recurring partners and communities that already engage in travel options work.

In order to engage with new and different audiences, Metro will begin directly providing resources to communities, agencies, and partners based on need, previous successful history with the RTO program, potential outcomes, and alignment with Metro's equity goals.

Local implementation funding provides more flexibility to communities and partners to implement programs and projects that meet the RTO program objectives. This enables Metro to assist partners with scope of work development and refinement, focus on tactics with proven effectiveness, and further invest in successful strategies. Local implementation funding can serve more communities by requiring a local match or gap funding to fully support a paid position. Metro will allocate this funding according to factors laid out in Section 5 Implementation.

Metro is also proposing a shift to a three-year funding cycle, as opposed to the current two-year model. Partners will benefit from expanded funding commitments that allow them to make

longer-term commitments to staffing and budgets. This change also reduces the workload on Metro staff by lengthening the amount of time between funding allocation processes.

With the implementation of these recommendations, TPAC should take on a more significant oversight role with regards to funding allocated to core partners to ensure program performance goals are being met and continued funding allocations are warranted, and to evaluate whether or not this method of funding allocation is meeting the region's goals and objectives.

Further work to identify core partners and establish an updated funding allocation methodology will be necessary upon adoption of the 2018 RTO Strategy. Staff will work with TPAC to develop an updated methodology.



Innovation Support

While local implementation funding has a clear focus on activities with proven effectiveness, measuring, and reporting outcomes, it is also important to offer an avenue to test new ideas and technologies. Innovation support will focus on technology partnerships, equity outreach, and new techniques for marketing travel options for adults and youth. This support could take the form of discretionary spending, a complete process, or pilot projects.

Innovation support will enable Metro to support technology-based public-private partnerships. With fast-changing technology, urban growth, and increase in travel demands, Metro will seek new ways of investing in technology that supports the RTO goals. Innovation support promotes new technologies by testing new innovations, exploring partnerships, developing business models, and investigating new technical capabilities, while also evaluating projects.

Planning Support

As a key step in implementing RTO programs around the region, planning activities will continue to be supported with RTO funding. Identifying a local strategy that reflects community needs regarding travel options provides a foundation for developing local programs to meet those needs. Local RTO plans can take several forms as warranted, ranging from enhanced guidance within a jurisdiction's Transportation System Plan (TSP), to creating a separate, more detailed topic plan.



Sponsorships

RTO sponsorships provide ancillary support to events, initiatives, and programs, and provide Metro and partners with strategic marketing or outreach opportunities. Sponsorships provide small funding to partner organizations for specific activities or events. Eligible organizations include non-profits, local governments, and educational institutions within the Metro boundary.

Past sponsorship awards have funded:

- Events that promote or educate residents about travel options
- Printing support for maps and educational materials

- Transportation safety tools, such as lights, helmets, and bike locks
- Light infrastructure, such as bike shelters, bike fix it stations, or bike parking



Scholarships

The new RTO scholarship program will provide small funding awards to community organizations staff members to attend state and national professional development opportunities to build capacity and deepen partners' ability to conduct outreach. Scholarship awards will be based on need and available budget.

Travel Options Marketing Coordination

The Collaborative Marketing Group (CMG) is the marketing, outreach, professional development, and research group for the RTO program. The group started as a subcommittee of Metro's TPAC over a decade ago. Since then, the group has expanded its focus from reducing commute trips to reducing single-occupancy-vehicle travel across many different types of trips. The group now serves as a regional forum to provide partners with marketing tools for communicating travel options messages and evaluating programs. Regular meetings bring partners together to learn from each other, access resources, and grow the regional RTO network.

The group focuses on and provides support for the following marketing tactics:

- Marketing support, including individualized marketing campaigns
- Advertising
- Written and visual online content
- Shared travel resources
- Contests and challenges
- Printed marketing materials

Based on workshop feedback, current participants in the CMG value the opportunities and materials that the CMG provides. Organizations and jurisdictions currently managing an RTO grant are the most frequent participants. Interviews with partners indicated that community-based groups and jurisdictions need additional support and resources in order to participate in CMG activities and work on travel options projects.



What we heard from partners:

The key strengths of the Collaborative Marketing Group (CMG) are:

- Its ability to reach a wide audience with marketing campaigns and boost partner communications to reach a wider network
- Its role to curate research and best practices so that partners can easily adopt cutting-edge marketing strategies with a proven behavior change track record

The CMG could further support partners by:

- Providing data, maps, translation services, graphic design support, material templates, and additional trainings
- Facilitating partnerships and relationships throughout the region

As the CMG evolves, the group will further expand to include other regional community-based organizations and groups for travel options promotion. As shown in Figure 8, organizations and groups can participate on many levels to effectively build capacity build to change regional travel behaviors.

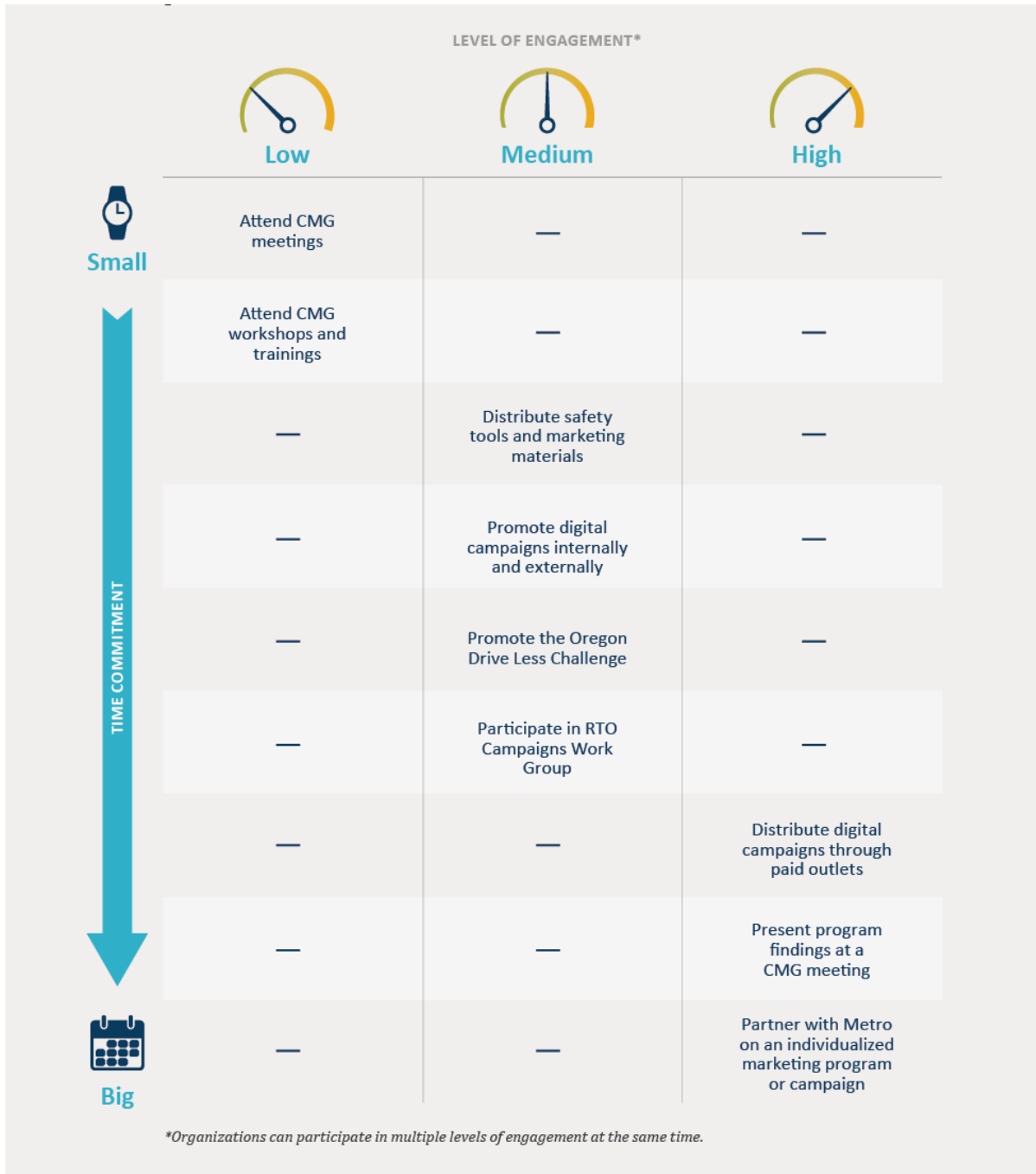


Figure 8. CMG Participation Levels

Evaluation and Measurement

RTO program staff uses the holistic Multiple Account Evaluation (MAE) Framework biennially to evaluate the RTO program as a whole. The MAE is a partner organization-informed evaluation tool that is customized to align with the RTO program's goals and objectives, as well as regional policy objectives. The MAE was an expansion of the evaluation process to include broader and longer-term changes enabled by RTO strategic planning, such as equity benefits, in addition to direct operational elements of the program, such as auto trips reduced.

The MAE process evaluates each project based on 18 indicators across five accounts:

- **Environment-** The project aids in enhancing and protecting the natural assets and environment of the region by reducing pollutants and consumption of energy and non-renewable resources.
- **Equity and Health-** The project promotes equity and health benefits by creating opportunities for greater accessibility and use of healthier travel options for communities of color.
- **Economy-** The project contributes to the region's economic vitality by promoting low cost travel options and the efficient use of land.
- **Efficiency-** The project enables the transportation system to be used more efficiently through increased use of travel options and is run in an effective and efficient manner.
- **Engagement-** The project raises awareness of, and participation in travel options resources and events among residents, employers, and other community members to use travel options and travel options resources and services more frequently.

The MAE is a way of collecting all applicable data from all organizations funded through RTO to indicate the project successes and evaluating the RTO program as a whole. Instead of relying exclusively on measured vehicle miles reduced, the MAE highlights a variety of types of project success. Organizations select which indicators and accounts apply to their project and report on those outcomes. Levels of available data vary between different projects, based on the partner's capability and level of funding provided.



Safe Routes to School Implementation

Regional coordination of SRTS programs will leverage local SRTS work around the region by providing opportunities for practitioners, school districts, public health officials, city staff, and transportation agencies to learn from each other and build on each other's experiences.



Regional

SRTS Coordination

RTO provides a space, structure, and support for an ongoing SRTS Task Force, which brings SRTS practitioners together on a regular basis to share their experiences, talk through challenges, celebrate successes, and discuss opportunities for expanding the reach of SRTS.

Elements of regional SRTS coordination include:

- Hire a SRTS staff person at Metro (0.5 FTE) with third-party contracted support to coordinate SRTS work in the region, support local efforts, and represent the region at the state level
- Host region-wide meetings to bring together practitioners and potentially students to learn from each other, and to identify opportunities for partnering through shared resources, regionally coordinated programs or events, or other opportunities to make the best use of SRTS funding
- Provide technical assistance for local efforts (see following section).

The combination of Metro staff and a third-party contractor provides the ideal balancing of regional knowledge and Metro-based support with technical expertise and local, practitioner-level knowledge. This provides the flexibility to develop program materials and implementation guidance in the early years, and focus on local program delivery (via counties, cities, and school districts) in later years. The outreach via region-wide meetings and other opportunities is crucial for a successful program, to facilitate local relationships between cities and school districts that have overlapping boundaries.

Program Development and Regional Technical Assistance

Regional technical assistance includes work with local jurisdictions and community-based organizations to help prepare funding applications to fund planning efforts, walk audits, infrastructure improvements, and non-infrastructure programs and coordinators. Technical assistance also includes training materials and hosted trainings to build local capacity for administering programs, support for data collection and evaluation, and marketing and communications support.

Build Local Capacity

A regional SRTS program can create template materials, including curriculum, outreach materials, and guidebooks, and can provide trainings to help local programs understand the toolkit of SRTS activities. A website of existing local and best practice SRTS resources could be shared among local jurisdictions and organizations seeking to develop a SRTS plan, conduct walk audits, seek guidance on liability concerns, or establish a SRTS program.

Prioritize Equity in Programs and Funding

Metro should establish and prioritize equity-focused criteria in Metro funding requirements and program outreach activities to ensure the program reaches youth from communities of color and who have disabilities. Metro can provide data and work with local jurisdictions and community-based organizations to help prepare funding applications to fund planning efforts, walk audits, coordinator positions, infrastructure improvements and non-infrastructure programs. Assistance should be focused on schools with an identified equity need to promote a fairer distribution of resources.

Translation and Interpretation

SRTS concepts should be translated accurately, consistently, and culturally (rather than word-for-word) throughout the region, which can be achieved by having a central resource providing these translations. Interpretation services should be provided to all programs and outreach events.

Evaluation, Data, and GIS

With the new dedicated funding for SRTS, the RTO program will expand the MAE Framework with metrics that specifically address school travel, outreach, and program development. Evaluation of SRTS projects typically rely on parent surveys and student hand tallies that collect data about families' travel modes as well as parent's concerns about walking and biking. Metro should provide guidance for consistent SRTS data collection and reporting throughout the region, enabling local programs to quickly and efficiently collect data, adapt their programs, and report back to the public. A regional SRTS program could also provide support to jurisdictions to collect data or coordinate travel surveys. SRTS program evaluation should take into consideration slower, more incremental mode shift changes, and where possible integrate qualitative data and success stories about building momentum, establishing relationships and partnerships, and developing a network of school, parent, and community partners who will support and host events.

A regional SRTS program should provide centralized data collection resources, such as materials and training for administering hand tallies and parent surveys, as well as a methodology for tracking events and participation in activities at schools. This would also include an online repository and interactive mapping of the GIS, demographic, and school participation data collected in the SRTS Framework, and would provide support for grant-writing and reporting needs. A regional SRTS program could also provide support to jurisdictions, schools, and organizations to create GIS-based maps for use in SRTS outreach and program initiatives.

Outreach, Leadership, and Storytelling

Metro should provide support for marketing, outreach, and communications to tell the story of SRTS successes in the region, ensuring audiences include media, elected officials, and the broader public. This could include producing an annual or bi-annual report on the status of SRTS in the region, which would provide background about SRTS resources and progress of the regional program, and promote the program to elected officials and the general public. A greater emphasis should be placed on the development of stories from those affected by the Metro funding program. A youth leadership/ambassador program could be established as an element of the program (e.g., JPACT student presentation).

Provide Access to Regional Materials

A regional SRTS program could provide access to infrequently needed materials, equipment, and opportunities. On-bike education requires equipment and space for a small portion of the year. To ensure all students can participate, acknowledging many youth do not own bicycles, Metro could make bike fleets and trailers available, or establish a mini-grant program for these types of

program resources. Other resources such as a traffic garden or incentives for implementation could be made available to regional partners.

Direct Program Delivery

Direct program delivery by local agencies and organizations builds partners' capacity to conduct travel options work can be structured in a way that allocates RTO resources to prioritize programs that benefit youth from communities of color and who have disabilities and encourages innovation and new technologies to increase access to travel options. Through a simplified competitive process, direct program delivery will provide resources to communities, agencies, and partners based on need, potential outcomes, and alignment with equity goals.

Contracted technical assistance with community-based organizations will allow for support of funding via one-stop access to resources such as pedestrian/bicycle traffic safety educators and grant-writing assistance for projects that address equity needs.

There are three types of direct program delivery categories for SRTS funding:

- **Local Pass-Through Funding** (SRTS program funding): This funding supports community-based activities that connect youth to education and encouragement opportunities related to school travel. This funding supports those communities already committed to investing in SRTS programs and/or infrastructure projects at schools, based on equity need, past performance, and demonstrated capability.
- **Innovation Funding** (SRTS establishment and innovation): This funding supports small-scale, innovative, or early-stage concepts. Categories include technology, new partners, pilot ideas, and those project ideas with a high potential equity impact. This funding may be requested by partners or Metro staff and will offer a smaller funding amount with additional technical assistance and support. In this category, it is likely projects will not initially obtain similar VMT reductions, as other fully funded programs, but they provide the opportunity to test ideas, bring on new partners not already working on SRTS and to generate potential greater future ROI.
- **School Site Improvements** (SRTS enhancement funding): This funding supports current or past program grants, providing funding for items that assist youth traveling by transit, foot, or bicycle to and from school, such as bicycle parking, wayfinding signage, and street markings at or near schools.

Roles of Metro, Counties, Cities, Districts, and others in Safe Routes to School Programs

A coordinated, comprehensive SRTS strategy for the region contributes to the region's desired livability, equity, economic, safety, and sustainability outcomes, as well as public health goals. While ongoing SRTS efforts focus on transportation and behaviors at individual schools and school districts, a regional approach for SRTS can better coordinate efforts, establish best practices, and reduce administration and program development costs.

Metro can support SRTS by:

Regional SRTS Coordination

- Hire SRTS staff
- Host region-wide meetings
- Coordinate efforts between jurisdictions and school districts

Program Development and Regional Technical Assistance

- Build local capacity
- Prioritize equity in programs and funding
- Offer translation and interpretation
- Support evaluation, data, and GIS
- Provide assistance and resources for outreach, leadership, and storytelling
- Provide access to regional materials and equipment

Direct Program Delivery

- Local pass-through funding to counties, cities, school districts, health departments, or CBOs
- Innovation funding
- School site improvements

Counties and Cities can support SRTS by:

SRTS Coordination

- Adding a SRTS coordinator staff position
- Provide matching funds for SRTS coordinators working at a city, county, school district, or CBO
- Be an active participant or a convener of a SRTS Task Force
- Notify schools when a transportation project is within 1/5 mile of an elementary school or one mile of a middle school

Program Development and Technical Assistance

- Seek funding and prioritize infrastructure projects around schools with a high percentage of students from communities of color or who have a disability
- Facilitate surveys and data collection and interpretation
- Generate projects for city, state, and federal SRTS infrastructure projects
- Develop a pilot program to promote safety and increase compliance with traffic laws near schools
- Direct program delivery
- Provide pass-through funding to schools and CBOs

School Districts can support SRTS by:

SRTS Coordination

- House a SRTS coordinator on staff
- Be an active participant in or convene a SRTS Task Force

Program Development and Technical Assistance

- Provide information to cities or counties about infrastructure safety needs around schools
- Encourage teachers to walk and bike for field trips and provide teachers and staff with a how-to guide for holding this type of field trip
- Direct program delivery
- Implement school district-wide SRTS activities and support individual school's efforts

Other community-based organizations can support SRTS by:

SRTS Coordination

- Work with school districts and cities/counties and house a SRTS coordinator on staff
- Be an active participant or a convener of a SRTS Task Force

Program Development and Technical Assistance

- Support SRTS efforts by contributing data, translation/interpretation, communications, community outreach expertise, or other specialties
- Direct program delivery
- Implement SRTS activities and support individual school's efforts

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SECTION 4. STRATEGIES AND ACTIONS

Goals and Actions

The following goals, objectives, and actions guide Metro for the next ten years. RTO will follow future RTP policy during the ten-year timeframe of this RTO Strategy, which may result in changes to some of the goals and implementation efforts.

Table 5 lists goals, objectives, and actions that guide the Metro RTO program to make progress toward the established vision.

Table 5. RTO Program Actions

Action			
Item #	Actions	Lead	Partners
GOAL 1: REDUCE VEHICLE MILES TRAVELED			
Objective 1.1: Shift trips to non-single-occupancy vehicle modes.			
a.	Invest in employer-based outreach projects in proportion to potential for reducing VMT, partners' capacity and readiness, and equity considerations.	Partners	Transit operators Transportation Management Associations Colleges & universities Cities with large employment bases Private sector partners
b.	Invest in community-based outreach projects in proportion to partners' capacity, past performance in reducing VMT, readiness for project delivery, and community need.	Metro	Cities Counties Colleges & universities Large employers
c.	Provide funding for new travel options in the form of small infrastructure projects that promote and support multi-modal trips.	Metro	Cities Counties Colleges & universities Large employers
GOAL 2: BUILD PARTNERS' CAPACITY TO CONDUCT TRAVEL OPTIONS WORK			
Objective 2.1: Build partners' travel options capacity and expertise regionally.			
a.	Continue hosting the RTO Collaborative Marketing Group to share best practices and lessons learned between practitioners.	RTO Collaborative Marketing Group	All partners
b.	Develop marketing and outreach materials targeted to employers (making the business case) and employees for partners to use to promote non-single-occupancy vehicle modes.	Metro Collaborative Marketing Group Contractors	Transit operators Transportation Management Agencies Colleges & universities Cities with large employment bases

Action Item #	Actions	Lead	Partners
c.	Develop marketing and outreach campaigns, including individualized marketing, in partnership with communities, targeted at community-based travel option education, new residents, or other identified transition (such as retirement or other life-stages).	RTO Collaborative Marketing Group Contractors	Cities Counties Colleges & universities Large employers Community-Based Organizations
d.	Support partners attending and participating in the RTO Collaborative Marketing Group, including encouraging participation from new partners, providing onboarding support, offering scholarships for training opportunities and supporting partner marketing efforts.	RTO Collaborative Marketing Group Contractors	Cities, counties, and community-based organizations with little previous travel options experience or capacity
e.	Provide technical assistance and resources to assist partners in advancing along the capability index.	Metro Contractors	All partners
Objective 2.2: Allocate RTO resources in a way that prioritizes communities of color, older adults, youth, and people with disabilities.			
a.	Strategically invest in partners, programs, and continuing education to reach communities of color and other new audiences including people with lower incomes, older adults, youths and people with disabilities, and other historically-marginalized communities.	Metro	Cities Counties Transportation Management Agencies Colleges & universities Community-Based Organizations Contractors
b.	Support small innovative projects to test new ideas for reaching communities of color and other historically-marginalized communities with travel options marketing and information.	Metro	Community-Based Organizations Transportation Management Agencies
c.	Provide information about ways to get involved in the RTO program targeted towards organizations that focus on reaching target communities, regardless of whether they have a transportation focus.	Metro	Community-Based Organizations
d.	Provide translation and interpretation services to partners for use in their program, and advise on culturally-competent outreach.	Metro	Community-Based Organizations
Objective 2.3: Encourage innovation and new technology to increase access to travel options.			
a.	Increase access to and awareness of new technologies by hosting forums for private sector potential partners to showcase opportunities in the region and make connections between groups.	RTO Collaborative Marketing Group	Cities Counties Transportation Management Agencies Colleges & universities Technology companies
b.	Make traveler information available to encourage private companies to better integrate travel options for users.	Metro	Cities Counties Transportation Management Agencies Colleges & universities Technology companies

Action			
Item #	Actions	Lead	Partners
c.	Pilot applications of new technologies for modes that reduce VMT (e.g., dynamic routing or enhanced traveler information capabilities for shuttles).	Metro	Transit operators Technology companies Ride share companies
Objective 2.4: Coordinate with State and local partners in planning for travel options work.			
a.	Link RTO efforts to goals outlined in the Metro Regional Transportation Plan (RTP).	Metro	RTO staff
b.	Coordinate with ODOT on commute option programs.	Metro	ODOT
c.	Support local planning work to better integrate travel options into Transportation System Plans, policies, and other local transportation decision-making.	Metro	Cities Counties
d.	Work with local jurisdictions, businesses, and partners to build local political and staff support and understanding for transportation demand management.	Metro	Cities Counties Transit operators Transportation Management Agencies Colleges & universities Private sector partners

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Action Item #	Actions	Lead	Partners
GOAL 3: IMPLEMENT A REGIONAL SAFE ROUTES TO SCHOOL PROGRAM			
Objective 3.1: Provide regional coordination and program development to support Safe Routes to School efforts throughout the region.			
a.	Provide technical assistance such as program development and strategy, interjurisdictional coordination, and other resources to assist county, city, school district, and other partners conducting local Safe Routes to School activities.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
b.	Host periodic Safe Routes to School meetings to share resources, information about policies and funding opportunities, and best practices with practitioners.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
c.	Use the Metro Safe Routes to School Framework equity analysis to prioritize funding, technical assistance, and other resource to identified underserved schools.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations Metro GIS staff
d.	Provide regional mapping and GIS support for local Safe Routes to School efforts, such as mapping previously-identified school projects, identifying high crash corridors and other barriers near schools, and designating recommended walking and biking routes to schools.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations Metro GIS staff
e.	Provide planning support to integrate education work into engineering and planning activities to leverage outreach opportunities.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts
f.	Establish a consistent data collection strategy for Safe Routes to School throughout the region, develop resources to easily collect needed data, and train practitioners on data collection and evaluation.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
Objective 3.2: Support local jurisdictions, school districts, and other partners in delivering Safe Routes to School programming.			
a.	Work with County and City partners to plan for Safe Routes to School programs and coordinate across jurisdictional and school district boundaries.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts SRTS coordinators
b.	Allocate funding to local partners based on capability and the established need for Safe Routes to School services, based on the Metro Safe Routes to School Framework equity analysis.	Metro	Cities Counties School Districts Community-Based Organizations

Action Item #	Actions	Lead	Partners
c.	Support small innovative projects to test new ideas for shifting school commute modes.	Metro	Cities Counties School Districts Community-Based Organizations
d.	Support small on-site school improvements, such as signage, striping, and bike parking.	Metro	School Districts Cities Safe Routes to School coordinators
e.	Develop implementation resources such as guidebooks, templates, curriculum, outreach materials, and trainings for partners to use.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
f.	Offer translation support for locally-produced materials and interpretation for events.	Metro	Cities Counties School Districts Community-Based Organizations
g.	Develop toolkits and purchase incentives to support local partners' hosting Safe Routes to School activities and education/encouragement events.	Metro Safe Routes to School coordinator	Cities Counties School Districts Community-Based Organizations

GOAL 4: MEASURE PROGRESS, EVALUATE IMPACTS, AND CONTINUALLY IMPROVE THE PROGRAM

Objective 4.1: Evaluate RTO grants and funded programs to pursue a suite of RTO-funded activities that collectively achieve program-wide goals.

a.	Continue using a variety of approved data to evaluate how individual program components contribute to overall program goals.	Metro RTO evaluation team	Funded partners
b.	Provide increased technical assistance, templates, and other support for data collection and reporting to partner projects.	Metro RTO evaluation team Contractors	Funded partners
c.	Continue the development of the MAE framework to allow ongoing adaptation and alignment with regional issues and opportunities.	Metro RTO evaluation team Contractors	Funded partners
d.	Pursue new technologies to collect better data on how funded projects perform.	Metro RTO evaluation team	Funded partners Technology companies

SECTION 5. IMPLEMENTATION

In spring 2018, Metro staff will work with TPAC to develop a funding allocation methodology and work plans based on the direction provided in this Strategy update. The following principles provide guidance for finalizing funding levels and for selecting partner projects.

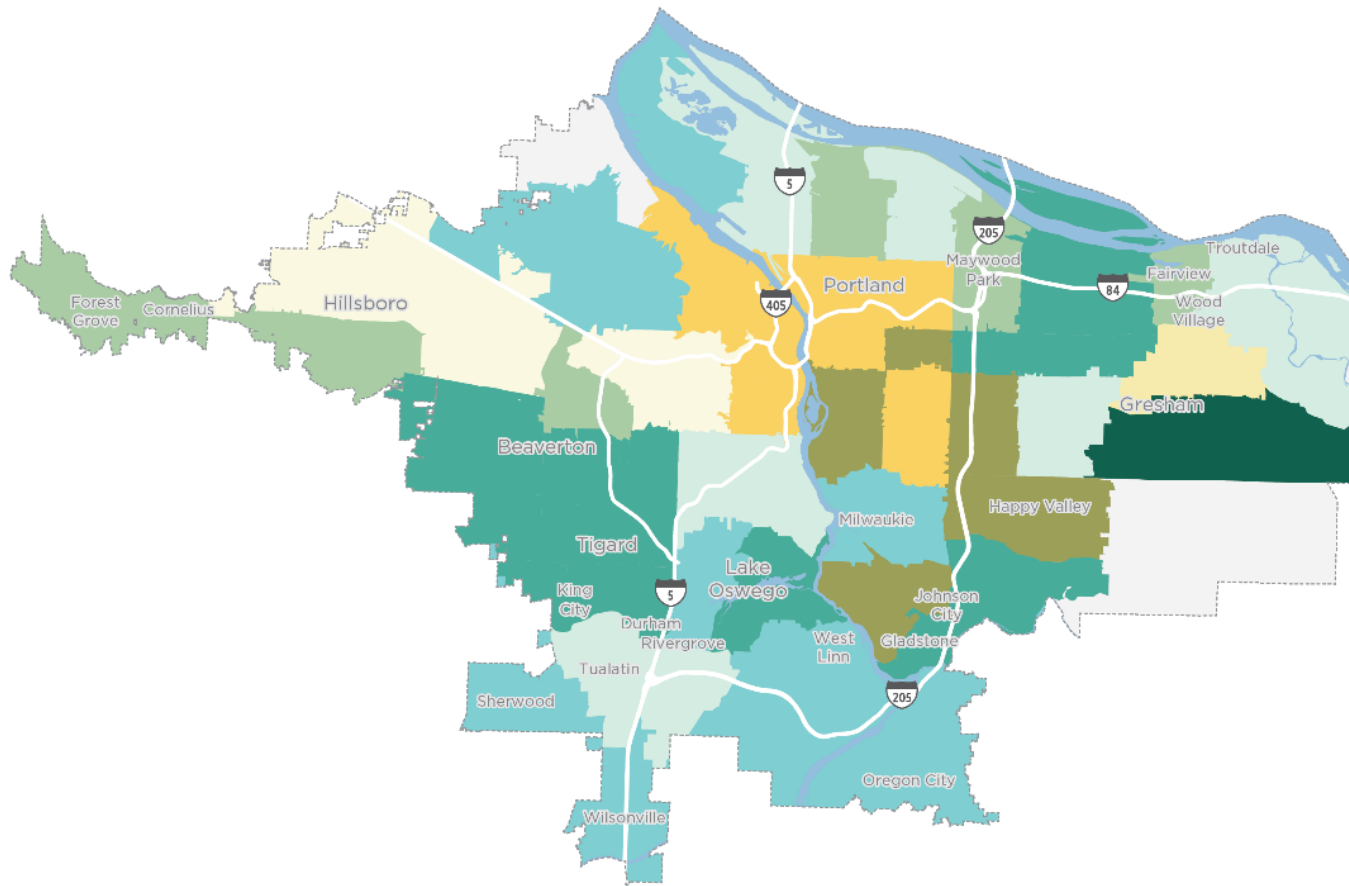


Funding Principles

Funding allocations should be based on the potential for reducing vehicle miles traveled, partners' capability and readiness, equity needs in the community served, and partner readiness for implementing the activities. Projects that meet multiple of these criteria (i.e. projects in an area with high potential for VMT reduction and that serve equity needs) should be prioritized for funding.

Potential for Reducing Vehicle Miles Traveled

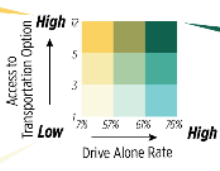
As VMT reduction is the primary goal of the RTO program, funding should be prioritized to projects with the greatest likelihood of reducing SOV trips. Travel options programs have proven the most successful in locations that have good access to travel options, such as high-frequency transit and developed and well-connected pedestrian and bicycle networks. Figure 9 shows the existing drive-alone rate compared to access to transportation options. Focusing RTO investments on areas with high drive alone rates as well as high access to transportation options has the most potential for reducing SOV trips.



**Drive Alone Rate (DAR)
Compared to Access to
Transportation Options
by Zipcode**

Areas with
high
access to TO and
low
DAR

Areas with
low
access to TO and
low
DAR



Areas with
high
access to TO and
high
DAR
(greatest opportunity for improvement)

Areas with
low
access to TO and
high
DAR

No data



Figure 9. Drive Alone Rate Compared to Access to Transportation Options in the Metro Region

Partners' Capability and Readiness for Implementing Travel Options

Metro strives to support partner agencies' capacity and growth through the RTO program. This Strategy recognizes that there is no "one size fits all" solution to integrating transportation demand management tools into an agency's practices and culture. However, best practices have been established to promote travel options as part of agencies' standard operating procedures, budgeting, and staffing plans.

Table 6 provides an index that partners can use to self-evaluate their capability and integration with regards to travel options work. A capability index brings together an approach to review common barriers to adoption. The frameworks allow for a rigorous common understanding and improvement of institutional issues that an agency faces on a continual and consistent basis.

A proposed alternative funding structure addresses past issues by providing funding to designated core RTO partners through a non-competitive basis. These core partners would be identified using the Travel Options Capability Index, a matrix partners can use to self-evaluate their capability and integration with regards to travel options work. Partners should be at Level 4 or above. For partners at Level 3 or below, a smaller pot of competitive funding would continue to be available to support their work and to potentially build their efforts to Level 4 standards and enable them to receive non-competitive funding.

Note that some communities experience funding and institutional barriers that may prohibit moving up along this index. Metro's role will be to assist partners and communities in deepening their work to support moving between levels.

In addition, this capability matrix may be less relevant to some partners, such as community-based organizations and school districts. When allocating funding and resources, Metro should also consider the organization's staffing capacity, prior obligations, relationships with the target community, and historic performance.

RTO Requirements for Public Agencies

Public agencies operate under the policies of their respective Transportation System Plans (TSPs). City and county TSPs are required to include Transportation System Management and Operations (TSMO) plans to improve the performance of existing transportation infrastructure within or through the city or county.

A TSMO plan must include transportation demand management (TDM) investments, such as individualized marketing programs, rideshare programs, and employer transportation programs. The RTO program provides support and funding to agencies so they can more fully plan and implement TDM programs.

Table 6. Travel Options Capability Index

	1 – Unaware Few or no RTO activities	2 – Exploratory Occasional, ad-hoc RTO activities	3 – Defined Basic level of RTO activities	4 – Adoptive Advanced level of RTO activities	5 – Optimized High level of RTO activities
Maturity level	Partner has no awareness or understanding of RTO, or has no plans to begin local program. Efforts to reduce auto trips are not a part of their business model.	Local program is in exploratory stage. Partner is aware of RTO, and sees value in program engagement, but has not yet committed to ongoing efforts. Is interested in or may have already participated in RTO events primarily led by others.	Initial level of program development & implementation. Partner has made an ongoing commitment to conducting one or two RTO program activities annually.	Further level of program development & implementation. Partner has partially operationalized RTO activities. Has dedicated staff responsible for conducting multiple ongoing RTO program activities.	Fully developed and mature program. Partner has fully operationalized RTO activities. Has dedicated manager + staff supporting an array of RTO program activities.
Staffing level	0.00 FTE No staff time dedicated to RTO activities	0.10-0.25 FTE RTO activities are one of several duties performed by staff (in-house or contracted).	0.25-0.50 FTE RTO activities comprise a significant portion of a staff person’s time; is considered an important function of organization.	0.50-3.00 FTE RTO activities comprise most or all of one or more staff person’s time; is considered a core function of organization.	3.00 + FTE RTO activities comprise all of multiple staff person’s duties, including; has dedicated organizational unit and manager
Local funding	No local or regional funding	Minimal level of local funding, required to pay staff and provide marketing and support event(s) or project.	Local funds provide match for RTO funds (~\$50K/yr), or RTO activities are 100% locally funded	Local funds provide match for RTO funds (\$50-100K/yr)	Local funds provide match for RTO funds (>\$100K/yr), plus additional local funding dedicated to program activities

	1 – Unaware Few or no RTO activities	2 – Exploratory Occasional, ad-hoc RTO activities	3 – Defined Basic level of RTO activities	4 – Adoptive Advanced level of RTO activities	5 – Optimized High level of RTO activities
Partnerships	No agency or NGO partners	Collaboration with partners is informal and predominantly ad hoc	Staff collaborate with key partners focused on transportation issues	Staff collaborate with a variety of partners, including non-transportation-focused NGOs	Multiple agency & NGO partnerships
Goals & objectives	None	Activities are informal, reactive, and not integrated into planning policy.	Official policy supports TO work but lacks specific details on implementation.	Policies support TO work with specific goals and actions.	Specific, documented strategic direction, aligned with local TSP, regional & state plans.
Evaluation & measurement	None	Minimal data collected, mainly qualitative	Qualitative & some quantitative data collected on most activities	Qualitative & quantitative data collected on all activities	Qualitative & quantitative data collected, analyzed and evaluated for all program activities
RTO partner status	None	May apply for sponsorship, attend CMG or other events occasionally	RTO funding recipient – applies for competitive funding on periodic basis	Core RTO partner – has agreed to performance metrics and other conditions in exchange for dedicated funding	Core RTO partner – has agreed to performance metrics and other conditions in exchange for dedicated funding. Amount may be greater than Level 4 due to greater potential for ROI



Equity Considerations

In addition to VMT reduction, Metro should focus funding on projects that address the barriers faced by communities of color, older adults, youth, and people with a disability. This Strategy identifies ways of making the program structure and resources more useful for community-based organizations, many of whom represent or work directly with communities of color, older adults, youth, and people with a disability. Some of these changes include the following:

- Create a specific, significant fund for projects that fulfill the equity goals and objectives, with options for smaller grants and a reduced administrative burden.
- Offer resources tailored for community-based organizations through the CMG, such as behavior change best practices, professional development opportunities, and outreach templates.
- Offer ways to participate in CMG and other RTO related meetings and workshops remotely.
- Continue the sponsorship program for non-profit organized events and activities that address Metro's RTO goals and objectives.
- Provide translation and interpretation to partners and advise on culturally-competent outreach.



Technology Principles

Metro should create an innovation grant program in order to test partnerships with technology providers that have the potential for supporting travel options work throughout the region. The RTO program should use the following principles to promote technological innovation:

- **Fund deployment rather than development:** Focus on funding projects that encourage widespread use of helpful technologies. Development of new technology will be left to the private sector.
- **Provide data** so the RTO program can learn and adapt to changing circumstances.
- **Foster competition:** Projects should avoid giving preferential treatment to specific platforms and companies, unless through an open competitive process.

Public agencies and non-profits should lead the way for deploying technology around the region. The RTO program will support those groups and establish a way for them to partner with private companies.

Collaborative Marketing Group

While the CMG plays an important role in the RTO program, there are opportunities to modify the existing structure to better meet the needs of a growing and changing region. Through the public engagement process included in the update of the RTO Strategy, partners provided ideas for potential improvements to the CMG.



Potential tactics to expand participation and encourage deeper partner involvement include:

- **Re-name** to more approachable, clear name
- Offer opportunities for partner organizations to conduct their own marketing campaigns and pilot projects with Metro support.
- Provide **onboarding support** for new members and information for why and how new organizations should get involved
- Offer a **variety of engagement options** particularly focused on organizations that serve target communities, but may lack a transportation-specific mission
- **Focus campaigns and resources on reaching target audiences:** communities of color, youth, older adults, and people with disabilities
- Look for opportunities to **link marketing campaigns with infrastructure improvements**
- Create a **Scholarship Fund** to support organizations with capacity challenges to attend professional development events such as conferences and workshops
- **Provide planning support** for developing TO strategies or integrating TO work into local TSPs.



Transition Plan

The changes recommended in this strategy will require local partners to make adjustments to their existing programs and initiatives in order to implement the new RTO plan. New or revised elements of the Strategic Plan will be phased in over the next year, in order to make the transition as easy as possible for partners.

Next steps over the next one to three years of the RTO program include:

Coordination and the Collaborative Marketing Group

- Consider renaming the CMG to more clearly state the purpose of the group for new participants, which is to provide travel options education and resources to residents in the greater Portland metro region by building partners' capability and expertise.
- Pursue ways of encouraging new partners to engage with the CMG, such as new participant orientation, online webinars, professional development trainings, and promotional materials explaining the benefits of participation.

- Work with partners to determine where they are on the capability matrix and where they aspire to be, and to develop next steps for deepening partners' involvement in travel options work.

Local Implementation Support

- Developing updated funding methodology and allocation process with TPAC.
- Host training and workshops to engage existing and new partners in revised local implementation funding process.
- Provide additional support to help partners develop scopes of work and project evaluation plans.



Implementing a Regional SRTS Program

- Hire SRTS support staff or contractors to coordinate the regional program and develop program materials and resources.
- Convene a regional SRTS group, building off of the National Partnership for SRTS's bi-monthly Portland Regional Practitioner's meeting, which will provide guidance and local examples for regional program materials and resources development, as well as coordinating between cities and school districts that share boundaries.
- Provide technical assistance and support for consistent data collection and baseline measurement of school travel patterns and attitudes.
- Conduct outreach to school districts by highlighting local successes and explaining the benefits of getting involved in SRTS programming.
- Focus technical assistance in communities of color directly or through local programs.

Conclusion

The 2018 RTO Strategy defines a ten-year mission, goals, and objectives to coordinate, implement, and evaluate local partners' efforts that help achieve regional air quality, transportation, equity, and livability goals. To overcome challenges experienced in the past, and to form new partnerships to better reach new audiences, this Strategy re-envisioned an RTO program that works collaboratively with local government agencies, school districts, community-based organizations, and the private sector.

This Strategy provides the guidance and approach to help Metro staff work with TPAC to define a program that is flexible and forward-thinking while attuned to the community's needs. Over the next ten years, this Strategy will guide Metro in working with community partners to create a more healthy and livable Portland region.

ATTACHEMENT A. GLOSSARY

CMAQ	Congestion Mitigation and Air Quality
CMG	Collaborative Marketing Group
ECO	Employee Commute Options
FTA	Federal Transit Administration
IM	Individualized Marketing
JPACT	Joint Policy Advisory Committee on Transportation
MAE	Multiple Account Evaluation
RFF	Regional Flexible Funds
RTP	Regional Transportation Plan
RTO	Regional Travel Options
SOV	Single Occupancy Vehicle
SRTS	Safe Routes to School
STBG	Surface Transportation Block Grant
TDM	Transportation Demand Management
TPAC	Transportation Policy Alternatives Committee
TMA	Transportation Management Association
TO	Travel Options
TSP	Transportation System Plan
VMT	Vehicle Miles Traveled

DRAFT

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

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

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503-797-1700

January 2, 2018

Memo

Date: January 8, 2018
 To: Joint Policy Advisory Committee on Transportation (JPACT) and interested parties
 From: Kim Ellis, RTP Project Manager
 Clifford Higgins, Communications Supervisor
 Subject: 2018 RTP Investment Strategy Development and Refinement

PURPOSE

The purpose of this memorandum is to update the Joint Policy Advisory Committee on Transportation (JPACT) on 2018 RTP update related work that is planned or underway, and the timing of upcoming discussions and engagement activities that will lead to adoption of the 2018 RTP and strategies for freight, safety, transit, and emerging technologies (RTx) by the end of 2018. Planned upcoming discussions for 2018 are provided in **Attachment 1**. Planned engagement activities are summarized at the end of this memo.

ACTION REQUESTED

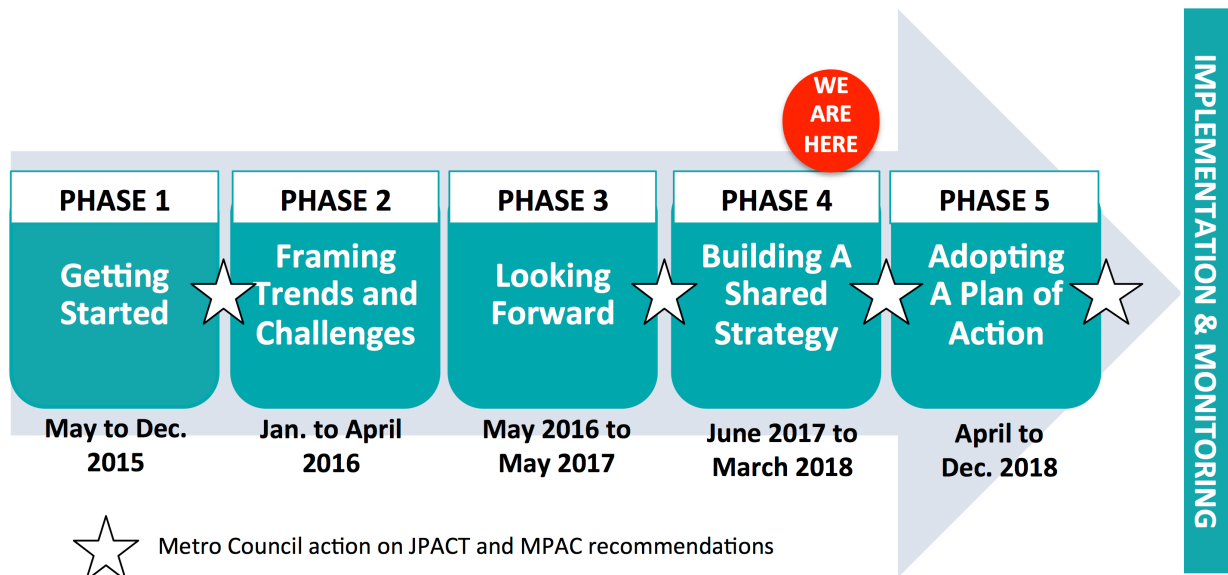
No formal action is requested. This is an opportunity for JPACT to ask questions about the work underway and planned engagement activities.

BACKGROUND

The Portland metropolitan region’s economic prosperity and quality of life depend on a transportation system that provides every person and business in the region with equitable access to safe, efficient, reliable, affordable and healthy travel options. Through the 2018 RTP update, the Metro Council is working with leaders and communities throughout the region to plan the transportation system of the future by updating the region's shared transportation vision and investment strategy for the next 25 years.

Shown in **Figure 1**, the plan update is in Phase 4 and on schedule.

Figure 1. Timeline for 2018 Regional Transportation Plan Update



In December 2016 and February 2017, the Council reaffirmed their direction to staff to use development of the 2018 RTP to clearly and realistically communicate our transportation funding outlook and align the financially constrained project list with updated financial assumptions. This direction included developing a pipeline of priority projects for the regional transportation system for Metro and other partners to work together to fund and build. The Council also directed the RTP project list and RTP modal and topical strategies be developed in a transparent way that advances adopted regional goals, supports regional coalition building efforts, and emphasizes social equity, safety and climate change. On May 30, the Council further directed staff to move forward with the 2018 RTP Call for Projects as recommended by the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT).

Since May, staff continued to implement the adopted work plan and public engagement plan, consistent with previous Council policy direction. A summary of accomplishments and activities that are underway follows.

Project list development, evaluation and refinement

- **Call for Projects completed in August.** Staff completed the initial RTP Call for Projects, working with the counties and cities, TriMet, ODOT and other agencies to update the region's project priorities based on direction provided by the Metro Council and JPACT. An interactive map of the projects submitted for evaluation and public review is now available at:

<http://drcmetro.maps.arcgis.com/apps/webappviewer/index.html?id=bd3660b8b7b347f4929edc85d758305f>

In addition, a summary and lists of the projects submitted can be downloaded from the project website at: www.oregonmetro.gov/2018projects

- **System level and transportation equity performance evaluation continues.** Metro staff is completing the technical evaluation, using the updated evaluation framework agreed upon by JPACT and the Metro Council in May.

Through the end of 2017, staff reviewed the results with the technical work groups, TPAC and MTAC to develop findings for public review and discussion by JPACT, MPAC and the Metro Council in early 2018. Multnomah County and the Oregon Health Authority staff are completing a health impact assessment of the draft RTP projects. This information will be presented to TPAC and MTAC when available.

In addition, staff are preparing a discussion guide for policymakers that summarizes what was evaluated and findings from the evaluation. The final discussion guide will be available in February, in advance of Regional Leadership Forum #4. Based on feedback from TPAC and MTAC discussions, the guide will provide information on what was evaluated and how the different investment strategies performed, with comparisons to the adopted Climate Smart Strategy to the extent possible.

- **Assessment of the pilot project evaluation continues.** Metro staff summarized comments received from partner agencies on the pilot evaluation for initial discussion at a Dec. joint MTAC/TPAC/RTP Work Groups workshop. Through the end of 2017, staff reviewed the assessment and agency comments with the Performance Measure work group, TPAC, and



Updated RTP Evaluation Framework
advances how we measure outcomes to inform priorities

MTAC, and develop recommendations for refinements. Proposed refinements to the project evaluation process and criteria will be brought forward for discussion by policymakers in early 2018 in advance of the draft project list refinement and final evaluation.

- **Refinement of draft RTP project lists.** Planning for the project list refinement period is underway. In March, staff will seek MPAC and JPACT endorsement of key takeaways from the Regional Leadership Forum #4 and 2018 RTP project priorities to inform refinement of the draft RTP project lists, with a focus on the first 10 years of the draft RTP investment strategy. The endorsement will inform Council direction to staff to work with jurisdictional partners to finalize the draft RTP projects lists for final public review and evaluation during summer 2018. The project list refinement period is planned for late March to late April. More information on the approach for updating the RTP Project Hub data and submitting updated project lists will be provided at a future meeting.

Policy and technical updates

- **Goals, objectives, performance targets and policies review underway.** Recognizing this RTP update has an increased focus on addressing safety, equity and climate change, the adopted work plan calls for the policy framework to be reviewed and updated to more fully address these and other issues of concern identified through the process (e.g., congestion, maintenance, emerging technologies and funding). Last May, JPACT and the Metro Council directed staff to review and refine the RTP policy chapter, including:
 - **Review of RTP goals and objectives,** particularly goals related to safety, equity, climate change, accountability, transparency, congestion, maintenance, emerging technologies and funding. The review will seek to:
 - clarify the distinction between the vision, goals, objectives, performance targets and policies and their role in performance-based planning and decision-making;
 - reduce redundancy between the goals and objectives;
 - reflect priority outcomes identified through the process; and
 - better align the objectives with existing or desired data, including updated system evaluation and transportation equity measures and updates to the RTP performance targets to meet regional goals and federal and state requirements.
 - **Review of performance targets** to meet regional policy goals and federal and state requirements. The review will seek to:
 - clarify and update definitions and terms related to performance-based planning and measurement;
 - identify gaps in existing performance targets and opportunities to reduce redundancy;
 - update performance targets;
 - streamline how the 2018 RTP addresses state and federally-required target-setting and on-going performance monitoring, and reporting; and
 - define an action plan for system monitoring, including an approach to data collection, maintenance, sharing, and methods development.
 - **Review of modal policies and maps,** particularly the throughways/arterials, transit, and freight policies and system maps for each network. This review will seek to:
 - compile recommended changes to RTP system maps;
 - add a new freight safety policy;
 - expand policies for transit to reflect desired ridership, accessibility, convenience, frequency, reliability, and affordability performance outcomes;
 - expand policies for throughways and arterials to reflect desired access/connectivity, reliability and safety performance outcomes;
 - update relevant design policies;
 - draft new policy sections related to address safety, equity, climate change, and emerging technologies; and

- clarify the distinction between the modal policies in the RTP and modal strategies in the Regional Transit Strategy, Regional Freight Strategy and Regional Safety Strategy that are being developed concurrent with updating the RTP.

The regional bike and pedestrian network policies will not be subject to this review because they were extensively reviewed and updated as part of the 2014 Regional Active Transportation Plan. The system maps may be updated to reflect additions or updated functional classification designations stemming from local transportation plan updates and the RTP Call for Projects.

TPAC and MTAC will discuss initial findings and recommendations from this review at their February meetings. Discussions are expected to continue in 2018. JPACT and MPAC will have an opportunity to discuss recommended policy chapter changes in May as part of the draft RTP discussion.

- **Financially constrained funding assumptions updates to reflect House Bill 2017 underway.** Metro staff will participate in an ODOT-led working group tasked with updating the state transportation revenue forecast. An updated forecast is anticipated in Spring 2018. Council and JPACT will discuss the updated forecast when available.
- **Update to RTP implementation chapter to begin in 2018.** Metro staff will begin work to update the implementation chapter in early 2018. This chapter outlines future studies and other work needed to advance implementation of the RTP or resolve issues that could not be fully addressed during the update. This will include updating sections on needed regional mobility corridor refinement plans, planned project development activities (e.g., Southwest Corridor and Division Transit Project), performance monitoring, and other implementation activities to be undertaken post-RTP adoption. TPAC and MTAC will discuss staff recommendations for updates to this chapter in March 2018. Discussions are expected to continue in 2018. JPACT and MPAC will have an opportunity to discuss recommended implementation chapter changes in May as part of the draft RTP discussion.
- **Development of a transportation recovery and disaster preparedness element underway.** Metro staff will partner with Portland State University and the Regional Disaster Preparedness Organization (RPDO) to map previously identified regional emergency transportation routes and prepare recommendations for future work and partnerships needed to more fully address this issue prior to the next RTP update (due in 2023). TPAC and MTAC will discuss the identified regional emergency transportation routes and recommendations for future work in early 2018.

Modal and topical strategies development

- **Development of the Regional Transit Strategy continues.** Staff continue to work with the Transit Work Group to develop a draft strategy, update the System Expansion Policy and define Enhanced Transit Concept (ETC) pilot corridors to advance to project development funded by the 2019-21 Regional Flexible Funds Allocation (RFFA). TPAC discussed a proposed approach to the ETC pilot work at the October meeting, including working with County Coordinating Committees to identify the potential universe of Enhanced Transit locations to inform upcoming jurisdictional workshops. TPAC and MTAC will discuss a technical review draft transit strategy at their April 2018 meetings and receive periodic updates on the ETC work. The Metro Council, MPAC and JPACT will discuss the draft strategy in April and May 2018, before it is released for public review in June.
- **Update to the Regional Transportation Safety Strategy continues.** Staff finalized work with the Safety Work Group to develop a draft strategy for technical review. TPAC and MTAC discussed a technical review draft safety strategy at their November 2017 meetings. The Metro

Council, MPAC and JPACT will discuss the draft strategy in February and March 2018, before it is released for public review in June.

- **Update to the Regional Freight Strategy continues.** Staff finalized work with the Freight Work Group to develop a draft strategy. TPAC and MTAC discussed a technical review draft freight strategy at the January 3 joint TPAC/MTAC workshop. The Metro Council, MPAC and JPACT will discuss the draft strategy in April 2018, before it is released for public review in June.
- **Development of a policy framework and strategy for emerging transportation technologies (RTX) continues.** TPAC and MTAC discussed a proposed approach to this work at their September meetings, and discussed draft policies at the January 3 joint TPAC/MTAC workshop. The technical committees will discuss draft policies and strategies at their April 2018 meetings. The Metro Council, MPAC and JPACT will discuss a draft strategy in May 2018, before it is released for public review in June.
- **Update to Designing Livable Streets and Trails Guide continues.** Staff continue to work with the Design Work Group to update existing design practices. TPAC and MTAC received updates at their November meetings and will review proposed changes to regional design classifications maps in June 2018.

Engagement and outreach

- **Planning for 2018 public engagement and outreach activities continues.** In Jan. 2018, the draft investment priorities submitted by agencies along with findings from the evaluation will be shared with the general public for input during a planned 30-day comment opportunity. A community leaders forum will be held and targeted business outreach will occur during this period. The fourth (and final) Regional Leadership Forum is planned for Friday, March 2, 2018. The forum will be an opportunity for the Metro Council, JPACT, MPAC and invited business and community leaders to discuss public input, updated funding information and the results of the technical evaluation. Policy makers' discussions will be facilitated to articulate the 2018 RTP project priorities, particularly to identify desired project list refinements for the first 10 years of the RTP project list to better achieve regional goals for safety, equity, climate change, reliability and others.

Final public review and adoption process

- **Planning of the final 45-day public review period and adoption process is underway.** In June, staff will seek Council direction to release the Draft 2018 RTP and draft strategies for freight, transit, and safety for public review and comment. The comment period is planned for June 29 to Aug. 13 (pending legal staff review). The comment period will include a public hearing and consultation with tribes and federal and state agencies.

In early fall TPAC and MTAC will be asked to identify remaining policy issues to be discussed by MPAC, JPACT and the Metro Council prior to adoption of the 2018 RTP and strategies for freight, transit, and safety. The 2018 RTP will be adopted by Ordinance as a land use action to meet federal and state requirements. The strategies for freight, transit, safety, and emerging technologies (RTx) will be adopted by Resolution.

MTAC and TPAC will be requested to make final recommendations to MPAC and JPACT, respectively, in September. MPAC and JPACT will be requested to make final recommendations to the Metro Council in October. The Council is anticipated to consider final action on 2018 RTP (by Ordinance) and strategies for freight, transit, and safety (by separate Resolutions) on December 6, 2018.

More information about final public review and adoption process will be provided at a future meeting.

2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

(dates are subject to change)

Month	Who	When	What
January	TPAC/MTAC workshop	1/3	<ul style="list-style-type: none"> Draft RTX policy language development Draft RTO Strategy discussion Technical review draft of freight strategy
	TPAC	1/5	<ul style="list-style-type: none"> 2018 RTP engagement activities and RLF #4 RTP Schedule and Findings Update
	Comment opportunity	1/16 to 2/12	<ul style="list-style-type: none"> 30-day on-line public comment opportunity on draft RTP investment priorities
	TEA work group	1/11	<ul style="list-style-type: none"> Updated draft Equity definition and policy framework Equity analysis findings Work group wrap-up
	MTAC	1/17	<ul style="list-style-type: none"> Draft RTX policies
	JPACT	1/18	<ul style="list-style-type: none"> Update on Technical Evaluation and Schedule for Finalizing the 2018 RTP 2018 RTP Engagement and Regional Leadership Forum #4
	Community leaders forum	1/19	<ul style="list-style-type: none"> Draft RTP Project Priorities and Evaluation Findings Community response on draft RTP investment priorities
	MPAC	1/24	<ul style="list-style-type: none"> Update on Technical Evaluation and Schedule for Finalizing the 2018 RTP 2018 RTP Engagement and Regional Leadership Forum #4
February	TPAC	2/2	<ul style="list-style-type: none"> Draft RTX policies
	TPAC/MTAC workshop	2/7	<ul style="list-style-type: none"> Draft RTP Policy Chapter Changes
	Metro Council	2/13	<ul style="list-style-type: none"> RTP Evaluation Findings discussion guide and update on RLF #4 Draft RTX policies
	MPAC	2/14	<ul style="list-style-type: none"> RTP Evaluation Findings discussion guide and update on RLF #4
	JPACT	2/15	<ul style="list-style-type: none"> RTP Evaluation Findings discussion guide and update on RLF #4 Draft RTX policies
	Metro Council	2/27	<ul style="list-style-type: none"> Draft Safety Strategy
	MPAC	2/28	<ul style="list-style-type: none"> Draft RTX policies
March	Regional Leadership Forum #4	3/2	<ul style="list-style-type: none"> Shaping the final RTP <ul style="list-style-type: none"> System evaluation and equity analysis findings Public feedback on draft RTP investment priorities Community leaders' feedback on draft RTP investment priorities
	TPAC/MTAC workshop	3/7	<ul style="list-style-type: none"> Pilot project evaluation criteria refinement Technical review draft of transit strategy
	TPAC	3/9	<ul style="list-style-type: none"> RLF #4 Takeaways and 2018 RTP investment priorities Draft RTP Policy Chapter Changes Draft RTP Implementation Chapter
	Metro Council	3/13	<ul style="list-style-type: none"> Draft RTP Policy Chapter Changes (focus on goals and objectives) Pilot project evaluation findings
	MPAC	3/14	<ul style="list-style-type: none"> Draft Safety Strategy RLF #4 Takeaways and 2018 RTP investment priorities – endorsement requested
	JPACT	3/15	<ul style="list-style-type: none"> Draft Safety Strategy RLF #4 Takeaways and 2018 RTP investment priorities –

2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

(dates are subject to change)

Month	Who	When	What
			endorsement requested
	Metro Council	3/20	<ul style="list-style-type: none"> • RLF #4 Takeaways and 2018 RTP investment priorities – direction requested
	MTAC	3/21	<ul style="list-style-type: none"> • Draft RTP Policy Chapter Changes • Draft RTP Implementation Chapter
April	TPAC/MTAC workshop	4/4	<ul style="list-style-type: none"> • Transportation Resiliency and Emergency Routes • MAP-21 Performance Monitoring, Target Setting and Reporting • Technical review draft RTP
	TPAC	4/6	<ul style="list-style-type: none"> • Refining 2018 RTP project priorities (jurisdictional updates due by April 29) • Draft Transit Strategy • Technical review draft RTX Strategies and Policies
	Metro Council	4/10	<ul style="list-style-type: none"> • Draft Transit Strategy • Draft Freight Strategy
	MTAC	4/18	<ul style="list-style-type: none"> • Draft Transit Strategy • Technical review draft RTX Strategies and Policies
	JPACT	4/19	<ul style="list-style-type: none"> • Draft Freight Strategy
	MPAC	4/25	<ul style="list-style-type: none"> • Draft Freight Strategy
	May	Metro Council	5/1
TPAC/MTAC workshop		5/2	<ul style="list-style-type: none"> • Designing Livable Streets
TPAC		5/4	<ul style="list-style-type: none"> • Draft RTP (focus on policy and implementation chapters)
MPAC		5/9	<ul style="list-style-type: none"> • Draft Transit Strategy • Draft RTX Strategies and Policies
MTAC		5/16	<ul style="list-style-type: none"> • Draft RTP (focus on policy and implementation chapters)
JPACT		5/17	<ul style="list-style-type: none"> • Draft RTP (focus on policy and implementation chapters) • Draft Transit Strategy • Draft RTX Strategies and Policies
MPAC		5/23	<ul style="list-style-type: none"> • Draft RTP (focus on policy and implementation chapters)
June	TPAC	6/1	<ul style="list-style-type: none"> • Draft RTP, if needed • RTP Livable Streets and Design Classification Map Update
	MTAC	6/20	<ul style="list-style-type: none"> • Draft RTP, if needed • RTP Livable Streets and Design Classification Map Update
	Metro Council	6/21	<ul style="list-style-type: none"> • Direction to staff to release Draft 2018 RTP and draft strategies for freight, transit, and safety for public review
	Comment period begins	6/29	<ul style="list-style-type: none"> • 45-day public comment period on Draft 2018 RTP and draft strategies for freight, transit, and safety, including public hearings (June 29 to Aug. 13)
July			<ul style="list-style-type: none"> • 45-day public comment period continues, including public hearings and consultation with tribes and federal and state agencies
August	TPAC	8/3	<ul style="list-style-type: none"> • Discuss public comments and frame policy issues for JPACT discussion
	Comment opportunity ends	8/13	<ul style="list-style-type: none"> • 45-day public comment period ends

2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

(dates are subject to change)

Month	Who	When	What
	MTAC	8/15	<ul style="list-style-type: none"> Discuss public comments and frame policy issues for MPAC discussion
September	TPAC	9/7	<ul style="list-style-type: none"> Discuss public comments and policy issues identified for JPACT discussion – Recommendation to JPACT
	MTAC	9/12	<ul style="list-style-type: none"> Discuss public comments and policy issues identified for MPAC discussion – Recommendation to MPAC
	Metro Council	9/18	<ul style="list-style-type: none"> Discuss public comments and policy issues identified for JPACT and MPAC discussion
	JPACT	9/20	<ul style="list-style-type: none"> Discuss TPAC recommendation
	MPAC	9/26	<ul style="list-style-type: none"> Discuss MTAC recommendation
October	MPAC	10/10	<ul style="list-style-type: none"> Recommendation to Council on adoption of 2018 RTP and strategies for freight, transit, and safety
	JPACT	10/18	<ul style="list-style-type: none"> Recommendation to Council on adoption of 2018 RTP and strategies for freight, transit, and safety
November	Metro Council	11/6	<ul style="list-style-type: none"> Discuss JPACT and MPAC recommendations and provide direction to staff on finalizing adoption package for Council consideration
December	Metro Council	12/6	<ul style="list-style-type: none"> Consider final action on 2018 RTP (by Ordinance 18-XXXX) and strategies for freight, transit, and safety (by Resolution)

Materials following this page were distributed at the meeting.

MAX Red Line Extension and Reliability Improvements Project

Project Briefing to JPACT

January 18, 2018

Project Goals

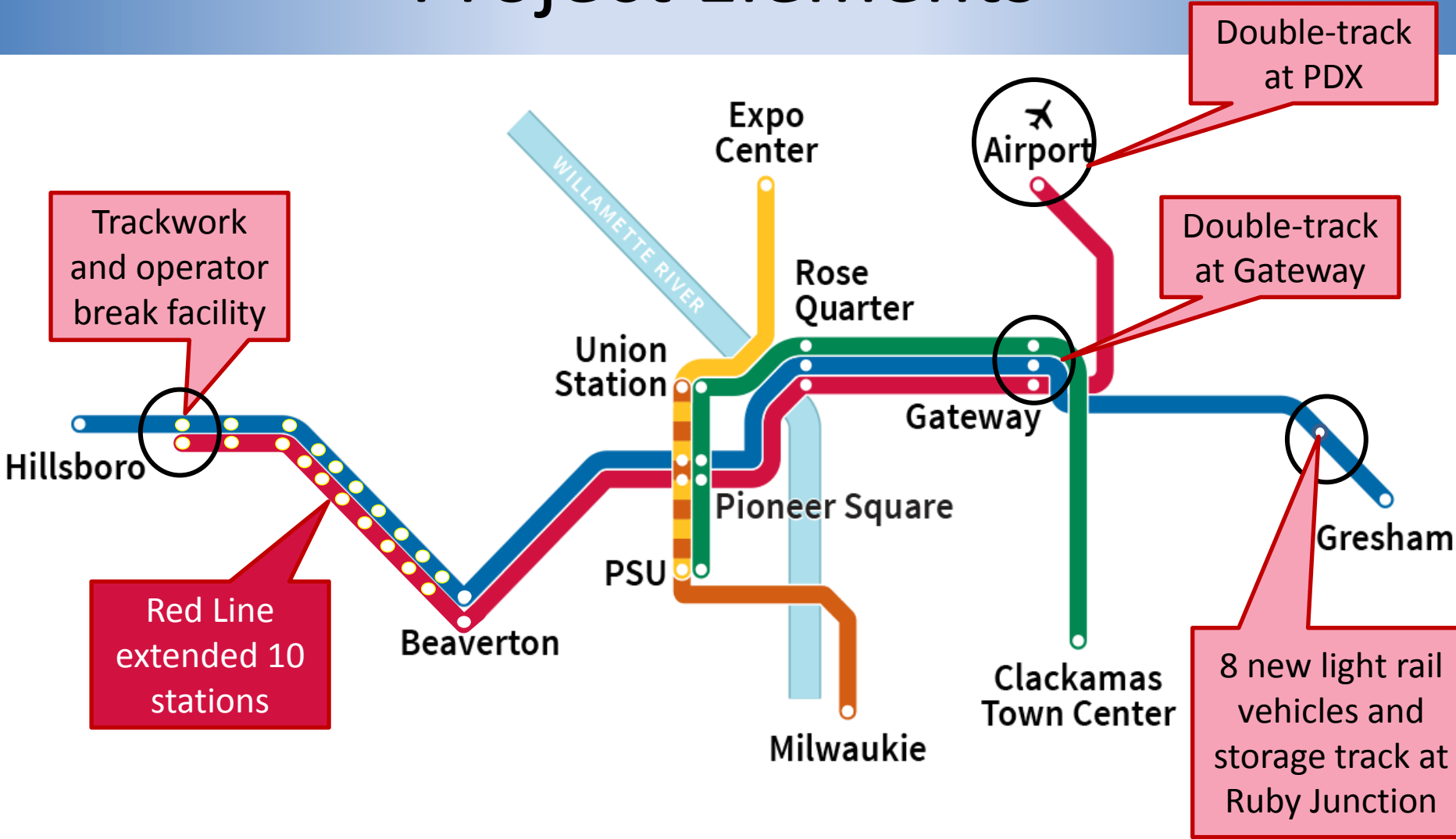
1. **Extend Red Line** west of Beaverton Transit Center

- Provide more service to Hillsboro and Beaverton
- Fulfill community desires for direct connection to Airport

2. Allow extension to operate **reliably**

- Fix two major sources of delay on the Red Line
- Improve reliability for the entire system

Project Elements



Why these elements together?

- Extension to FairPlex identified in the Westside Service Enhancement Plan
- Gateway and PDX single-track sections contribute to reliability challenges for Red Line
- Building the double-track sections at the same time as the improvements needed for the extension will allow the Red Line extension to operate reliably

FairPlex– Proposed Improvements

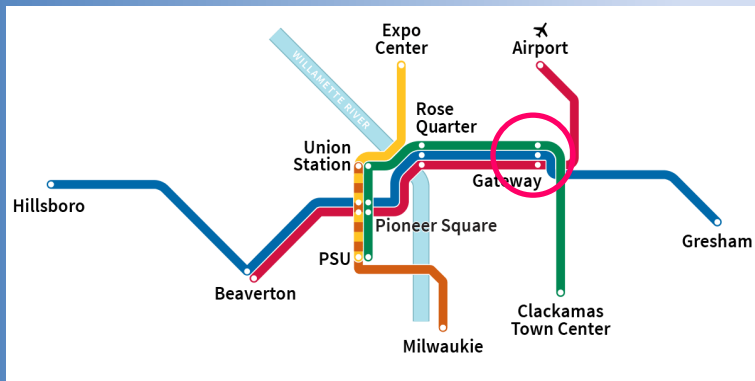
Conceptual
Illustration – Not
Drawn to Scale

Track, switch work,
and signalization
to allow use of
existing pocket
track

New operator
break facility



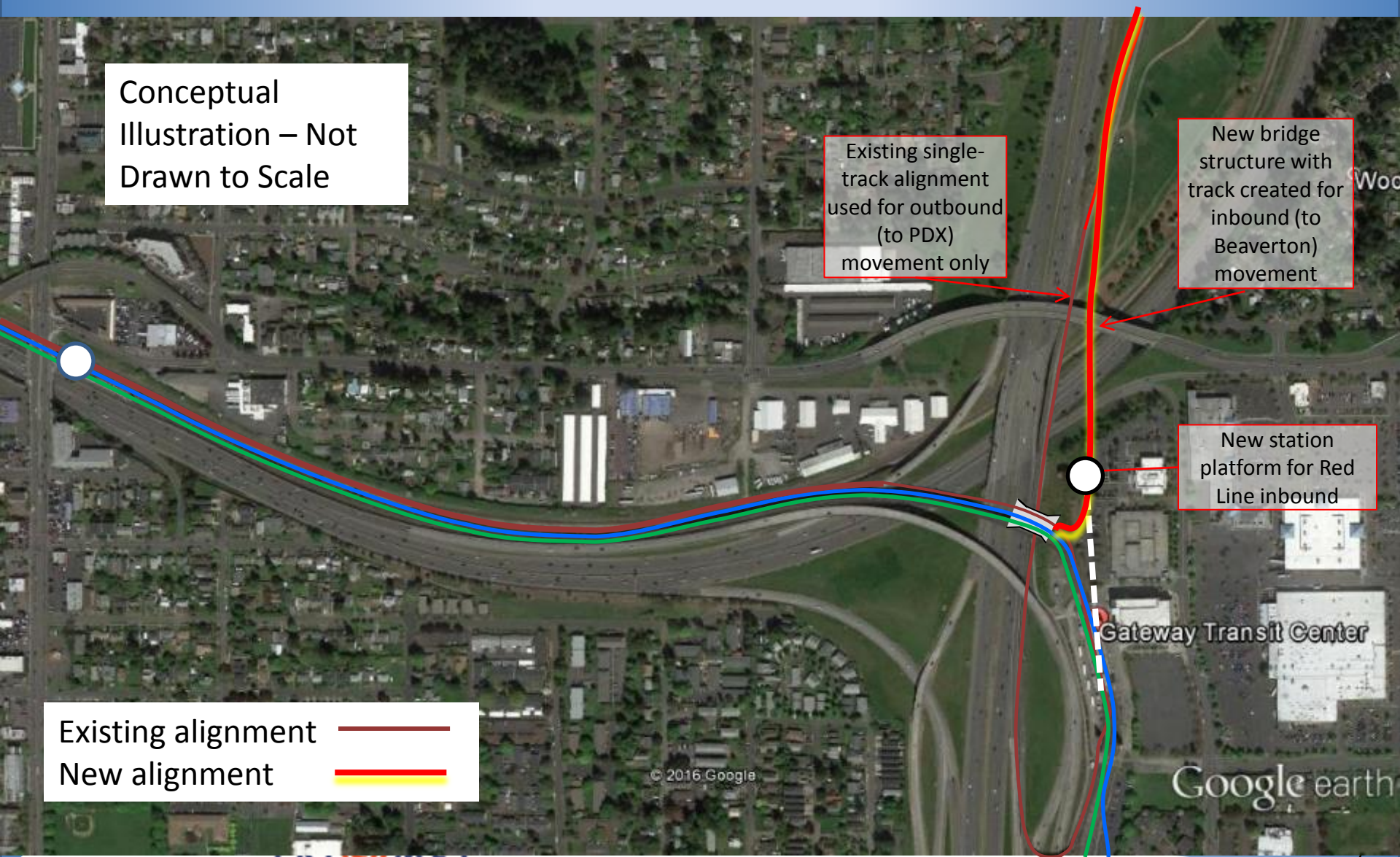
Gateway – Existing Single Track Section



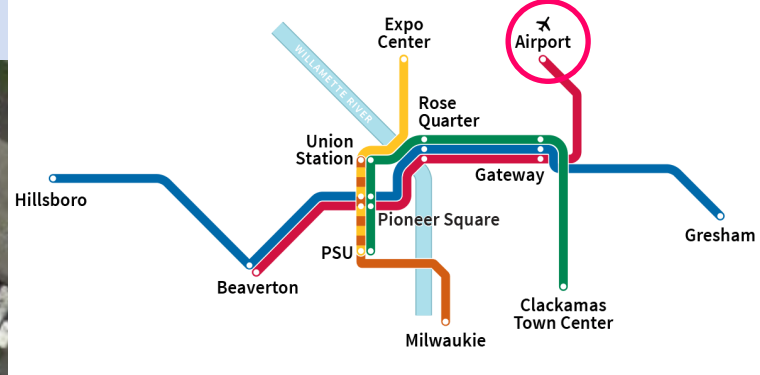
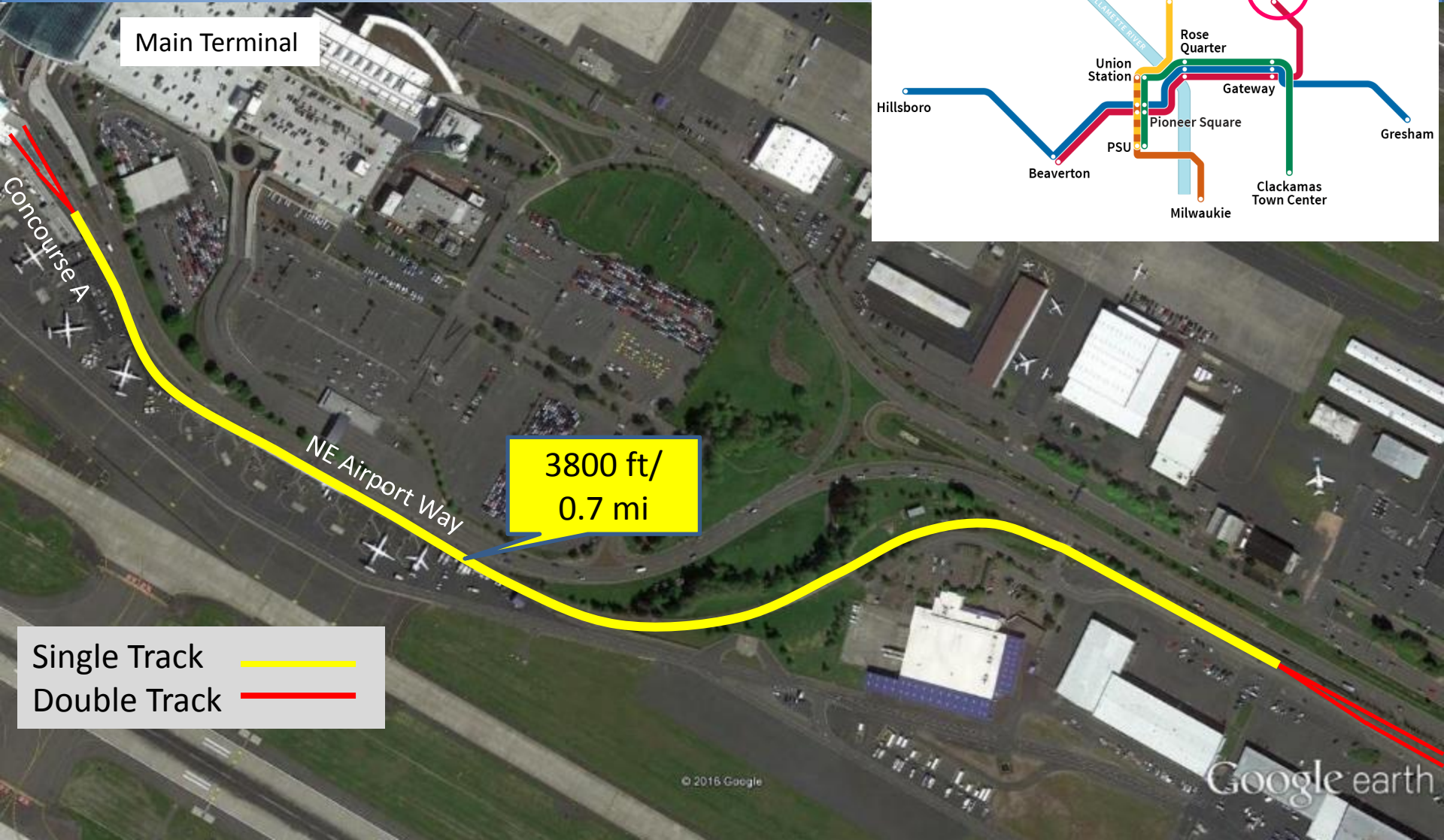
Single Track —
 Double Track —




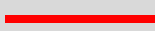
Gateway - Proposed Double Track



PDX - Existing Single Track Section



3800 ft/
0.7 mi

Single Track 
Double Track 

PDX - Proposed Double Track



Conflicts:
-IB Red w/ OB Red
-OB Red w/ IB Red

Conflicts:
-IB Red w/ OB Red
-OB Red w/ IB Red

Add second track

Community Engagement Process

- Partner agency engagement began summer 2017
- Public outreach process began fall 2017
- Continued partner agency engagement and public outreach expected to continue in 2018
- JPACT and Metro Council will be asked to adopt into 2018 RTP

Project Funding and Timeline

- Total project cost currently estimated at \$205M
- TriMet anticipating a request of \$100M from FTA Small Starts
- Local funding expected to come from TriMet General Fund over a series of years

Conceptual Project Timeline

- Enter Project Development for Small Starts in 2018
- Submit application for a rating in 2018
- 30% design by fall 2018
- NEPA complete by spring 2019
- Begin construction 2019/2020
- Opening in 2021/2022



2018 DRAFT Regional Travel Options Strategy

Presentation to JPACT – January 18, 2018

Today's purpose and discussion questions

Purpose: Gather input on the DRAFT RTO Strategy prior to Stakeholder Comment opportunity

Discussion Questions:

- Does the Strategy, particularly the goals, align with and support regional policy?
- Does the Strategy provide a solid framework for supporting local partnerships and catalyzing program growth?

Regional Travel Options is...

- A collective regional effort that gets people to carshare and carpool, or use transit and Active Transportation more
- 20 + years of history, results, evaluation, refinement
- Metro provides funding and technical support for partners' work to encourage and educate the public
- Funding from RFFA and ODOT: \$3.2M annually

RTO Partners

- ODOT, DEQ
- TriMet, Wilsonville SMART
- Clackamas, Multnomah, Washington Counties
- Cities of Portland, Gresham, Hillsboro, Beaverton, Tigard, Milwaukie, Lake Oswego, Forest Grove
- Tualatin Hills Parks & Rec., Hillsboro Parks & Rec. Districts
- Clackamas Community College, Portland Community College, Portland State University, Beaverton School District, Portland Public Schools
- Go Lloyd, Westside Transportation Alliance, Explore Washington Park, The Street Trust, Community Cycling Center, Oregon Walks, Verde, Ride Connection
- And more...

Gathering input: Spring-Fall 2017

- TPAC input
- JPACT presentation
- Best practice review
- 5 stakeholder workshops
- 17 peer interviews



What's informing the 2018 Strategy?

- Updated RTP (2014 and 2018 in progress)
- Equity strategic plan
- Policy direction: CSS, SRTS
- RTO program evaluations and surveys

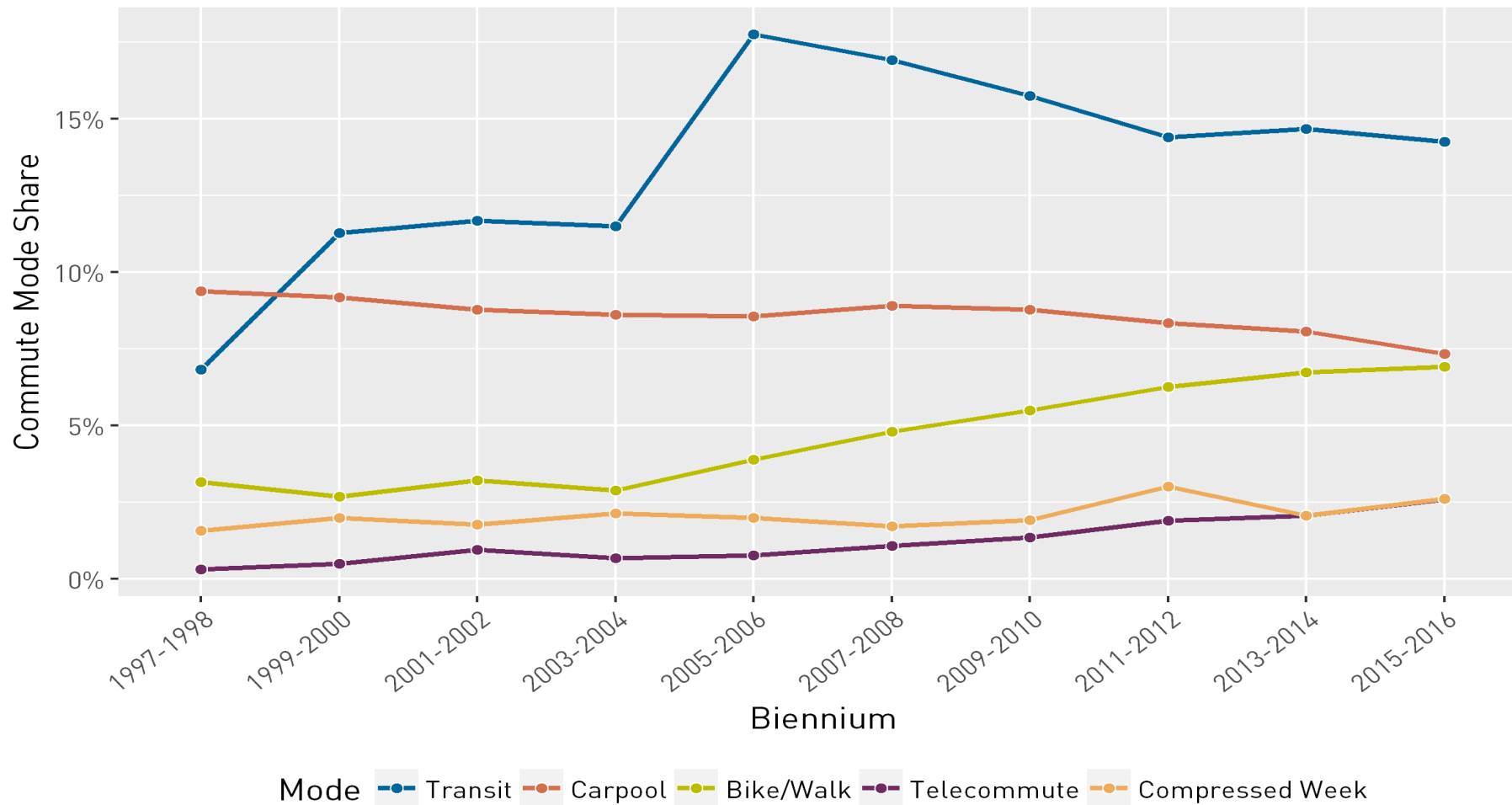


Strategic plan to advance racial equity, diversity and inclusion

Regional Transportation Plan goals

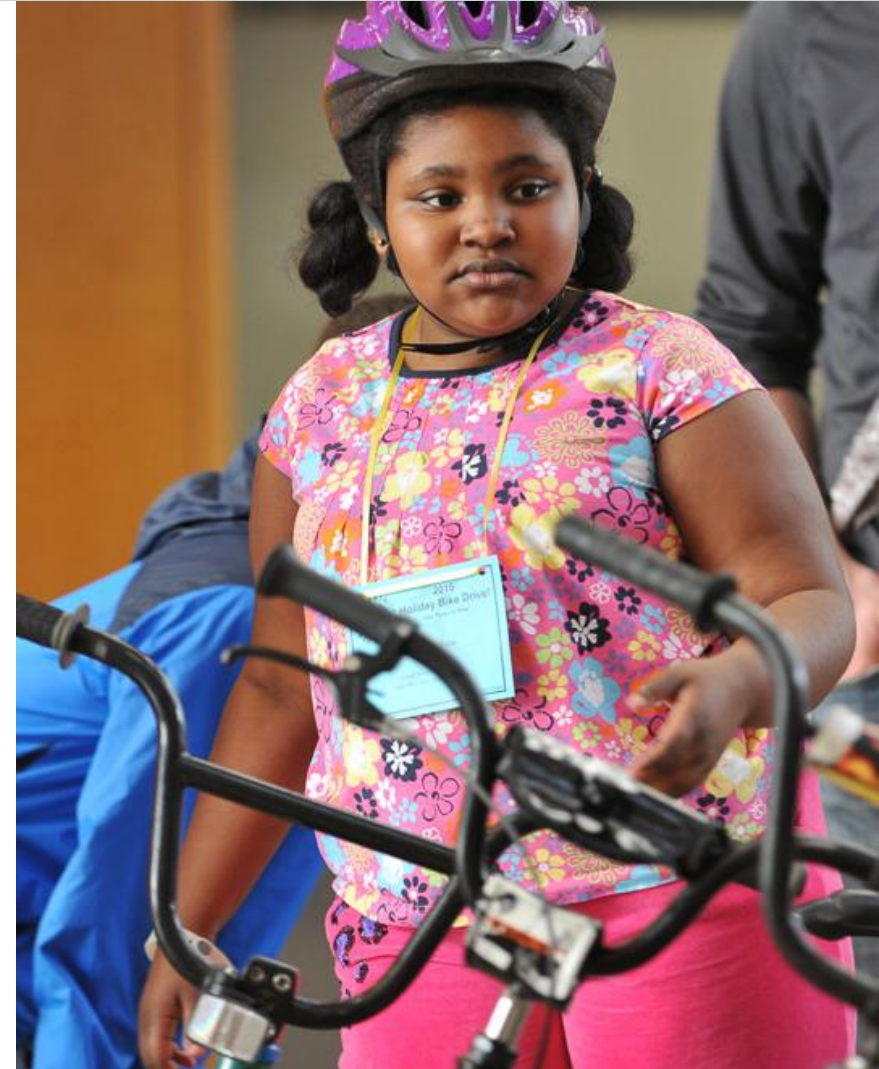
- Expand Transportation Choices
- Emphasize Effective and Efficient Management of the Transportation System
- Promote Environmental Stewardship
- Enhance Human Health
- Demonstrate Leadership on GHG Reduction
- Ensure Equity

Commute mode split increase is tapering off



Issues to address in 2018 Strategy

- Program outcomes have flattened out
- Significant numbers of people still not benefiting from program; more partnerships needed
- Need to build SRTS program
- How to use technology



What we heard from program stakeholders

- Simplify the funding process; 3-yr funding cycle
- Tactically invest in continuing successful programs while creating and supporting new leadership to begin and grow new efforts
- Look for new ways to use existing technology; create opportunities to test new ideas

Safe Routes to School stakeholder input

1. Increase regional support for coordination and technical assistance
2. Convene practitioners' meetings to leverage local efforts and build capacity
3. Fund direct program delivery through county, city, and/or district-based SRTS coordinators



2018 RTO Strategy Goals

- ~~1. Reduce Vehicle Miles Traveled~~ *Increase access to and use of travel options to reduce vehicle miles traveled, provide cleaner air and water, improve health and safety, and ensure people have choices for travelling around the region*
2. Expand the RTO program to effectively reach existing and new audiences
3. Implement a regional Safe Routes to School program
4. Measure program, evaluate impacts, and continually improve the program

Adoption schedule

January

- 3: TPAC workshop
- 18: JPACT presentation

February

- 5-23: 2nd Draft Strategy, Stakeholder public comment

March

- 9: Final Draft, TPAC request for rec. to JPACT

April

- 19: Request JPACT action

May

- XX: Request Council action

Next steps – Spring/Summer 2018

- Work with TPAC and partners to develop funding allocation revisions
- Create Safe Routes to School program structure
- Project selection
- Funding agreements put in place



Today's purpose and discussion questions

Purpose: Gather input on the DRAFT RTO Strategy prior to Stakeholder Comment opportunity

Discussion Questions:

- Does the Strategy, particularly the goals, align with and support regional policy?
- Does the Strategy provide a solid framework for supporting local partnerships and catalyzing program growth?



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**2018 Regional Transportation Plan
Update on Evaluation and Engagement
JPACT | January 18, 2018**

Regional Transportation Plan



Metro

Sets the course for moving the region safely, reliably and affordably for decades to come

Establishes priorities for federal, state and regional funding

Required at least every 4 years



Challenges to our economic prosperity and quality of life



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- Aging infrastructure
- Growing congestion, less reliability for people and freight
- Fatal and serious injury crashes
- Earthquake vulnerability
- Social inequity and disparities
- Gaps in transit, biking and walking connections
- Housing and transportation affordability and displacement
- Climate change and air quality
- Emerging technologies



2018 RTP Quick Poll Surveys (2015 and 2016), Regional Snapshots on Transportation (2016-17), technical work groups and regional advisory committee discussions (2016-17) and Regional Leadership Forums 1, 2 and 3 (2016)

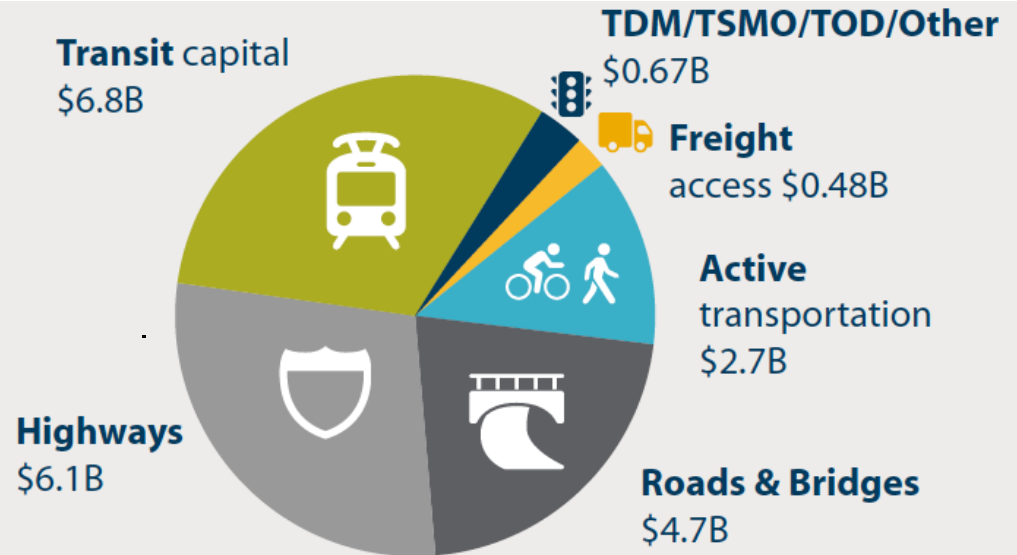
Draft 2018 RTP project priorities



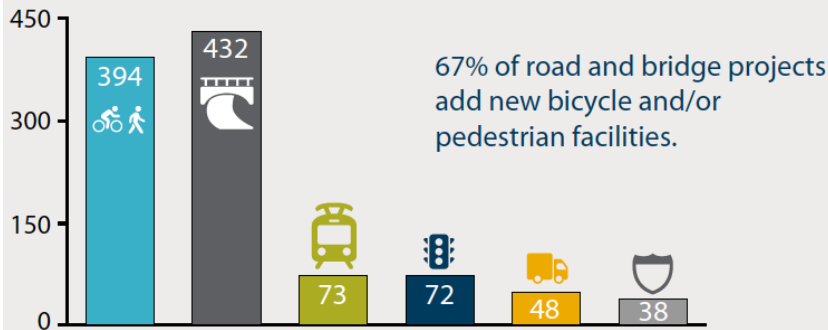
Cost by investment category in rounded billions, 2016 dollars

Summary of all capital projects submitted for evaluation and public review. Road and transit operations and maintenance costs to be added.

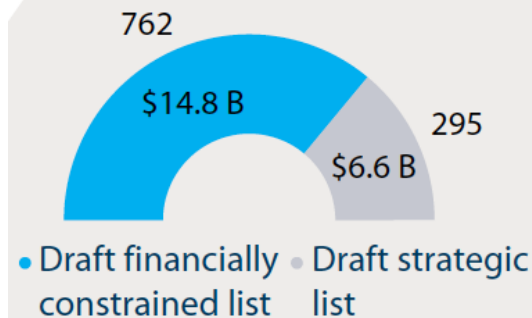
Total: **\$21.4 billion**



Projects by investment category



Capital investments

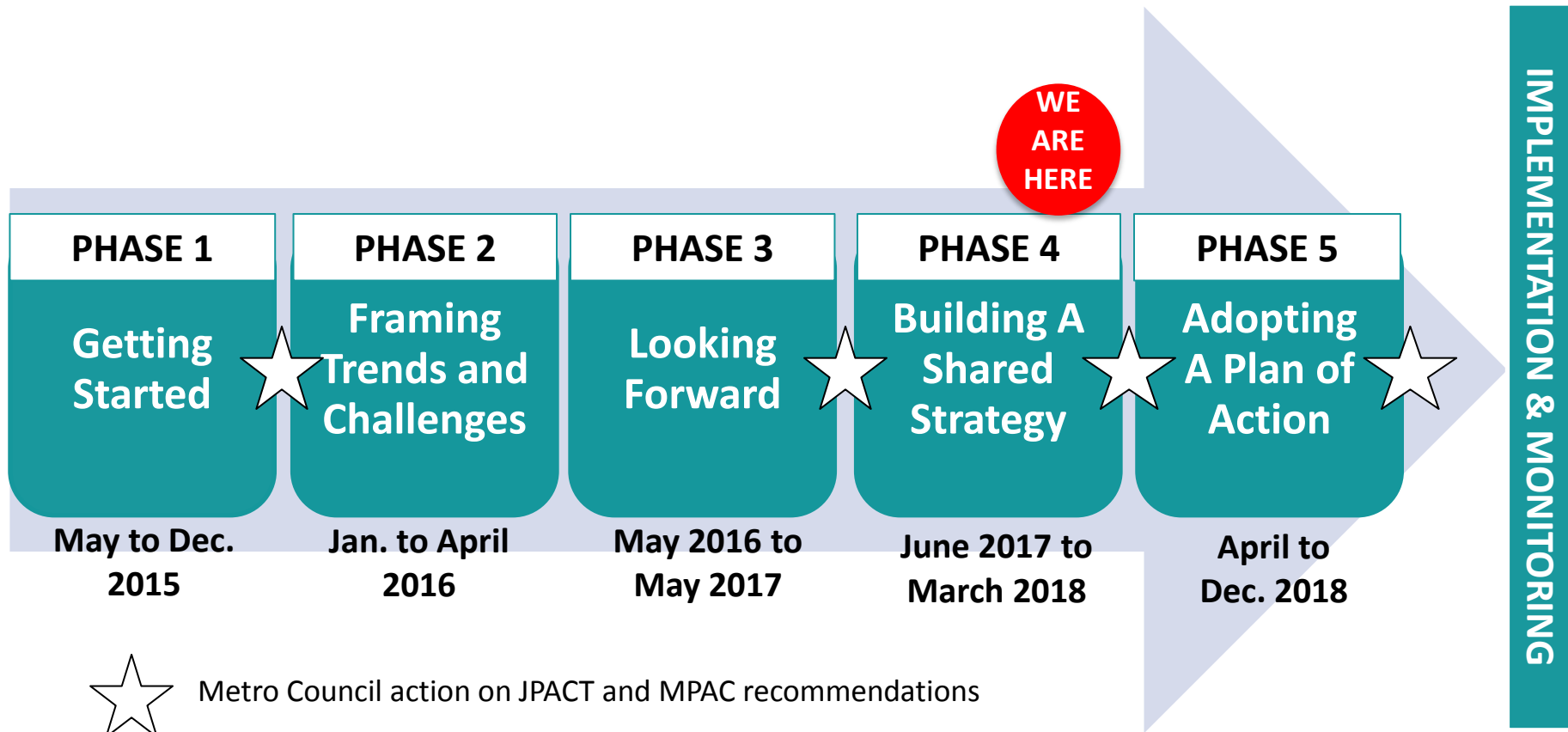


View the interactive map and download proposed projects at: oregonmetro.gov/2018projects

Project timeline



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February and March discussions



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Takeaways from the technical evaluation and public response to draft project priorities

Affirm direction to staff and jurisdictional partners on project refinements

We're only going to get out of this mess if we all work together.

R.T. Rybak, Three-term mayor of Minneapolis



April and May discussions



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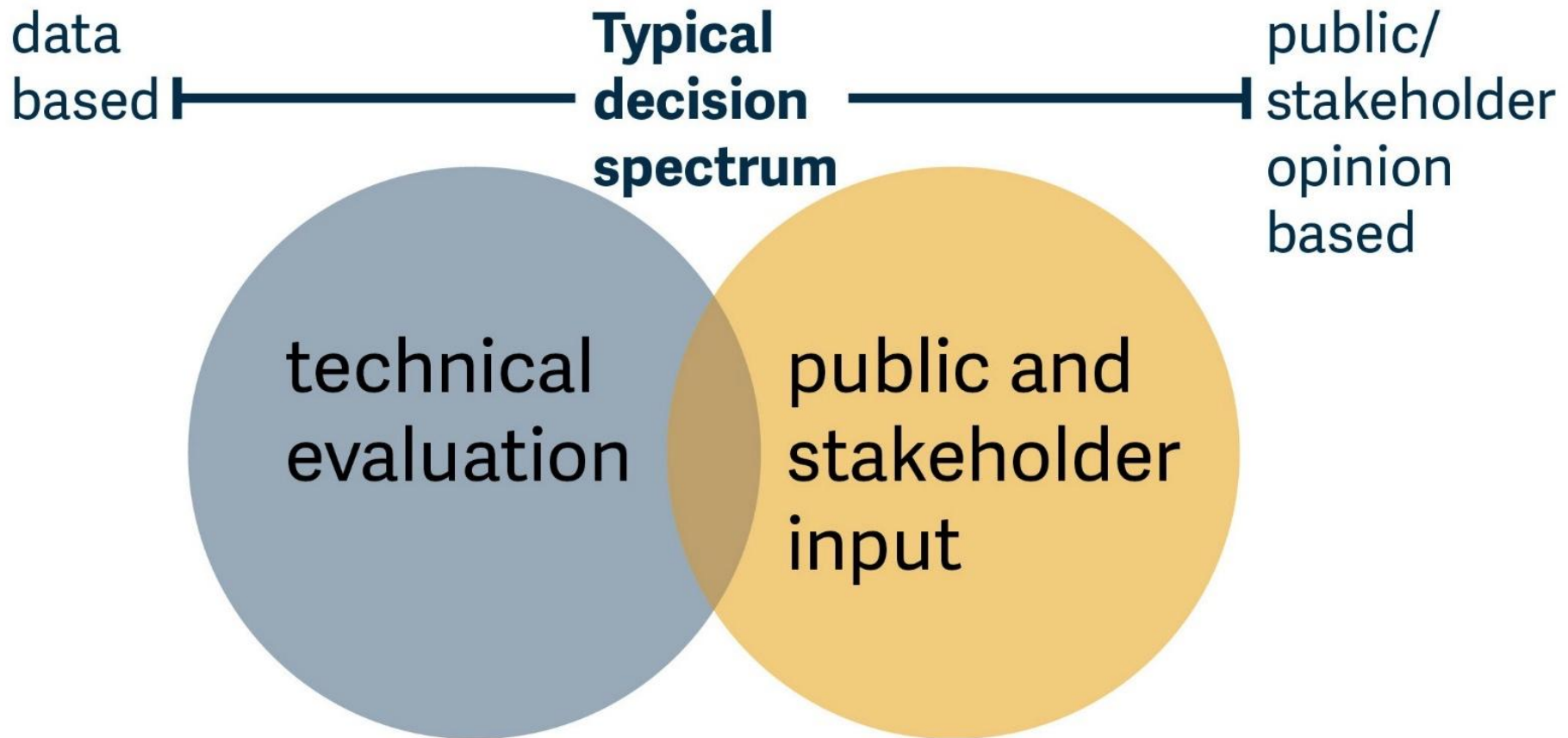
- Draft **safety** strategy
- Draft **freight** strategy
- Draft **transit** strategy
- Draft **emerging technology** strategy
- Draft **RTP** (focus on policy and implementation chapters)



An engagement purpose: better decisions...



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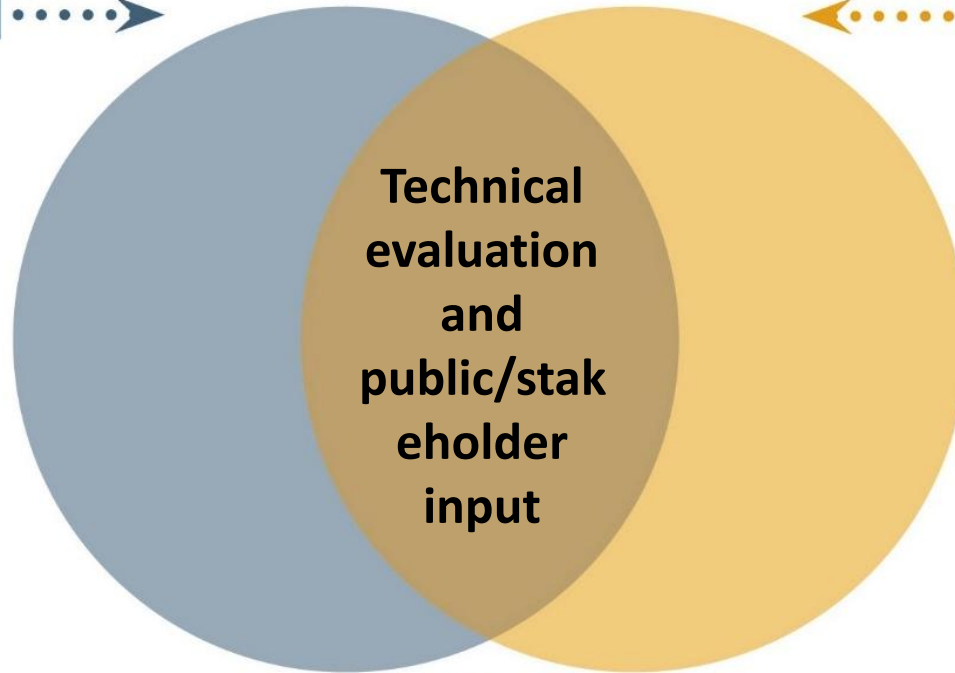


... and, hopefully, easier decisions



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Technical data reflects public values when based on community goals, including those of marginalized communities.



Public and stakeholder input reflects the technical data when information is both accessible and relevant.

Tighter decision spectrum

Spring and summer engagement



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- Currently: What refinements would you like to see?
 - **Online poll** focused on prioritizing outcomes
2018rtp.metroquest.com (through Feb. 17)
 - **Letters and emails** on the draft project list with interactive map
oregonmetro.gov/2018projects (through Feb. 17)
 - **Community Leaders' Forum** (Jan. 19)
 - Metro Council **business outreach** (Jan. to early March)
 - **Final Regional Leadership Forum (March 2)**
- Summer 2018: Public review and comment on draft plan, policies, strategies and project lists
 - **Formal 45-day comment period** (June 29 to Aug. 13)

SAVE THE DATE

March 2 Regional leadership forum

1 Exploring Big Ideas for Our Transportation Future 4/22/16 ✓

2 Building the Future We Want 9/23/16 ✓

3 Connecting Our Priorities to Our Vision 12/2/16 ✓

4 Finalizing Our Shared Plan for the Region 3/2/18



8 AM to noon at the Oregon Convention Center

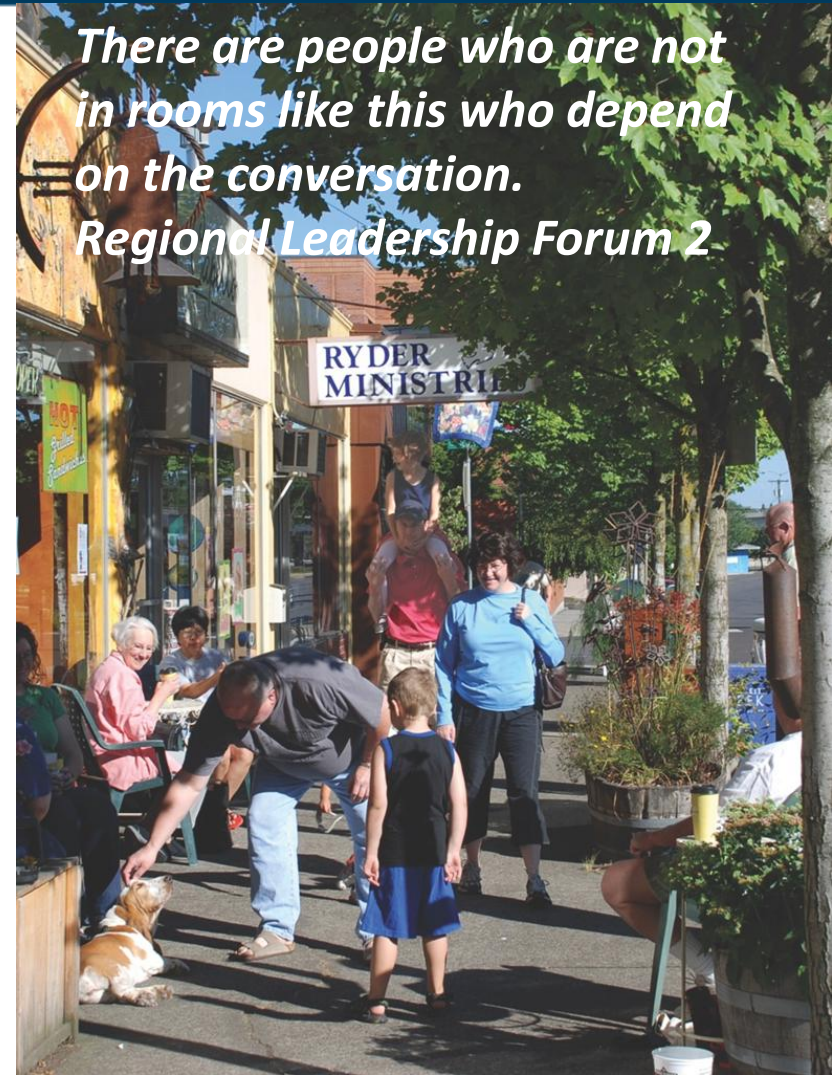
September discussion and October decision



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Finalize recommendations to the Metro Council on adoption of:

- Regional **safety** strategy
- Regional **freight** strategy
- Regional **transit** strategy
- Regional **emerging technology** strategy
- 2018 **Regional Transportation Plan**



*There are people who are not
in rooms like this who depend
on the conversation.*

Regional Leadership Forum 2

Questions and discussion



Metro



oregonmetro.gov/rtp





Public comment opportunity on the 2018 RTP January 15 to February 17, 2018

Your input today will help guide decision-makers as they continue to refine and focus investments before adopting the Regional Transportation Plan in late 2018.

There's a reason our region is such an extraordinary place to call home - decades of careful planning have created inviting neighborhoods, supported a diverse and growing economy, protected our farms, forestland and natural areas, and built a world-class transportation system. Because of our dedication to planning and working together, Metro is seeking your input on the priorities you want to see in the 2018 Regional Transportation Plan.

Your voice is important

The choices we make today about how we live, work and get around will determine the future of the region for generations to come.

You are invited to provide feedback on the plan during the **public comment period from Jan. 15 through Feb. 17, 2018.**

The 2018 Regional Transportation Plan provides the opportunity to update the investments we will make in roads, sidewalks, bikeways, transit and freight routes to support communities today and in the future. This update is an opportunity to define how we will create a safe, reliable, healthy and affordable transportation system for the next 25 years.

Visit 2018rtp.metroquest.com to provide your input and have your voice heard.

SHARE YOUR THOUGHTS January 15 to February 17

Let us know what you want the greater Portland region's transportation system to look like in 2040.

Take the survey at:
2018rtp.metroquest.com

Your input will be shared with regional decision-makers as they work together to provide direction on finalizing the project priorities to be included in the 2018 RTP.

Learn more about the 2018 RTP at oregonmetro.gov/rtp