



600 NE Grand Ave.
Portland, OR 97232-2736

Council meeting agenda

Thursday, May 3, 2018

2:00 PM

Metro Regional Center, Council chamber

PACKET REVISED 5/1

1. Call to Order and Roll Call

2. Public Communication

3. Presentations

3.1 Risk Management Program Follow-up Audit [18-5010](#)

Presenter(s): Brian Evans, Metro Auditor

Attachments: [Risk Management Program Follow-up](#)

4. Consent Agenda

4.1 Consideration of the Council Meeting Minutes for April 19, 2018 **18-5011**

4.2 Resolution No. 18-4877, For the Purpose of Adopting the Fiscal Year 2018-19 Unified Planning Work Program [RES 18-4877](#)

Attachments: [Resolution No. 18-4877](#)
[Exhibit A to Resolution No. 18-4877](#)
[Staff Report](#)

4.3 Resolution No. 18-4888, For the Purpose of Filling a Vacancy on the Metro Central Station Enhancement Committee [RES 18-4888](#)

Attachments: [Resolution No. 18-4888](#)
[Staff Report](#)
[Attachment 1 to Staff Report](#)
[Attachment 2 to Staff Report](#)

- 4.4 Resolution No. 18-4876, 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, Multnomah County, ODOT, and Portland (MA18-07-MAR) [RES 18-4876](#)

Attachments: [Resolution No. 18-4876](#)
[Exhibit A to Resolution No. 18-4876](#)
[Staff Report](#)
[Attachment 1 to Staff Report](#)

- 4.5 Resolution No. 18-4883, 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 Metro, ODOT, and TriMet (AP18-08-APR) [RES 18-4883](#)

Attachments: [Resolution No. 18-4883](#)
[Exhibit A to Resolution No. 18-4883](#)
[Staff Report](#)
[Attachment 1 to Staff Report](#)

5. Resolutions

- 5.1 Resolution No. 18-4891, For the Purpose of Proclaiming May 5, 2018 as a Day of Awareness for Missing and Murdered Native Women and Girls [RES 18-4891](#)

Presenter(s): Clifford Higgins, Metro

Attachments: [Resolution No. 18-4891](#)
[Staff Report](#)

- 5.2 Resolution No. 18-4873, For the Purpose of Approving the FY 2018-19 Budget, Setting Property Tax Levies and Transmitting the Approved Budget to the Multnomah County Tax Supervising and Conservations Commission [RES 18-4873](#)

Attachments: [Resolution No. 18-4873](#)
[Staff Report](#)

- 5.2.1 Public Hearing on Resolution No. 18-4873

- 5.3 Resolution No. 18-4885, For the Purpose of Resolving a Dispute Between the City of Wilsonville and the City of Tualatin Regarding the Concept Plan for the Basalt Creek Planning Area

[RES](#)
[18-488](#)
[5](#)

Presenter(s): Roger Alfred, Metro

Attachments: [Resolution No. 18-4885](#)
[Exhibit A to Resolution No. 18-4885](#)
[Exhibit B to Resolution No. 18-4885](#)

6. Chief Operating Officer Communication

7. Councilor Communication

8. Adjourn

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

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Agenda Item 3.1

Risk Management Program Follow-Up Audit

Presentations

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council
Chamber



Office of the Auditor

Risk Management Program Audit Follow-Up

Zane Potter
Senior Management Auditor

April 2018

SUMMARY

Metro made progress on the two recommendations from the 2013 audit report **Risk Management Program: Improve training and use data to control costs**. It will be important for Metro to fully implement the recommendations because they could result in additional cost savings and increased safety.

BACKGROUND

In an audit released in 2013, our office assessed whether Metro's risk management program was effectively using its data to reduce workers' compensation claims. The audit found that opportunities were being missed to control costs and manage risks. Accordingly, we made two recommendations to increase analytical capabilities and strengthen safety programs.

The risk management program and Metro departments shared responsibility to ensure employees received necessary safety training. The risk management program provided safety consulting services as well as advice on training and record keeping requirements to departments. Each department was responsible for ensuring employees received job specific safety training and used safe work practices.

Since the 2013 audit, Metro changed the organizational structure of the risk management program. The workers' compensation specialist moved from the Finance and Regulatory Services (FRS) department to the Human Resources (HR) department. This position was responsible for the administration and analysis of workers' compensation claims. Workers' compensation pays to treat and rehabilitate workers who are injured on the job. The risk manager and safety specialist were still located in FRS.

RESULTS

Metro made progress on both recommendations. We found that the risk management program strengthened the design of department safety programs, but more work was needed to implement them by departments. We also found that HR regularly reviewed and analyzed workers' compensation claims to identify safety concerns. Based on these reviews and analyses, HR identified department safety concerns and worked with departments to implement safety strategies. Though the risk management program regularly reviewed incident reports, it did not analyze them to identify longer-term trends. Doing so could help Metro identify other risk issues and develop strategies to manage them.

BRIAN EVANS

Metro Auditor

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Exhibit 1 Both recommendations were in process

2013 Audit Recommendations	Status
1. Strengthen the design and management of department safety programs.	In process
2. Regularly review and analyze incident reports and workers' compensation claims data to identify potential safety concerns.	In process
a. Work with departments to identify safety issues using this analysis.	(In process)
b. Once a safety issue is identified, work with departments to develop strategies to improve safety.	(In process)

Source: Metro Auditor's Office analysis

Some efforts made to strengthen safety programs, but work remains

The risk management program helped strengthen the design of department safety programs by creating safety training criteria for departments and creating new policies that could improve safety at departments. However, the extent to which the training was used by departments was unknown by the risk management program. This was because the risk management program did not track all employee training. Also, the use of new policies was mixed. As such, more work was needed to ensure new safety training criteria and policies were used.

Similar to the 2013 audit, we focused most of our follow-up on the four departments with the largest share of workers' compensation claim costs: Portland's; Oregon Zoo; Oregon Convention Center (OCC); and Property & Environmental Services (PES). The following were some of the ways the risk management program helped strengthen the design of department safety programs:

- It developed required training for departments by employee classification. Some classifications had as many as 38 different trainings and ranged from ladder safety to respiratory protection. Training could be provided by the risk management program or on-site supervisors and co-workers.
- It developed an accident/incident policy. The policy was created to report on and analyze accidents, incidents and near miss incidents in an effort to prevent recurrence. The policy sought to identify the primary root causes of accidents/incidents and document the implementation of corrective actions. The policy also stated that investigations were the responsibility of supervisors.
- It developed a Metro-wide forklift policy. Prior to the policy, we were told that there were different policies throughout Metro. This policy was created to provide more consistent guidelines and procedures related to the operation of forklifts across Metro.
- It helped incorporate safety training into the OCC's employee retreat. The purpose was to ensure both new and existing employees received training.

Although the risk management program strengthened the design of department safety programs, more work was needed to strengthen the management of the programs. As highlighted in the previous audit, responsibility for safety training was dispersed across Metro. This meant that ensuring employees received job-related safety training was the responsibility of individual departments, which was also true during the follow-up audit. We were told departments were also responsible for tracking employee training.

The extent to which employees received the required training was unknown. This was because the risk management program did not track all required training and there was not a way for supervisors to report on all training requirements. It will be important for Metro to track employee training to ensure employees received the required training. Doing so would help ensure employees use safe work practices. A way to track training could also help the risk management program identify which departments may need assistance with training.

Additionally, the extent to which departments carried out the accident/incident policy was mixed because the policy was in the early stages of adoption by supervisors. We were told that the risk management program was helping supervisors understand the investigation process outlined in the policy and determining whether supervisors conducted investigations. The policy also stated that tracking corrective actions was required, but this was not being done agency-wide. The risk management program hoped to begin tracking corrective actions once supervisors began conducting investigations with more frequency. Moving forward, Metro will need to ensure investigations are completed and corrective actions are documented to help improve safety and identify any emerging risk areas.

A department that took steps to strengthen the management of its safety program was the Zoo. As highlighted in the 2013 audit, the Zoo had a safety employee, but this person lacked industrial safety experience and had limited participation in implementing changes at the Zoo. Since the audit, a safety manager with safety experience was hired. Additionally, the manager participated in implementing safety changes. For example, the manager created a program to help with participation and awareness of safety training topics.

Review and analysis of workers' compensation claims improved, but more trend analysis of incident reports was needed

The 2013 audit found that two important sources of information weren't being fully used to identify injury trends: incident reports and workers' compensation claims. Incident reports documented injuries to employees and visitors and property damage, and were filled out by department staff. A workers' compensation claim was a one page insurance form that an injured employee filled out before seeking medical treatment.

Since the audit, HR, the Zoo, and the risk management program increased their reviews and analysis of these sources of information, but additional trend analysis of incident reports was needed by the risk management program. As highlighted in the prior audit, incident reports played an important role in managing risk because they can illuminate risk areas that may not be apparent from looking solely at workers' compensation claim data.

Exhibit 2 Recommendation two in process



Source: Metro Auditor's Office analysis

Overall, workers' compensation claim costs per year and the number of claims have gone down since the 2013 audit. However, individual workers' compensation claims can be a large driver of costs for Metro. Expenditures can vary widely from year to year. From FY 2011-12 to FY 2016-17, the total cost of workers' compensation claims was about \$1.8 million and there were 456 claims. The costs of claims varied from year to year and reached a six-year high of about \$470,000 in FY 2011-12 and a low of about \$130,000 in FY 2015-16.

Exhibit 3 Workers' compensation claim costs decreased by about 50 percent since FY 2011-12



Source: Metro Auditor's Office analysis of Human Resources data (adjusted for inflation)

Since the 2013 audit, HR completed more detailed analysis of workers' compensation claims. For example, its analysis showed the top five causes and body parts injured throughout Metro and by departments. The analysis also showed workers' compensation claims as a percentage of each department's employee census. This type of analysis could help identify departments with a high percentage of claims compared to the number of employees who worked in the department. HR offered to meet with departments to discuss its analyses of worker's compensation claims. HR also continued to provide quarterly reports to each department that had a workers' compensation claim for that quarter. Each of these efforts have helped Metro better identify and manage employee safety risks.

The risk management program and HR reviewed incident reports on a weekly basis. Based on the review, the risk management program would determine if additional follow-up was needed with supervisors at the location of the incident. These reviews allowed the risk management program to identify safety issues on a weekly basis, but the approach did not identify incident report trends over time. This type of trend analysis can be an important source of information and lead to preventative action even for incidents that never resulted in a workers' compensation claim. In comparison, the Zoo analyzed incident reports to identify trends over time. Since the risk management program did not analyze trends, it missed an opportunity to identify emerging safety issues and develop strategies to address them.

Analyses can be used to identify safety issues and strategies to manage them

HR used its analysis of workers' compensation claims to identify a type of injury that represented a high percentage of claims and claim costs at Metro. Based on HR's analysis, musculoskeletal (MSD) injuries accounted for almost half of all claim costs at Metro from FY 2013-14 to FY 2015-16. MSD injuries were injuries to muscle, bones, and joints such as neck, shoulders, wrists, backs hip, legs, knees, and feet. These injuries were tied to lifting; carrying; repetitive motion; pushing/pulling; and slips, trips, and falls.

Additionally, the Zoo's analysis of incident reports allowed it to identify a safety issue and develop a strategy to address it. The analysis showed that the number of burns to employees went up. Because of this, the Zoo took corrective actions such as changes in training and changes in personal protective equipment to address the issue.

Efforts made to address some safety issues

After MSD injuries were identified, HR used a training program to address them. The training program was provided through physical demonstrations that helped employees understand how small changes in physical techniques could reduce strains, sprains, and body motion injuries. The training compared photos that showed "stressed" (incorrect/potential injuring) technique with "better" photos that showed proper technique. The training could be tailored to different job types such as office workers, park rangers, and zookeepers.

One example that highlighted the potential impact of the training program was at PES's Hazardous Waste program. HR data showed that the average cost of all workers' compensation claims per year for MSD injuries was about \$61,000 before the training while the average cost after the training was about \$15,000. This was a 76 percent decrease. This highlighted the potential impact of using data to identify and address safety issues which ultimately helped control costs for Metro. It's important to note that one workers' compensation claim can have a large impact on the overall trend.

METHODOLOGY

The purpose of this audit was to determine if recommendations from the 2013 audit were implemented. To accomplish our objective, we interviewed staff involved with risk management across Metro. We focused most of our review and analysis on the four departments with the largest share of claim costs: Portland's, the Zoo, OCC, and PES. We also reviewed and analyzed documents and reports related to risk management and data related to workers' compensation claims.

This audit was included in the FY 2017-18 audit schedule. We conducted this follow-up in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

MANAGEMENT RESPONSE



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

Date: April 6, 2018
To: Brian Evans, Metro Auditor
From: Tim Collier, FRS Director
Mary Rowe, HR Director
Subject: Risk Management Audit Response

Thank you for the opportunity to respond to your follow-up audit of Metro's Risk Management Program. Ensuring the mitigation of risk for Metro and the safety of its employees are among Metro's highest priorities. Your recommendations reinforce the important work already underway and emphasize the importance of continuing to improve the Risk Management Program. In response to your follow up we will continue to work on the following recommendations:

1) Strengthen the safety program

To help further improve the overall safety program. Risk Management will work with HR to track the scheduling and participation in safety training. Once more detailed tracking is developed we will work with departments to better assist them and their training needs.

2) Regularly review and analyze incident reports and workers compensation claims data to identify potential safety concerns

Risk Management and HR will look at developing an incident report and tracking system (for both liability and workers compensation) to allow analysis of incidents agency wide. Once this data is complete and available we will look for common themes and ways to mitigate them.

We believe these steps will improve the overall agency Risk Management Program and continue to ensure the safety of Metro's employees.

Again, I would like to thank Auditor Evans and his staff for the professionalism in which they completed this follow up audit and their continued efforts to ensure that we mitigate risk at Metro.

Agenda Item No. 4.1

**Consideration of the Council Meeting Minutes for
April 19, 2018**

Consent Agenda

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

Agenda Item No. 4.2

Resolution No. 18-4877, For the Purpose of Adopting the
Fiscal Year 2018-19 Unified Planning Work Program

Consent Agenda

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE) RESOLUTION NO. 18-4877
FISCAL YEAR 2018-19 UNIFIED PLANNING) Introduced by Chief Operating Officer
WORK PROGRAM) Martha Bennett with the concurrence of
) Council President Tom Hughes

WHEREAS, the Unified Planning Work Program (UPWP) update as shown in Exhibit A attached hereto, describes all Federally-funded transportation planning activities for the Portland-Vancouver metropolitan area to be conducted in Fiscal Year (FY) 2018-19; and

WHEREAS, the UPWP is developed in consultation with federal and state agencies, local governments, and transit operators; and

WHEREAS, the FY 2018-19 UPWP indicates federal funding sources for transportation planning activities carried out by Metro, Southwest Washington Regional Transportation Council, Clackamas County and its cities, Multnomah County and its cities, Washington County and its cities, TriMet, South Metro Area Regional Transit, the Port of Portland, and the Oregon Department of Transportation; and

WHEREAS, approval of the FY 2018-19 UPWP is required to receive federal transportation planning funds; and

WHEREAS, the FY 2018-19 UPWP is consistent with the proposed Metro Budget submitted to the Metro Council; now therefore

BE IT RESOLVED that:

1. The FY 2018-19 UPWP attached hereto as Exhibit A is hereby adopted.
2. The FY 2018-19 UPWP is consistent with the continuing, cooperative, and comprehensive planning process and has been reviewed through formal consultation with state and federal partners.
3. Metro's Chief Operating Officer is authorized to apply for, accept, and execute grants and agreements specified in the UPWP.
4. Staff shall update the UPWP budget figures, as necessary, to reflect the final Metro budget.
5. Staff shall submit the final UPWP to the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA).

ADOPTED by the Metro Council this 3rd day of May 2018.

Tom Hughes, Council President

Craig Dirksen, Chair of JPACT

Approved as to Form:

Alison R. Kean, Metro Attorney



2018-2019 Unified Planning Work Program

**Transportation Planning in the
Portland/Vancouver Metropolitan Area**

April 2018

Public service

*We are here to serve the public
with the highest level of
integrity.*

Excellence

*We aspire to achieve exceptional
results*

Teamwork

*We engage others in ways that foster
respect and trust.*

Respect

*We encourage and appreciate
diversity in people and ideas.*

Innovation

*We take pride in coming up with
innovative solutions.*

Sustainability

*We are leaders in demonstrating
resource use and protection.*

Metro's values and purpose

We inspire, engage, teach and invite people to preserve and enhance the quality of life and the environment for current and future generations.

Metro respects civil rights

Metro hereby gives public notice that it is the policy of the Metro Council to assure full compliance with Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 on Environmental Justice and related statutes and regulations in all programs and activities. Title VI requires that no person in the United States of America shall, on the grounds of race, color, sex, or national origin, be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which Metro receives federal financial assistance. Any person who believes they have been aggrieved by an unlawful discriminatory practice under Title VI has a right to file a formal complaint with Metro. Any such complaint must be in writing and filed with Metro's Title VI Coordinator within one hundred eighty (180) days following the date of the alleged discriminatory occurrence. For more information, or to obtain a Title VI Discrimination Complaint Form, see the web site at www.oregonmetro.gov or call (503) 797-1536.

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: <http://www.oregonmetro.gov/unified-planning-work-program>

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Portland Metropolitan Area Unified Planning Work Program (UPWP) Overview

INTRODUCTION:

The Unified Planning Work Program (UPWP) is developed annually and documents metropolitan transportation planning activities performed with federal transportation funds. The UPWP is developed by Metropolitan Planning Organizations (MPOs) in cooperation with Federal and State agencies, local governments and transit operators.

This UPWP documents the metropolitan planning requirements, planning priorities facing the Portland metropolitan area and transportation planning activities and related tasks to be accomplished during FY 2018-2019 (from July 1, 2018 to June 30, 2019).

Metro is the metropolitan planning organization (MPO) designated by Congress and the State of Oregon, for the Oregon portion of the Portland/Vancouver urbanized area, covering 24 cities and three counties. It is Metro's responsibility to meet the requirements of The Fixing America's Surface Transportation FAST Act, the Oregon Transportation Planning Rule (which implements Statewide Planning Goal 12), and the Metro Charter for this MPO area. In combination, these requirements call for development of a multi-modal transportation system plan that is integrated with the region's land use plans, and meets Federal and state planning requirements.

The UPWP is developed by Metro, as the MPO for the Portland metropolitan area. It is a federally-required document that serves as a tool for coordinating federally-funded transportation planning activities to be conducted over the course of each fiscal year, beginning on July 1. Included in the UPWP are detailed descriptions of the transportation planning projects and programs, listings of draft activities for each project, and a summary of the amount and source of state and federal funds to be used for planning activities. Estimated costs for project staff (expressed in full-time equivalent, or FTE) include budget salary and benefits as well as overhead costs per FTE for project administrative and technical support.

The UPWP is organized into three sections: the UPWP Overview, a listing of planning activities by category, and other planning related information including the UPWP for the Southwest Washington Regional Transportation Council.

Planning activities for the Portland metropolitan area are listed in the UPWP by categories to reflect how the activities are administered through planning agreements and the Metropolitan Transportation Improvement Program (MTIP). These categories include: General MPO planning for planning activities that occur on continuous cycles and are administered in the annual Metro-ODOT plan funding agreement, MPO planning projects that are discrete activities with an end date and may have an individual agreement between ODOT and Metro and unique entry in the TIP, other regional planning projects led by agencies other than Metro, and project development planning activities to increase project readiness and prepare project concepts to begin the NEPA and Preliminary Engineering phase of development. Organizing planning activities in this manner facilitates transparent administration of the planning activities by the agreements that provide for their scope and budget and by the MTIP which programs the funding for these activities and ensures funding is constrained (limited) to funds actually available.

The UPWP is developed by Metro with input from local governments, TriMet, SMART, ODOT, FHWA and FTA. Additionally, Metro must annually undergo a process known as self-certification to demonstrate that the Portland metropolitan region's planning process is being conducted in accordance with all applicable federal transportation planning requirements. Self-certification is conducted in conjunction with annual adoption of the UPWP.

This Unified Planning Work Program (UPWP) includes the transportation planning activities of Metro and other area governments using Federal funds for transportation planning activities for the fiscal year of July 1, 2018 through June 30, 2019. During the consultation, public review and adoption process for the 2018-19 UPWP, draft versions of the document were made available to the public through Metro's website, and distributed to Metro's advisory committees and the Metro Council.

When developing the annual UPWP, Metro follows protocols established by ODOT in cooperation with USDOT in 2016. These protocols govern the general timeline for initiating the UPWP process, consultation with state and federal agencies and adoption by JPACT and the Metro Council.

FEDERAL REQUIREMENTS FOR TRANSPORTATION PLANNING

The current federal transportation ACT, Fixing America's Surface Transportation (FAST) Act provides direction for regional transportation planning activities. The FAST Act was signed into law by President Obama on December 4, 2015. It sets the policy and programmatic framework for transportation investments. Fast Act stabilizes federal funding to state and metropolitan regions for transportation planning and project improvements and funding levels for the federal aid transportation program, and among key initiatives adds new competitive grants which promote investments in the nation's strategic freight corridors. In addition, FAST Act retains the multi-modal emphasis of the federal program by ensuring funding of transit programs as well as the Transportation Alternatives Program. FAST Act builds in the program structure and reforms of the prior federal Transportation Act, MAP-21, which created streamlined and performance-based surface transportation program.

Regulations implementing FAST Act require state DOTs and MPOs to establish performance measures and set performance targets for each of the seven national goal areas to provide a means to ensure efficient investment of federal transportation funds, increase accountability and transparency, and improve investment decision-making. The national goal areas are:

- Safety
- Infrastructure condition
- Congestion reduction
- System reliability
- Freight movement and economic vitality
- Environmental sustainability
- Reduce project delivery delays

A. Planning Emphasis Areas (PEAs)

The metropolitan transportation planning process must also incorporate Federal Highway Administration/Federal Transit Administration planning emphasis areas (PEAs). (Accessed

at www.fhwa.dot.gov/planning/processes/metropolitan/mpo/fy_2015/index.cfm on February 20, 2015) For FY 2018-2019, these include:

- **Models of Regional Planning Cooperation:** Promote cooperation and coordination across MPO boundaries and across State boundaries to ensure a regional approach to transportation planning. Cooperation could occur through the metropolitan planning agreements that identify how the planning process and planning products will be coordinated, through the development of joint planning products, and/or by other locally determined means. Coordination includes the linkages between the transportation plans and programs, corridor studies, projects, data, and system performance measures and targets across MPO and State boundaries. It also includes collaboration between State DOT(s), MPOs, and operators of public transportation on activities such as: data collection, data storage and analysis, analytical tools, target setting, and system performance reporting in support of performance based planning.
- **Access to Essential Services:** As part of the transportation planning process, identify social determination of transportation connectivity gaps in access to essential services. Essential services include housing, employment, health care, schools/education, and recreation. This emphasis area could include identification of performance measures and analytical methods to measure the transportation system's connectivity to essential services and the use of this information to identify gaps in transportation system connectivity that preclude access of the public, including traditionally underserved populations, to essential services. It could also involve the identification of solutions to address those gaps.
- **MAP-21 and FAST Act Implementation: Transition to Performance Based Planning and Programming to be used in Transportation Decision-making:** The development and implementation of a performance management approach to metropolitan transportation planning and programming includes the development and use of transportation performance measures, target setting, performance reporting, and selection of transportation investments that support the achievement of performance targets. These components will ensure the achievement of transportation system performance outcomes.

B. Public Involvement

Federal regulations place significant emphasis on broadening participation in transportation planning to include key stakeholders who have not traditionally been involved in the planning process, including the business community, members of the public, community groups, and other governmental agencies. Effective public involvement will result in meaningful opportunities for public participation in the planning process.

C. Regional Transportation Plan

The long-range transportation plan must include the following:

- Identification of transportation facilities (including major roadways, transit, bike, pedestrian

and intermodal facilities and intermodal connectors) that function as an integrated metropolitan transportation system.

- A discussion of types of potential environmental mitigation activities and potential areas to carry out these activities.
- A financial plan that demonstrates how the adopted transportation plan can be implemented.
- Operational and management strategies to improve the performance of existing transportation facilities to manage vehicular congestion and maximize the safety and mobility of people and goods.
- Capital investment and other strategies to preserve the existing and projected future metropolitan transportation infrastructure and provide for multimodal capacity increases based on regional priorities and needs.
- Proposed transportation and transit enhancement activities.
- Recognition of the 2016 Coordinated Transportation Plan for Seniors and People with Disabilities
- Addressing required federal planning factors: improving safety, supporting economic vitality, increasing security, increasing accessibility and mobility, protecting the environment and promoting consistency between transportation investments and state and local growth plans, enhancing connectivity for people and goods movement, promoting efficient system management and operations, and emphasizing preservation of existing transportation infrastructure.

D. Metropolitan Transportation Improvement Program (MTIP)

The short-range metropolitan TIP must include the following:

- A priority list of proposed federally supported projects and strategies to be carried out within the MTIP period.
- A financial plan that demonstrates how the MTIP can be implemented.
- Descriptions of each project in the MTIP.

E. Transportation Management Area (TMA)

Metropolitan areas designated TMAs (urbanized areas with a population of over 200,000) such as the Metro must also address the following requirements:

- Transportation plans must be based on a continuing and comprehensive transportation planning process carried out by the MPO in cooperation with the State and public transportation operators.
- A Congestion Management Process (CMP) must be developed and implemented that provides for effective management and operation, based on a cooperatively developed and implemented metropolitan-wide strategy of new and existing transportation facilities, through use of travel demand reduction and operational management strategies.
- A federal certification of the metropolitan planning process must be conducted at least every 4 years. At least every 4 years, the MPO must also self-certify concurrent with submittal of an adopted TIP.

F. Air Quality Conformity Process

Areas in attainment, but with maintenance plan requirements must demonstrate the region will continue to meet federal standards for air quality and with the transportation provisions of the state's air quality plan (the State Implementation Plan or SIP). The Portland metropolitan region will continue to demonstrate its transportation plans and programs are in conformance until October 2017, when the Portland metropolitan region's maintenance plan will be completed. After October 2017, the region will no longer have maintenance plan requirements and will be in attainment status and therefore will no longer be subject to demonstrating transportation plans and programs are in conformance, but will continue to be subject to meeting federal air quality standard and provisions within the State's air quality plan.

STATUS OF METRO'S FEDERALLY REQUIRED PLANNING DOCUMENTS

Plan Name	Last Update	Next Update
Unified Planning Work Program (UPWP)	Adopted in May 2017	Scheduled for adoption in May 2018
Regional Transportation Plan (RTP)	Adopted June 2014	Scheduled for adoption in December 2018
Metropolitan Transportation Improvement Program (MTIP)	Adopted August 2017	Scheduled for adoption in July, 2020
Annual Listing of Obligated Projects Report	Completed at the end of each calendar year – 2017 is still in progress (as of 1/4/18)	Scheduled for December 31, 2018
Title VI/ Environmental Justice Plan	Approved July 2017	Scheduled for July 2020
Public Participation Plan	Adopted November 2017	March 2018
ADA Self-Evaluation & Facilities Update Plan		Underway – scheduled for completion in July 2018

II. METRO OVERVIEW

Metro was established in 1979 as the MPO for the Portland metropolitan area. Under the requirements of FAST Act, Metro serves as the regional forum for cooperative transportation decision-making as the federally designated Metropolitan Planning Organization (MPO) for Oregon portion of the Portland-Vancouver urbanized area.

Federal and state law requires several metropolitan planning boundaries be defined in the region for different purposes. The multiple boundaries for which Metro has a transportation and growth management planning role are: MPO Planning Area Boundary, Urban Growth Boundary (UGB), Urbanized Area Boundary (UAB), Metropolitan Planning Area Boundary (MPA), and Air Quality maintenance Area Boundary (AQMA). A map displaying these boundaries can be found on page xiii.

First, Metro's jurisdictional boundary encompasses the urban portions of Multnomah, Washington and Clackamas counties.

Second, under Oregon law, each city or metropolitan area in the state has an urban growth boundary that separates urban land from rural land. Metro is responsible for managing the Portland metropolitan region's urban growth boundary.

Third, the Urbanized Area Boundary (UAB) is defined to delineate areas that are urban in nature distinct from those that are largely rural in nature. The Portland-Vancouver metropolitan region is somewhat unique in that it is a single urbanized area that is located in two states and served by two MPOs. The federal UAB for the Oregon-portion of the Portland-Vancouver metropolitan region is distinct from the Metro Urban Growth Boundary (UGB).

Fourth, MPO's are required to establish a Metropolitan Planning Area (MPA) Boundary, which marks the geographic area to be covered by MPO transportation planning activities, including development of the UPWP, updates to the Regional Transportation Plan (RTP), Metropolitan Transportation Improvement Program (MTIP), and allocation of federal transportation funding through the Regional Flexible Fund Allocation (RFFA) process. At a minimum, the MPA boundary must include the urbanized area, areas expected to be urbanized within the next twenty years and areas within the Air Quality Maintenance Area Boundary (AQMA) – a fifth boundary.

The federally-designated AQMA boundary includes former non-attainment areas in the metropolitan region that are subject to federal air quality regulations. As a former carbon monoxide and ozone non-attainment region, the Portland metropolitan region had been subject to a number of transportation conformity requirements. As of October 2017, the region has completed and is not longer required to perform transportation conformity requirements for carbon monoxide. Transportation conformity requirements related to ozone were lifted in the late 2000's due to the revocation of the 1-hour ozone standard, which was the standard the region had been in non-attainment.

REGIONAL TRANSPORTATION DECISION-MAKING PROCESS

Metro is governed by an elected regional Council, in accordance with a voter-approved charter. The Metro Council is comprised of representatives from six districts and a Council President elected region-wide. The Chief Operating Officer is appointed by the Metro Council and leads the day-to-day operations of Metro. Metro uses a decision-making structure that provides state, regional and local governments the opportunity to participate in the transportation and land use decisions of the organization. Two key committees are the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Policy Advisory Committee (MPAC). These committees are comprised of elected and appointed officials and receive technical advice from the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT)

JPACT is a 17-member policy committee chaired by a Metro Councilor and includes two additional Metro Councilors, seven locally elected officials representing cities and counties, and appointed officials from the Oregon Department of Transportation (ODOT), TriMet, the Port of Portland, and the Department of Environmental Quality (DEQ). The State of Washington is also represented with

three seats that are traditionally filled by two locally elected officials and an appointed official from the Washington Department of Transportation, (WSDOT). All transportation-related actions (including Federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can ratify the JPACT recommendations or refer them back to JPACT with a specific concern for reconsideration.

Final approval of each action requires the concurrence of both JPACT and the Metro Council. JPACT is primarily involved in periodic updates to the Regional Transportation Plan (RTP), Metropolitan Transportation Improvement Program (MTIP), and review of ongoing studies and financial issues affecting transportation planning in the region.

METRO POLICY ADVISORY COMMITTEE (MPAC)

MPAC was established by Metro Charter to provide a vehicle for local government involvement in Metro’s growth management planning activities. It includes eleven locally-elected officials, three appointed officials representing special districts, TriMet, a representative of school districts, three citizens, two Metro Councilors (with non-voting status), two officials from Clark County, Washington and an appointed official from the State of Oregon (with non-voting status). Under Metro Charter, this committee has responsibility for recommending to the Metro Council adoption of, or amendment to, any element of the Charter-required Regional Framework Plan.

The Regional Framework Plan was first adopted in December 1997 and addresses the following topics:

- Transportation
- Land Use (including the Metro Urban Growth Boundary (UGB))
- Open Space and Parks
- Water Supply and Watershed Management
- Natural Hazards
- Coordination with Clark County, Washington
- Management and Implementation

In accordance with these requirements, the transportation plan is developed to meet not only FAST Act, but also the Oregon Transportation Planning Rule and Metro Charter requirements, with input from both MPAC and JPACT. This ensures proper integration of transportation with land use and environmental concerns.

TRANSPORTATION POLICY ALTERNATIVES COMMITTEE (TPAC)

TPAC is comprised of technical staff from the same jurisdictions as JPACT, plus a representative from the Southwest Washington Regional Transportation Council, and six community members. In addition, the Federal Highway Administration and C-TRAN have each appointed an associate non-voting member to the committee. TPAC makes recommendations to JPACT.

METRO TECHNICAL ADVISORY COMMITTEE (MTAC)

MTAC is comprised of technical staff from the same jurisdictions as MPAC plus community and business members representing different interests, including public utilities, school districts, economic development, parks providers, housing affordability, environmental protection, urban design and development. MTAC makes recommendations to MPAC on land use related matters.

PLANNING PRIORITIES FACING THE PORTLAND REGION

FAST Act, the Clean Air Act Amendments of 1990 (CAAA), the Oregon Transportation Planning Rule, the Oregon Transportation Plan and modal/topic plans, the Metro Charter, the Regional 2040 Growth Concept and Regional Framework Plan together have created a comprehensive policy direction for the region to update land use and transportation plans on an integrated basis and to define, adopt, and implement a multi-modal transportation system.

These Federal, state and regional policy directives also emphasize development of a multi-modal transportation system. Major efforts in this area include:

- Update of the Regional Transportation Plan (RTP);
- Update to the Metropolitan Transportation Improvement Program (MTIP)
- Implementation of projects selected through the STIP/MTIP updates; and
- Completing multi-modal refinement studies in the Southwest Corridor Plan and the Powell/Division Transit Corridor Plan.

These policy directives point toward efforts to reduce vehicle travel and vehicle emissions, in particular:

- The Oregon state goal to reduce vehicle miles traveled (VMT) per capita;
- Targeting transportation investments to leverage the mixed-use, land use areas identified within the Regional 2040 Growth Concept;
- Adopted maintenance plans for ozone and carbon monoxide with establishment of emissions budgets to ensure future air-quality violations do not develop;
- Adoption of targets for non-single occupant vehicle travel in RTP and local plans;
- An updated five-year strategic plan for the Regional Travel Options Program; and
- Continued implementation of the five-year Transportation and System Management and Operations (TSMO) strategic plan for the Regional Mobility Program.

The current status of these activities is that many of the transportation planning programs – including the Regional Transportation Plan, Freight Plan, TSMO Plan, Regional Transit Plan and supporting updates to our Public Involvement Policy and Title VI Plan – are being updated. Implementation of these updated plans, policies and public involvement procedures will continue in FY 2018-19 and is reflected in the respective work programs for these ongoing projects.

Metro's regional priorities not only meet the most critical planning needs identified within our region, but also closely match federal planning priorities, as well:

- Our update to the Regional Freight Strategy will address rapidly changing port conditions in our region, including a gap in container cargo service, while also addressing FAST Act goals for implementing a national freight system.
- Our update to the Regional Safety Strategy responds to strong public demand for immediate action to improve multimodal safety on our major streets while also helping establish measures to help track safety to meet state and federal performance monitoring.
- Our Regional Transit Strategy will not only expand on our vision for strong transit system to help shape growth in our region, but will also help ensure that we continue to meet state and federal clean air requirements.

- The 2018 RTP update will continue to refine our outcomes-based policy framework that not only allows our decision makers that base regulatory and investment decisions on desired outcomes, but will also allow us to meet new federal requirements for performance base planning.

A Climate Smart Strategy was adopted in December 2014, and is currently being implemented through the 2018 RTP. The Congestion Management Process (CMP) was adopted as part of 2014 RTP in July 2014 (see Chapter 5). Many of the elements of the CMP are included as part of the Transportation System Management and Operations (TSMO) program, consisting of both the Regional Mobility and Regional Travel Options work programs. Metro staff revised the Regional Mobility Atlas as part of the 2014 RTP update.

Metro's annual development of the UPWP and self-certification of compliance with federal transportation planning regulations are part of the core MPO function. The core MPO functions are contained within the MPO Management and Services section of the work program. Other MPO activities that fall under this work program are air quality conformity analysis, quarterly reports for FHWA, FTA and other funding agencies, management of Metro's advisory committees, management of grants, contracts and agreements and development of the Metro budget. Quadrennial certification review took place in February 2017 and is covered under this work program.

UPWP OVERVIEW

Resolution place holder

Page 2 Resolution

GLOSSARY OF RESOURCE FUNDING TYPES

- PL – Federal FHWA transportation planning funds allocated to Metropolitan Planning Organizations (MPO’s).
- STBG– Federal Surface Transportation Program transportation funds allocated to urban areas with populations larger than 200,000. Part of Metro’s regional flexible fund allocation (RFFA) to Metro Planning, or to specific projects as noted.
- 5303 – Federal FTA transportation planning funds allocated to MPOs and transit agencies.
- ODOT Support – Funding from ODOT to support regional transportation planning activities (currently \$225,000 per year).
- TriMet Support - Funding from TriMet to support regional transportation planning activities (currently \$225,000 per year).
- Metro – Local match support from Metro general fund or solid waste revenues.
- Other – Anticipated revenues pending negotiations with partner agencies.

UPWP AMENDMENT PROCESS

The UPWP is a living document, and must be amended periodically to reflect significant changes in project scope or budget to ensure continued, effective coordination among our federally funded planning activities. This section describes the management process for amending the UPWP, identifying project changes that require an amendment to the UPWP, and which of these amendments can be accomplished as administrative actions by staff versus legislative action by JPACT and the Metro Council.

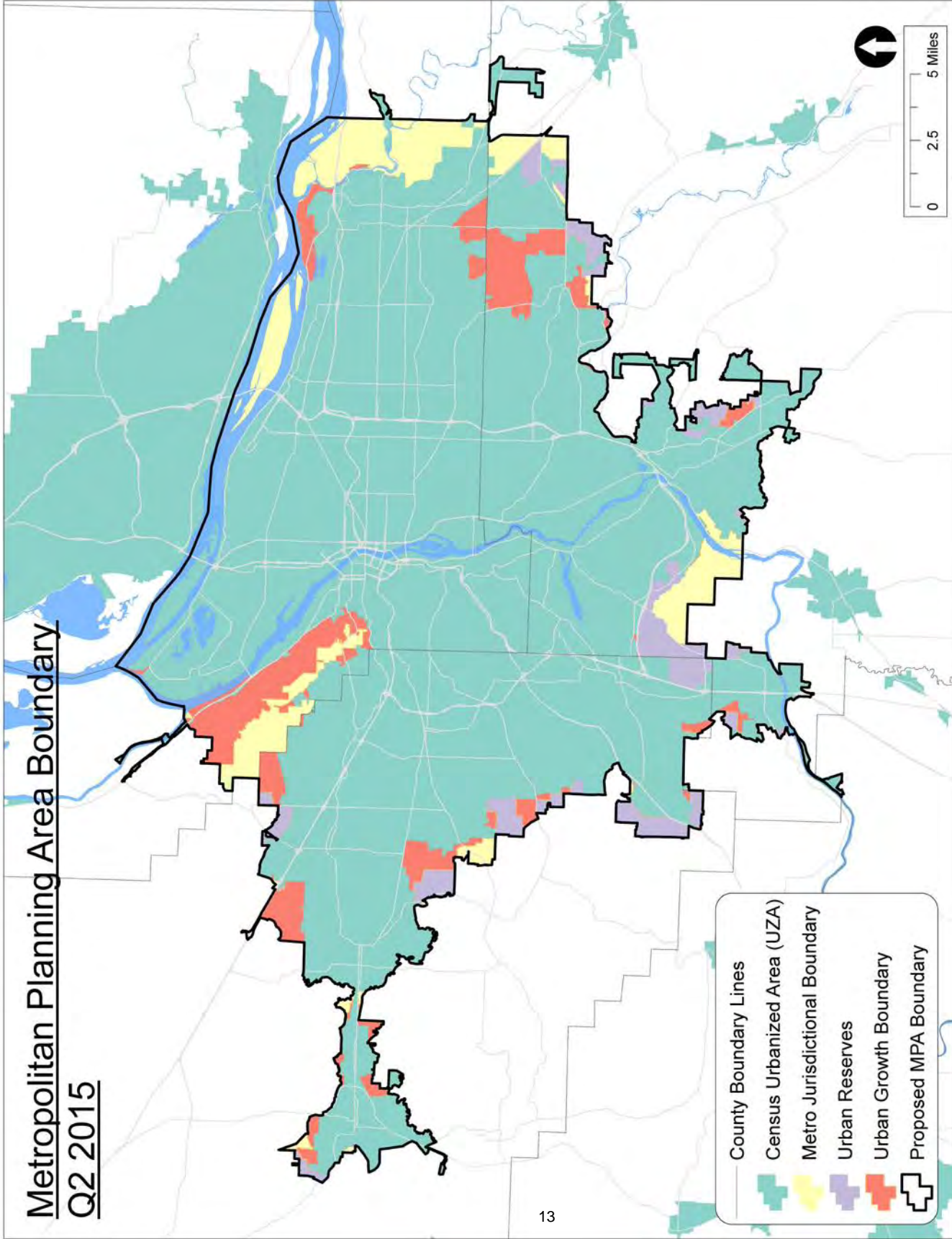
Legislative amendments to the UPWP are required when any of the following occur:

- A new planning study or project is identified.
- There is either a \$200,000 or 20 percent change, whichever is greater, in the total cost of an existing UPWP project. This does not cover carryover funds for a project/program extending multiple fiscal years that is determined upon fiscal year closeout.

Administrative changes to the UPWP can occur for the following:

- Changes to TOTAL UPWP project costs that do not exceed the thresholds for formal amendments above.
- Revisions to a UPWP narrative’s scope of work, including objectives, tangible products expected in fiscal year, and methodology.
- Addition of carryover funds from previous fiscal year once closeout has been completed to projects/programs that extend into multiple fiscal years.

Metropolitan Planning Area Boundary Q2 2015



Description The Metropolitan Planning Area (MPA) boundary is a federal requirement for the metropolitan planning process. The boundary is established by the governor and individual Metropolitan Planning Organizations within the state, in accordance with federal metropolitan planning regulations. The MPA boundary must encompass the existing urbanized area and the contiguous areas expected to be urbanized within a 20-year forecast period. Other factors may also be considered to bring adjacent territory into the MPA boundary. The boundary may be expanded to encompass the entire metropolitan statistical area or combined as defined by the federal Office of Management and Budget.

Function The Metropolitan Planning Area boundary establishes the area in which the Metropolitan Planning Organization conducts federally mandated transportation planning work, including: a long-range Regional Transportation Improvement Program, the Metropolitan Transportation Improvement Program for capital improvements identified for a four-year construction period, a Unified Planning Work Program, a congestion management process, and conformity to the state implementation plan for air quality for transportation related emissions.

Transportation Planning

Staff contact: Tom Kloster, Tom.Kloster@oregonmetro.gov

Description:

As the designated Metropolitan Planning Organization (MPO) for the Portland metropolitan region, Metro is responsible for meeting all federal planning mandates for MPOs. These include major mandates described elsewhere in this Unified Planning Work Program (UPWP), such as the Regional Transportation Plan (RTP) and Metropolitan Transportation Improvement Plan (MTIP) that follow this section. In addition to these major mandates, Metro also provides a series of ongoing transportation planning services and programs that support the major regional programs and other transportation planning in the region, including:

- Periodic amendments to the RTP that occur outside the regular RTP update cycles
- Periodic updates to the regional growth forecast
- Periodic updates to the regional revenue forecasts
- General support for regional safety planning
- General support for regional corridor planning
- Ongoing transportation model updates and enhancements
- Policy support for regional Mobility and CMP programs

Metro also brings supplementary federal funds and regional funds to this program in order to provide general planning support to the following regional and state-oriented transportation planning efforts:

- Policy and technical planning support for the Metro Council
- Administration of the regional framework & transportation functional plans
- Ongoing compliance with State greenhouse gas emission targets
- Periodic urban growth report support
- Ongoing support for Metro's local partnerships program
- Support for local Transportation System Planning
- Ongoing support for Metro's Transportation Snapshots
- Periodic support for other programs in the Planning & Development Department on transportation issues
- Participation in statewide transportation planning and rulemaking activities

Objectives:

Continued provision of regional transportation planning services and programs that support the major regional programs and other transportation planning in the region, as described above (ongoing)

Previous Work:

- Supported the Powell-Division Transit & Development Project adoption and amendment to the RTP.
- Participated in federal rulemaking process.
- Supported federal research projects on MPO operations and administration.
- Worked with ODOT and local partners to updates to the regional revenue forecast for

2040.

- Provided periodic safety and bicycle policy planning support for the Powell-Division and Southwest Corridor projects.
- Provided policy and technical support for freight enhancements to the regional travel demand model.
- Secured grant funding for the Regional Transit Strategy.
- Secured grant funding for the Designing Livable Streets project.

Metro also brings supplementary federal funds and regional funds to this program in order to provide general planning support to the following regional and state-oriented transportation planning efforts:

- Provided periodic transportation planning policy support for the Metro Council
- Produced annual transportation functional plan compliance report to the Metro Council
- Participated in rulemaking for updated greenhouse gas emission targets
- Supported the 2015 urban growth report
- Provided ongoing support for Metro's local partnerships program
- Provided support for local Transportation System Planning efforts
- Completed Transportation Snapshots in 2015 and 2016

Work Completed in 2017-18 included:

- Supported the Powell-Division Transit & Development Project adoption and amendment to the RTP.
- Drafted a major update to the Regional Freight Strategy as part of the 2018 RTP Update.
- Drafted a Regional Transit Strategy as part of the 2018 RTP Update.
- Drafted a major update to the Regional Safety Strategy as part of the 2018 RTP Update.
- Initiated a major update to the Designing Livable Streets program of best practice tools.
- Participated in federal rulemaking process with comments on the draft performance measure and MPO planning rules.
- Participated in state rulemaking amendments to the Oregon Transportation Planning Rule.
- Supported federal research projects on MPOs, including detailed surveys and phone interviews on Metro's operations and administration.
- Coordination with ODOT and local city and county partners to develop a regional revenue forecast for 2040.
- Provided policy and technical support for freight enhancements to the regional travel demand model funded through a national grant.
- Produced 2016 transportation functional plan compliance report to the Metro Council
- Provided ongoing support for Metro's local partnerships program, including monthly training meetings and individual support for staff liaisons.
- Provided support for local Transportation System Planning efforts in several local jurisdictions.

Methodology:

General transportation support is organized around two thematic teams within the planning program. A team of modal and topic experts provides expertise and support on freight, bicycle, pedestrian, motor vehicle and transit planning, and topic experts provide support on climate change, equity, safety, street design, resilience, transportation funding, state and federal regulation and performance

monitoring. These staff experts are generally available on short notice for periodic strategic consultation and support on Metro's major projects and programs.

A second cross-departmental team consists of local government liaisons, each with 1-2 local jurisdictions to support on land use and transportation planning topics. This team provides ongoing support, and meets monthly to stay abreast of key planning issues and trends, legal and regulatory issues affecting local planning and to share experiences and solutions in providing local planning support.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Continued provision of regional transportation planning services and programs, as needed, to support the major regional programs and other transportation planning in the region. In addition to ongoing support activities, major tangible products in 2018-19 include:

- Complete a final Regional Freight Strategy as part of the 2018 RTP adoption. (2nd Quarter)
- Complete a final Regional Transit Strategy. (2nd Quarter)
- Complete a final Regional Safety Strategy. (2nd Quarter)
- Complete the update to the Designing Livable Streets tools. (2nd Quarter)
- Support adoption of the Southwest Corridor LPA. (2nd Quarter)
- Complete an RTP Amendment for TriMet's Red Line Expansion Project. (2nd Quarter)
- Participate in the rulemaking advisory committee and formally comment on the Oregon Transportation Planning Rule amendments. (2nd Quarter)

Entity/ies Responsible for Activity:

- Metro – Product Owner/Lead Agency

Other Stakeholders:

- Local Cities and Counties
- Metro Council
- Metro Parks & Nature Department
- Metro Research Center
- Oregon Department of Transportation
- Oregon Department of Land Conservation and Development
- Oregon Department of Environmental Quality
- U.S. Department of Transportation

Schedule for Completing Activities:

Please refer to schedule information provided in the Major Project Deliverables/Milestones section.

Funding History:

No funding history (new program). This is the first year this narrative has been separated out from the RTP update narrative.

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 721,566	PL	\$ 353,372
Interfund Transfers	\$ 351,950	STBG	\$ 341,476
Materials and Services	\$ 16,600	5303	\$ 72,859
		Metro	\$ 331,246
TOTAL \$ 1,090,116		TOTAL \$ 1,090,116	

Full-Time Equivalent Staffing

Regular Full-Time FTE	5.782
TOTAL	5.782

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 698,349	PL	\$ 665,787
Interfund Transfers	\$ 381,729	STBG	\$ 397,745
Materials and Services	\$ 66,600	5303	\$ 33,759
		Metro	\$ 49,388
TOTAL \$ 1,146,678		TOTAL \$ 1,146,678	

Full-Time Equivalent Staffing

Regular Full-Time FTE	5.334
TOTAL	5.334

Regional Transportation Plan Update (2018)

Staff contact: Kim Ellis, kim.ellis@oregonmetro.gov

Description of the Project:

The Regional Transportation Plan (RTP) guides local and regional transportation planning, funding and implementation activities in the Portland metropolitan region for all forms of travel – motor vehicle, transit, biking and walking – and the movement of goods and freight. In addition to meeting federal and state requirements, the plan also addresses a broad range of regional planning objectives, including implementing the 2014 Climate Smart Strategy and the 2040 Growth Concept – the region’s long-range growth management strategy – to create healthy, equitable communities and a strong economy.

Central to the RTP is an overall emphasis on outcomes, system completeness, and measurable performance targets to track progress toward the plan’s goals. The plan seeks to create an integrated regional transportation system that is safe, healthy, accessible, reliable, equitable, affordable and efficient for all users and supports how and where the region and communities have planned to grow. The plan identifies current and future regional transportation needs, near- and long-term investment priorities and actions to address those needs. The plan also accounts for local, regional, state and federal transportation funds the region expects to have available to build the region’s investment priorities.

The RTP is maintained and updated regularly to ensure continued compliance with State and Federal requirements and to address growth and changes in land use, demographic, financial, travel, technology and economic trends. Updates to the RTP are governed by a number of federal requirements that must be met in order for the plan to be certified by the U.S. Department of Transportation and for the region to remain eligible to receive federal transportation dollars. Updates to the RTP are also governed by a number of state requirements that must be met in order for the plan to be approved by the Land Conservation and Development Commission. The RTP is a Regional Transportation System Plan (TSP) under state law. TSPs for cities and counties located within an MPO area must be consistent with both the statewide Transportation Planning Rule and the RTP. Regional functional plans direct local government implementation of the RTP.

Objectives of the Project:

- Carry out work activities to maintain, implement, and update the RTP in cooperation and coordination with federal, state and local agencies and other transportation providers and comply with state and federal requirements, including the Oregon Transportation Planning Rule, and FAST Act. (ONGOING)
- Provide inclusive and meaningful opportunities for interested members of the public, transportation providers, historically marginalized communities (e.g., communities of color, low-income persons, and persons with limited ability to speak English, persons living with disabilities, youth and older adults) and other affected stakeholders to be involved, providing clear and concise information, timely public notices of opportunities to comment, and full public access to key decisions. (ONGOING)
- Continue transition to performance-based planning to identify innovative, cost-effective solutions to social, economic and environmental challenges facing the region and better

connect plan outcomes to the values and experiences of people living and working in the region. (ONGOING)

- Implement the 2014 Climate Smart Strategy and 2014 Regional Active Transportation Plan, develop and adopt a Regional Transit Strategy and Regional Emerging Technologies Strategy, and update the RTP vision, goals and performance targets, RTP Finance Plan, Regional Transportation Safety Strategy, Regional Freight Strategy, and transportation design policies. (ONGOING)
- Coordinate with other related UPWP planning activities, including the Title VI/Environmental Justice Program, Public Involvement, Regional Transit Strategy, , Regional Travel Options Program, Regional Freight Program and related studies, Regional Mobility Program, Economic Value Atlas, Designing Livable Streets, Southwest Corridor Project, Division Transit Project and relevant ODOT and local planning activities and studies. (ONGOING)
- Collaborate with the Metro Research Center to identify and address data needs, improve tools for evaluating and monitoring RTP performance outcomes and seek coordination and partnership opportunities with the Transportation Research and Education Center (TREC) and PORTAL at Portland State University, the Oregon Modeling Steering Committee (OMSC), ODOT, Washington DOT, TriMet, SMART and SW Regional Transportation Council to support on-going RTP monitoring, the region's Congestion Management Process (CMP), FAST Act implementation, Regional Mobility Program and regional GHG emissions analysis. (ONGOING)
- Promote cooperation and coordination across MPO boundaries and across State boundaries where appropriate to ensure a regional approach to transportation planning. (ONGOING)

Previous Work:

- Maintained web page to provide access to information about the current adopted plan, 2018 RTP update, opportunities to provide input and technical work group meetings. Materials can be downloaded at: www.oregonmetro.gov/rtp. (ONGOING)
- Draft updated RTP performance targets that address RTP goals, federal planning factors and MAP-21 goal areas and subsequent federal rulemaking to implement MAP-21 and the FAST Act. (FEBRUARY 2018)
- Technical review and public review drafts of the 2018 Regional Transit Strategy, 2018 Regional Freight Strategy, 2018 Regional Emerging Technologies Strategy and 2018 Regional Safety Strategy. (NOVEMBER-JANUARY 2017 AND JUNE 2018)
- Public review drafts of the 2018 Regional Transportation Plan. (JUNE 2018)
- Draft updated RTP project list reflecting two levels of investment – a financially constrained list of project priorities that meets federal requirements and a more ambitious list of additional unfunded regional transportation project priorities that reflects the level of investment the region agrees to work together to fund, reflecting policy direction from the Metro Council and JPACT. (SEPTEMBER 2017 AND MAY 2018)
- Four Regional Leadership Forums through which the Metro Council convenes joint meetings of JPACT and MPAC to provide policy direction to staff on updating the plan's policies, project priorities, and implementation actions. The first three forums were held in FY 16-17 and included state legislators and community and business leaders. The last forum was held in 2018. (APRIL 2016, SEPTEMBER 2016, DECEMBER 2016 AND MARCH 2018)
- Draft 2018 RTP Financial Forecast that estimates the amount of funding that is reasonably

I. GENERAL MPO TRANSPORTATION PLANNING

anticipated to be available under federal law to implement regional transportation investment priorities, as well as operate and maintain the regional transportation system for the plan period. (JUNE 2017 AND MARCH 2018)

- Call for Projects/project solicitation materials that define a process for local coordinating committees, city of Portland, Port of Portland, ODOT, and transit providers to submit updated project lists for the financially constrained system as well as a more ambitious system that fit within revenue projections and demonstrate progress toward achieving the plan's goals and performance targets. (JUNE 2017 AND MARCH 2018)
- Draft updated RTP vision, goals and objectives that address the region's six desired outcomes, and federal planning factors and MAP-21 goal areas. (MAY 2017 AND DECEMBER 2018)
- Draft 2018 RTP Existing Conditions Chapter that documents key trends and current systems conditions for all modes of travel, including the movement of goods and freight. The information was reported through Regional Snapshots in support of the region's Congestion Management Process and identification of current and future regional transportation needs and potential solutions, and the project solicitation process for updating investment priorities in the RTP. (JANUARY 2017)
- Regional Snapshot No. 3 and No. 7 on Transportation to document experiences of residents and businesses using the regional transportation system, trends affecting travel in the region, and began documenting current system conditions and current plan performance. Information is posted at: www.oregonmetro.gov/regional-snapshots. (APRIL 2016 AND JUNE 2017)
- Regionally-coordinated and adopted population, household and job growth forecast for the years 2015 to 2040 to support RTP modeling and regional planning activities. (OCTOBER 2016)
- Provided elderly and disabled transportation planning support in partnership with the region's transit providers through most recent update to TriMet's Coordinated Transportation Plan for Seniors and People with Disabilities. (JUNE 2016)
- Adopted the work plan and public engagement plan for the 2018 RTP update. (DECEMBER 2015)
- Adopted the 2014 Climate Smart Strategy and supporting implementation actions. The strategy and supporting implementation actions will be further implemented through the 2018 RTP update. (DECEMBER 2014)
- Adopted the 2014 RTP. The update was limited in scope, focusing on maintaining compliance with federal law addressing two corrective actions identified in the 2012 Federal Certification Review, conducting an expanded environmental justice and Title VI assessment and incorporating system map and project list changes identified in local TSPs and regional plans developed or adopted since 2010, such as the Regional Active Transportation Plan and Regional Transportation Safety Plan. (JULY 2014)
Adopted the Environmental Justice and Title VI Assessment for the 2014 RTP and 2015-18 Metropolitan Transportation Improvement Program with recommendations for future refinements to be addressed in the 2018 RTP update and development of 2018-21 MTIP. The assessment included a demographic analysis and a regional-level disparate impacts and benefits and burdens analysis. The assessment also identified recommendations for future research and transportation equity analysis refinements that were further addressed through the 2018 RTP update. (JULY 2014)
- Developed and adopted the first Regional Active Transportation Plan (ATP). The 2014 ATP identified recommendations related to transportation safety and design that were further

- addressed in the 2018 RTP update. (JULY 2014)
- Developed the first Regional Transportation Safety Plan and coordinated efforts to identify and recommend short- and long-term actions related to planning, transportation design, data collection, and performance monitoring. The recommendations were further refined and addressed as part of updating the Regional Transportation Safety Plan through the 2018 RTP update. (MAY 2012)

Methodology for the Project:

Regional Transportation Plan (RTP): The focus of the current fiscal year will be continuing a major update to the RTP following the work plan and public engagement plan adopted by JPACT and the Metro Council in December 2015. The update began in May 2015. Partnership and engagement activities, planning work and policy discussions to support development of an updated plan will continue in 2018 with final adoption of the 2018 RTP scheduled for December 2018. The final plan will be effective for federal purpose upon adoption by JPACT and the Metro Council. The final plan will be sent to the LCDC to begin their approval process in the manner of periodic review in 2019.

Updates to the plan will address a number of regional, state and federal planning requirements, and, as a result, require special coordination with staff with state, regional, county and city agencies, as well as significant public engagement efforts, consistent with Metro’s Public Engagement Guide. The update will also address actions and recommendations identified in relevant planning efforts, including the 2012 Regional Transportation Safety Plan, the 2013 Portland Region Westside Freight Access and Logistics Analysis, and subsequent 2016 Washington County Freight Study, the 2014 RTP update, the 2014 Regional Active Transportation Plan, the 2014 Climate Smart Strategy, the 2014 Economic Impacts of Congestion Study, Metro’s Diversity Equity and Inclusion Strategy, TriMet’s Service Enhancement Plans and 2016 Coordinated Transportation Plan for Seniors and People with Disabilities, the 2017 SMART Master Plan, and updates to the 2011 Oregon Freight Plan to meet FAST Act requirements.

The update will also address FHWA/FTA Planning Emphasis Areas (PEA) related to models of regional planning cooperation, access to essential services for underserved populations and MAP-21 and FAST Act implementation and related performance measurement requirements as well as recommendations or corrective actions identified in the 2017 Federal Certification Review to the extent practicable.

Several UPWP subarea and modal planning activities will be undertaken throughout FY 2018-19 that will be coordinated with and provide input to the 2018 RTP update. Related Metro-led UPWP activities include the Regional Transit Strategy, Regional Freight Program, Economic Value Atlas, Designing Livable Streets, Transportation System Management and Operations, Regional Travel Options and Regional Mobility programs, Division Transit Project and Southwest Corridor Plan. Related ODOT Region 1-led UPWP activities will also inform the 2018 RTP update.

Additional regional transportation planning tasks are anticipated to be identified through the 2018 RTP update to advance implementation of the plan. These tasks will be amended into the UPWP as appropriate.

The 2018 RTP update work plan will be accomplished using the following approach:

- **Document key regional trends and challenges, existing conditions and needs.** Update Chapter 1 of the RTP to document key trends and challenges affecting travel in the region as well as current and future regional transportation needs.
- **Update shared vision and outcomes-based policy goals and performance targets.** Refine

the region’s vision for the transportation system and regional goals, objectives and performance targets that identify specific outcomes the region wants to achieve with investments in the transportation system. This work will include significant coordination and collaboration with TriMet, SMART and ODOT as the agencies also set performance measures and targets in response to federal MAP-21 and FAST Act rulemaking. This work will be completed in December 2018.

- **Update outcomes-based performance evaluation framework.** Continue to update data, methods and analytic tools as needed to address MAP-21 and FAST Act performance-based planning requirements and the federally-required congestion management process, and improve the region’s ability to measure the benefits and impacts of investments across economic, social equity and environmental outcomes. This work will include convening two technical work groups of staff from local jurisdictions, transit providers, TREC at Portland State University, environmental justice leaders and other topical experts to refine and further advance the region’s methodology for conducting a regional transportation system analysis and transportation equity analysis for the 2018 RTP. This work will also seek to develop and pilot the use of project-level criteria to provide additional information to stakeholders and decision-makers to help identify a pipeline of priority projects on the regional transportation system that are anticipated to seek regional, state and federal funding to advance them. This work will be completed in December 2018.
- **Update Congestion Management Process (CMP) Reporting.** This work will include a limited update to data used in the Regional Mobility Corridor Atlas to serve as a factual foundation for documenting current congestion, high crash locations, access to travel options and other information as part of the federally-required congestion management process. The information and findings will be reported in a regional snapshot focused on transportation and a separate existing conditions report that will inform identification regional transportation needs in advance of updating the RTP investment priorities. In addition, staff will work with local, regional and state partners to review and identify recommendations for refinements to the region’s CMP data collection and reporting approach. The review will aim to more effectively address MAP-21 and FAST Act performance-based planning and target-setting requirements, identify data gaps and limitations, collaborate with TREC, ODOT, TriMet and SMART to bring relevant data into the atlas and better align the CMP reporting with the RTP’s outcomes-based evaluation framework and performance measures and targets. This work will include convening a technical work group on performance measures to help identify recommendations for refinements to the atlas and the CMP reporting approach. This work will be completed in December 2018.
- **Update RTP Financial Plan:** Continue work to update estimates of funding reasonably expected to be available under federal law and identify potential new funding mechanisms in coordination with local jurisdictions, transit agencies, ODOT, and business and community leaders to address current and future transportation needs, including keeping the existing transportation system in a state of good repair. This includes accounting for anticipated revenues from federal, state, regional, local, and private sources, and user fees. This work will result in a new financially constrained revenue forecast that meets federal requirements as well as a more ambitious revenue forecast that reflects the level of investment the region agrees to work together to pursue to fund additional regional transportation project priorities. This work will be completed in December 2018.
- **Update regional policies and strategies.** Update policy elements of the RTP (Chapter 2) as

needed to address new federal and state requirements, 2012 Transportation Safety Plan recommendations, and recent regional policy actions, including adoption of the 2014 Climate Smart Strategy, the 2014 Regional Active Transportation Plan and the 2014 Regional Transportation Plan, and new policies and strategies recommended through this update and related Metro projects and programs. This work will be completed in December 2018.

- **Update shared investment strategy and action plan.** Update regional strategies for safety, transit, and freight, and related near- and long-term investment priorities, actions and partnerships to support implementation. This will include developing policy recommendations on emerging concepts related to emerging technologies, such as driverless vehicles and shared mobility services, and disaster resilience. Analysis of the two RTP investment strategies will also include demonstrating the region’s priorities continue to meet the federal Clean Air Act and Title VI/Environmental Justice requirements, and the state-mandated greenhouse gas emissions reduction target for light-duty vehicles. This work will be completed in December 2018.
- **Implement Climate Smart Strategy.** Update the plan’s policies, investment priorities and actions to address recommendations for increased investment in transit and transportation system management and operations programs and projects. This will also include background work to support the greenhouse gas emissions analysis that will be completed for the 2018 RTP update, and address anticipated amendments to the Metropolitan Area Greenhouse Gas Target Rules. This work will continue in FY 18-19.
- **Update Regional Transportation Safety Strategy.** Continue work to update the Regional Transportation Safety Plan. This work will include policy and data coordination and collaboration with ODOT as the agency sets statewide safety-related performance measures and targets to respond to MAP-21 and FAST Act. This work will be completed in December 2018.
- **Update Regional Freight Strategy.** Continue work to update the Regional Freight Plan in coordination with the Regional Freight Program with the following work products: updated economic figures and commodity flow data; new freight performance measures that inform near- and long-term investment priorities and FAST Act required freight performance targets and measures; updated Regional Freight Network map; and new sections on regional freight funding and the federal FAST Act and FASTLANE grant program. This work will be completed in December 2018 in coordination with an update to the 2011 Oregon Freight Plan, including identification of freight bottlenecks in the Portland region and other areas of the state to help ODOT direct funding to projects that alleviate critical freight bottlenecks.
- **Develop Regional Transit Strategy.** Continue work to develop a Regional Transit Strategy, including:
 - Collaborate and coordinate with TriMet and SMART and other transit providers to develop a regional transit vision and report on FAST Act required transit performance targets and measures.
 - Work with transit stakeholders to develop or adopt required performance targets and measures.
 - Improve data and methods for evaluating transit performance and expected benefits.
 - Update the regional transit network vision and transit system expansion policies to inform investment priorities.
 - Incorporate relevant service and infrastructure needs and priorities, strategies and

actions from TriMet's 2016 Coordinated Transportation Plan for Seniors and Persons with Disabilities.

- Provide oversight of contractor deliverables. This work will be completed in December 2018.
- **Develop Regional Emerging Technologies Strategy.** Continue work to develop a Regional Emerging Technologies Strategy in coordination with the 2018 RTP update. This work will include development of policies and strategies that will be incorporated in the 2018 RTP. The policies and strategies will focus on the key areas where public agencies need to act in the next decade to respond to the most pressing issues presented by emerging technologies and stay on track to meet regional goals for social equity, the environment, economic prosperity, land use and transportation over the long term. This work will be completed in December 2018.

Entities Responsible for the Project:

- Metro – Product Owner/Lead Agency
- Oregon Department of Transportation – Cooperate/Collaborate/Coordinate
- TriMet – Cooperate/Collaborate/Coordinate
- SMART – Cooperate/Collaborate/Coordinate

Other Project Stakeholders:

- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- TransPORT Subcommittee to TPAC
- Cities and counties in the Metro region
- Bi-State Coordination Committee, Southwest Washington Regional Transportation Council (RTC), C-TRAN, and other Clark County governments
- Federal and State legislators and elected officials representing counties and cities in the region
- Northwest Region Area Commission on Transportation (NW ACT)
- Port of Portland
- Port of Vancouver
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- Environmental Protection Agency (EPA)
- Oregon Transportation Commission (OTC)
- Land Conservation and Development Commission (LCDC)
- Department of Land Conservation and Development (DLCD)
- Oregon Department of Environmental Quality (DEQ)
- Oregon Health Authority
- Oregon MPOs
- Community groups and organizations involved in health, equity, environmental justice, economic development, business, climate change, land use and transportation issues and serving the needs of historically underrepresented communities (e.g., communities of color, low-income persons, and persons with limited English proficiency) as well as older adults, youth, people with disabilities

I. GENERAL MPO TRANSPORTATION PLANNING

- Organizations and advisory committees serving regional bicycle, pedestrian, freight, motor vehicle and transit needs
- Transportation Research and Education Consortium (TREC) and Portland State University
- Interested public
- Special Transportation Funding Advisory Committee (STFAC)

Major Project Deliverables and Schedule for Completion in FY 2018-2019:

- Quarterly progress reports. (QUARTERLY)
- Public information and technical and policy meeting materials on the RTP via Metro’s website. (ONGOING)
- RTP amendments, if necessary (ONGOING)
- MAP-21 and FAST Act implementation, including the implementation of the performance-based planning framework, goal areas, target setting, and performance reporting through the 2018 RTP update and coordination and collaboration with federal and state agencies and transit providers on statewide and regional target setting as directed by MAP-21. (ONGOING)
- Public engagement activities and reports documenting engagement activities, consistent with the adopted Public Engagement Plan for the 2018 RTP update. (ONGOING)
- Reports, memoranda, legislation and other materials documenting research, analysis, recommended refinements to the regional transportation vision, goals, performance targets and measures, visualizations of information, policies, financial assumptions, investment priorities, CMP reporting recommendations, and outreach activities conducted to support development and adoption of the 2018 RTP. (ONGOING)
- Implementation of the region’s Coordinated Transportation Plan for Seniors and People with Disabilities (CTP). (ONGOING)
- Adoption drafts of the 2018 Regional Transportation Plan and updated components, including the 2018 Regional Transit Strategy, 2018 Regional Freight Strategy, 2018 Emerging Technologies Strategy and 2018 Regional Safety Strategy. (FIRST QUARTER)

Funding History:

Fiscal Year	Total Budget	FTE Comparison
^{1,2} 2011-12	\$2,110,058	11.965
^{1,2} 2012-13	\$1,497,674	9.099
^{1,2} 2013-14	\$698,555	3.980
^{1,2} 2014-15	\$1,105,379	3.130
² 2015-16	\$1,462,908	6.000
² 2016-17	\$1,696,646	8.555

1The total budget and FTE comparison for FY 2011-12 and FY 2012-13 includes both the Regional Transportation Planning and Climate Smart Strategy work. The two projects were split into separate narratives for the 2013-15 UPWP.

2This program budget and FTE comparison was included Transportation Planning in these years.

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FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services	\$	523,320
Interfund Transfers	\$	234,312
Materials and Services	\$	15,600

Resources:

PL	\$	119,350
STBG	\$	314,574
5303	\$	133,845
5303 Pre-MAP21	\$	77,070
Supplemental Allocation		
Metro	\$	128,394

TOTAL \$		773,232	TOTAL \$		773,232
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Full-Time Equivalent Staffing

Regular Full-Time FTE	4.163
TOTAL	4.163

FY 2018-19 Cost and Funding Sources:

Requirements:

Personal Services	\$	371,763
Interfund Transfers	\$	188,629
Materials and Services	\$	15,600

Resources:

PL	\$	253,272
STBG	\$	43,913
5303	\$	245,663
Metro	\$	33,143

TOTAL \$		575,992	TOTAL \$		575,992
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Full-Time Equivalent Staffing

Regular Full-Time FTE	2.944
TOTAL	2.944

Regional Transit Strategy

Staff contact: Jamie Snook, Jamie.Snook@oregonmetro.gov

Description:

Transit has a significant role in supporting the 2040 Growth Concept – the region’s long-range strategy for managing growth. The 2040 Growth Concept calls for focusing future growth in the Portland Central City, regional and town centers, station communities, main streets, 2040 corridors and employment areas, and includes policies to connect the Portland Central City and regional centers together with high capacity transit, which can include light rail, bus rapid transit, commuter rail, or streetcar. The Regional Transportation Plan (RTP) expands this vision to include a connected network of regional and local transit service that is complemented by transit-supportive land uses, safe and convenient bike and pedestrian connections to transit, and other facilities, programs and services designed to make transit more convenient, frequent, accessible and affordable.

The Regional Transit Strategy, formerly known as the Regional High Capacity Transit System Plan, will provide a coordinated vision of future transit for the region to support the 2040 Growth Concept, Climate Smart Strategy, and Regional Transportation Plan. The plan will include improvements to bus service as well as future investments in high capacity transit improvements. The Plan will also include an update to the System Expansion Policy that will provide local and regional partners with direction on how to move future projects forward. This work will be conducted as part of the 2018 Regional Transportation Plan update and will be closely coordinated with the Future of Transit vision being developed by TriMet through its Service Enhancement Plans and the update to Transit Master Plan by the South Metro Area Regional Transit (SMART) district. This strategy will also incorporate relevant service and infrastructure needs and priorities, strategies and actions from TriMet’s 2016 Coordinated Transportation Plan for Seniors and Persons with Disabilities.

Objectives:

- Implement the 2040 Growth Concept, Climate Smart Strategy and the RTP.
- Update RTP transit-related policies and performance measures to guide consideration of the effect of investments on transit performance and ability to support broader mobility, land use, urban form, environmental and social equity objectives.
- Update the current Regional Transit Network Map and High Capacity Transit Map in the RTP to reflect a coordinated vision for future transit service in the region that includes high capacity transit and regional, local and community-based transit services.
- Update the Transit System Expansion Policy to provide a clear and efficient implementation process for major transit investments.
- Recommend refinements and/or amendments to RTP transit-related policies, strategies and investments to support the coordinated vision for future transit service in the region.
- Recommend a coordinated strategy for future transit investments and identify potential partnerships, strategies and funding sources for implementation.
- Implementation of the Regional Enhanced Transit Concept Pilot Program.

Previous Work:

- The Regional High Capacity Transit System Plan and System Expansion Policy, adopted as a component of the RTP in 2010, identified the region’s HCT corridor priorities in support

- of the 2040 Growth Concept and RTP. (August 2010)
- Developed and adopted the first Regional Active Transportation Plan to support improved bike and pedestrian access to transit and other community destinations. (July 2014)
- The Climate Smart Strategy, adopted in December 2014, identified increased capital and operational transit investments and supporting infrastructure as a key component of the region's strategy for reducing greenhouse gas emissions from light-duty vehicles. (DECEMBER 2014)
- Trimet's adopted Coordinated Transportation Plan for Seniors and Persons with Disabilities identifies service and infrastructure needs and priorities, strategies and actions to improve travel options and services for older adults and persons living with disabilities. (July 2016)

Methodology:

The methodology includes stakeholder and public outreach, technical analysis and policy discussions that will be coordinated with other related UPWP planning activities, including the 2018 RTP update and SMART Transit Master Plan update, Metro's My Place in the Region and Regional Equity Strategy. Public outreach, including, but not limited to workshops, meetings in places where people gather (e.g., farmers markets), community meetings and web surveys will be conducted. An updated System Expansion Policy evaluation framework will be developed consistent with the RTP to guide how to move future projects forward. Approval of the Regional Transit Strategy is by the Metro Council after consideration of public comments and recommendations from JPACT and MPAC, Metro's regional policy advisory committees.

Schedule for Completing Activities:

- Update the Transit System Expansion Policy. (WINTER 2018)
- Integrate appropriate Regional Transit Plan investments and strategies in draft 2018 RTP. (2017-2018)
- Finalize the Regional Transit Strategy (WINTER 2018)
- Advance ETC projects to project development. (SUMMER/FALL 2018)

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Reports documenting technical analysis and outreach activities. (ONGOING)
- Draft Regional Transit Strategy (FIRST QUARTER)
- Updated System Expansion Policy (FIRST QUARTER)
- Public input on Regional Transit Strategy and transit related elements of the 2018 RTP (FIRST QUARTER)
- Final Regional Transit Strategy report (THIRD QUARTER)

Entity/ies Responsible for Activity:

Metro - Lead Agency

TriMet – Cooperate/Collaborate

SMART – Cooperate/Collaborate

Other stakeholders - Consider/Collaborate:

- Transportation Policy Alternatives Committee (TPAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Technical Advisory Committee (MTAC)
- Metro Policy Advisory Committee (MPAC)
- Federal Highway Administration (FHWA)

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- Federal Transit Administration (FTA)
- Cities within Metro’s boundaries
- Clackamas, Multnomah, Washington, and Clark Counties
- Oregon Department of Transportation (ODOT)
- Other neighboring transit districts, including C-TRAN
- Community groups and organizations involved in equity, environmental justice, economic development, business, climate change, land use and transportation issues and serving the needs of communities of concern, including communities of color, low-income persons, older adults, youth, people with disabilities, and persons with limited English proficiency.
- Citizens of the region

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2015-16	\$61,379	0.275
2016-17	\$80,516	0.375

FY 2017-18 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	59,145	STBG	\$	74,251
Interfund Transfers	\$	24,153	5303	\$	493
			Metro	\$	8,555
TOTAL \$ 83,298			TOTAL \$ 83,298		

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.4
TOTAL	0.4

FY 2018-19 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	69,623	PL	\$	16,230
Interfund Transfers	\$	29,566	STBG	\$	70,302
			5303	\$	4,137
			Metro	\$	8,520
TOTAL \$ 99,189			TOTAL \$ 99,189		

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.455
TOTAL	0.455

Metropolitan Transportation Improvement Program

Staff contact: Ted Leybold, Ted.Leybold@oregonmetro.gov

Description:

The Metropolitan Transportation Improvement Program (MTIP) is a critical tool for implementing and monitoring the progress of the Regional Transportation Plan (RTP) and 2040 Growth Concept. The MTIP programs and monitors funding for all regionally significant projects in the metropolitan area. The MTIP administers the allocation of urban Surface Transportation Block Grant (STBG) Program, Congestion Mitigation Air Quality (CMAQ) Improvement Program, and Transportation Alternatives (TA) funding awarded through the Metro Regional Flexible Fund process.

The MTIP reflects the approved RTP's first four year implementation program of funding goals and regional transportation strategies. The MTIP also is a project implementation financial document used to verify and obligate federal project transportation funding. It reflects how funding for projects and their specific phases will be expended to implement the project as part of the first four years of the RTP. The MTIP must be fiscally constrained and demonstrate the programming of project funding does not exceed the funding capacity in any single year of the MTIP. Finally, the MTIP through its major four-year update provides a reconfirmation of implementing the region's transportation control measures (TCMs) for air quality, ensuring federal transportation funds are being programmed, obligated, and expended correctly and in a timely fashion to meet transportation obligations to reduce vehicle emissions.

Development and management of the MTIP is governed under 23 CFR 450.300-336, Metropolitan Transportation Planning and Programming. Projects included in the MTIP are generally one of five types:

1. Projects on the State Highway System
2. Projects on the regional arterial system
3. Major transit investments in the region
4. Separated active transportation projects on the regional network
5. The project is a planning project as part of a regional major investment study, or will complete project development work (Planning through Preliminary Engineering).

As stated previously, the MTIP represents the first four-year implementation program of projects from the approved long range RTP. Before being added to the MTIP, the project must first be part of the fiscally constrained portion of the RTP. From there, adding projects into the MTIP will satisfy one or more of the following criteria:

- The transportation project is awarded federal funding.
- The project is located in the State Highway System and was awarded ODOT administered funding.
- The transportation project is locally funded, but requires any form of required federal approvals to be implemented.
- The transportation project helps the region meet its TCM requirements to reduce vehicle emissions.
- The transportation project is locally funded, but regionally significant and clearly meets the goals and strategies of the approved RTP.

Through its major update, the MTIP verifies the region's compliance with air quality and other federal requirements, demonstrates fiscal constraint over the MTIP's four-year period and informs the region on progress in implementation of the RTP. Between major MTIP updates, the MPO manages and amends the MTIP projects as required to ensure project funding can be obligated based on the project's implementation schedule. MTIP amendments are ongoing and generally fall within one of three categories:

Formal amendments:

- Result due to substantial funding, policy, or scope changes to the project.
- Require a detailed documentation narrative, a confirmation of consistency with the region's long-range plan and that the region's fiscal constraint findings have not been impacted or violated.
- Require formal approval by Metro's Joint Policy Advisory Committee on Transportation (JPACT) and Council approval.
- Requires approval by U.S. DOT.

Administrative amendments/modifications:

- Minor changes and funding adjustments that clearly do not impact fiscal constraint or RTP consistency.
- The range of possible administrative changes generally are negotiated and pre-approved between the MPO and U.S. DOT.
- Do not require formal Metro approval.
- Approval normally by ODOT with possible review by U.S. DOT

Technical corrections/modifications:

- Represent extremely minor corrections (e.g. spelling errors, or typos)
- No impact on anything as a result of the correction.
- Notification to ODOT required, but approval not necessary by ODOT or U.S. DOT.

As mentioned earlier, the MTIP is also subject to federal and state air quality requirements, and a determination is made during each MTIP update to ensure consistency with the State Implementation Plan for air quality and implementation of its TCMs. These activities require special coordination with staff from Oregon Department of Transportation (ODOT), TriMet, South Metro Area Regional Transit (SMART), and other regional, county and city agencies, as well as public-involvement efforts, consistent with Metro's public involvement plan.

Objectives:

Developing, updating, and managing the MTIP requires a cooperative, continuous, and comprehensive process to prioritize projects from the RTP for funding which includes (ONGOING):

MTIP Management: Effectively administer the existing MTIP and completing required federal responsibilities as outlined in the applicable CFRs and regulations that include:

- Collaborate with partner TIP administering agencies to document roles and responsibilities utilizing tools such as planning agreements, project charters, regular coordination meetings, and other resources.
- Programming transportation projects in the region consistent with Federal rules and

regulations. (ONGOING)

- Ensure funding in the first two years of the MTIP is available or committed and that costs are programmed in year-of-expenditure dollars. (ONGOING)
- Document the cooperative revenue estimation process that ensures adequate funding is available by year to operate and maintain the system, adequate revenue is available to deliver projects on the schedule proposed in the TIP, and all other financial planning and fiscal constraint requirements. (ONGOING)
- Consult with program stakeholders, including formal consultation with required entities in compliance with federal regulations. (ONGOING)
- Continue improvements to the on-time and on-budget delivery of the local program of projects selected for funding through the Transportation Priorities process. (ONGOING)
- Continue the MTIP public awareness program to include updated printed materials, web resources and other material to increase understanding of the MTIP process. (ONGOING)
- Work with the Oregon MPO consortium, ODOT and transit agencies to consider options to utilize better data management tools for managing the TIP and financial plan. In the interim, maintain Transtracker database with project programming, amendment, obligation information and revenue information. (ONGOING)
- Implement new performance measurement requirements (ONGOING).

MTIP Update: Coordinate with the ODOT, TriMet and SMART to begin creation of the 2021-24 MTIP and STIP, including:

- Monitor and update the financial forecast.
- Complete the policy update to provide MPO policy direction and input to the various funding allocation programs for allocating federal funds to ensure progress in implementing the goals and objectives of the RTP.
- Utilize the Congestion Management Process (CMP) in analyzing the existing transportation system and developing the priority projects for the 2021-24 MTIP process.
- Prepare for adoption of the 2021-24 MTIP through analysis and documentation of the funding allocation and programming processes relative to federal regulations.

Local Project Support: Provide administrative and technical support to local project development and construction. This includes support of initial project development tasks performed as a planning phase activity. The administrative responsibilities for Metro, ODOT and local agency staff performing these planning activities are described in Appendix A.

Previous Work:

Work completed in the 2017-18 fiscal year included:

- Adoption of the 2018-2021 MTIP and its Air Quality Conformity findings.
- Updated the MTIP amendment process to ensure consistency with federal regulations for formal amendments vs. administrative adjustments and with Metro's federally approved public notification and comment processes.
- Adoption of a project charter for the development of the 2021-24 MTIP and coordination with ODOT, TriMet and SMART in the allocation and programming of funding to projects administered by those agencies.
- Administration of the MTIP, including reviewing, evaluating, and processing of MTIP amendments, project selection, financial plan and scope/schedule adjustments.
- Participating and assisting ODOT Local Agency Liaisons (LAL) develop and execute RFFA

- project funded IGAs and obligate federal funding.
- Support in administering local project development plans (UPWP Regionally Significant projects)

Methodology:

The MTIP is updated and maintained through extensive cooperation and collaboration with partner agencies, a rigorous public involvement process, and administrative procedures such as the maintenance of a project and financial database.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Funding forecast through the FFY 2024 (ONGOING).
- Adoption of the 2021-24 MTIP and Regional Flexible Fund allocation (RFFA) policy report (SUMMER 2018)
- CMAQ, STBG, and TA project implementation monitoring report (QUARTERLY)
- MTIP Fiscal Constraint report. (ONGOING)
- Amendments to current 2018-21 MTIP (ONGOING).
- Completion of the FFY 2018 Obligation Report (DECEMBER 2018).
- Monitoring the obligation and implementation of several project development plans (UPWP Regionally Significant Projects) (ONGOING).
- Monitoring and review assistance in the development of RFFA funded CMAQ, STBG, and TA Scope of Work, Project Prospectus, and IGAs to ensure federal funds are obligated per their milestone schedule correctly and in a timely fashion. (ONGOING)

Entities Responsible for Activity:

- Metro – Product Owner/Lead Agency
- Oregon Department of Transportation – Cooperate/Collaborate
- TriMet – Cooperate/Collaborate
- South Metro Area Regional Transit – Cooperate/Collaborate

Other Stakeholders:

Local partner agencies and members of the public, including:

- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)
- Oregon Transportation Commission (OTC)
- Oregon Department of Environmental Quality (DEQ)
- Oregon Metropolitan Planning Organization Consortium (OMPOC)
- US Environmental Protection Agency (EPA)
- Environmental Justice and Underserved work group and organizations involved with minority and non-English speaking residents

Schedule for Completing Activities:

- Adoption of the 2021-24 MTIP and Regional Flexible Fund allocation (RFFA) policy report (SUMMER 2018)
- Completion of the FFY 2018 Obligation Report (DECEMBER 2018).

I. GENERAL MPO TRANSPORTATION PLANNING

Please refer to schedule information provided in the *Objectives* section for a list on-going activities without scheduled completion dates.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2013-14	\$560,466	3.26
2014-15	\$1,020,003	5.375
2015-16	1,086,933	5.6
2016-17	\$1,164,993	5.8

FY 2017-18 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	669,545	PL	\$	355,865
Interfund Transfers	\$	283,387	STBG	\$	233,439
Materials and Services	\$	74,500	5303	\$	369,158
			Metro	\$	68,970
TOTAL \$ 1,027,432			TOTAL \$ 1,027,432		

Full-Time Equivalent Staffing

Regular Full-Time FTE	5.55
TOTAL	5.55

FY 2018-19 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	757,814	PL	\$	49,999
Interfund Transfers	\$	339,979	STBG	\$	674,970
Materials and Services	\$	115,841	5303	\$	369,158
			Metro	\$	119,505
TOTAL \$ 1,213,634			TOTAL \$ 1,213,634		

Full-Time Equivalent Staffing

Regular Full-Time FTE	6.025
TOTAL	6.025

Note: Include as part of the Annual UPWP Master Agreement – Not a Regionally Significant Stand Alone Project. No consultants utilized. Staff salary funding.

Air Quality Program

Staff Contact: Grace Cho, grace.cho@oregonmetro.gov

Description:

The Air Quality Program ensures activities undertaken as part of the Metropolitan Planning Organization (MPO), such as the Regional Transportation Plan (RTP) and the Metropolitan Transportation Improvement Program (MTIP), for the Portland metropolitan area address state and federal regulations and coordinates with other air quality initiatives in the region.

As part of state and federal commitments, the Air Quality Program ensures the region's MPO activities are carrying out the commitments and rules set forth as part of the Portland Area State Implementation Plan (SIP) and state and federal regulations pertaining to air quality and air pollution. The SIP is overseen by the Oregon Department of Environmental Quality (DEQ) and approved by the U.S. Environmental Protection Agency (EPA). The following activities comprise of the Portland area SIPs:

- Monitor air pollution levels for criteria air pollutants, particularly ozone because of the region's history, and proactively work to address increasing ozone pollution levels to prevent a non-attainment designation
- Monitor vehicle miles traveled (VMT) per capita and if key thresholds are triggered (as identified in the SIP) then undertake the contingency provisions outlined in the SIP
- Facilitate interagency consultation with federal, state, regional, and local partners
- Continue to implement the Transportation Control Measures as outlined, unless a specific date or completion point has been identified in the SIP
- Work collaboratively with DEQ as issues emerge related to federal air quality standards, mobile source pollution, and transportation programs

Because the Portland metropolitan region has successfully completed two consecutive 10-year maintenance plans after receiving an attainment designation from U.S. EPA as required by the Clean Air Act, the region is no longer required to conduct Air Quality Conformity Determinations (AQCDs) specifically for carbon monoxide to assess the air quality impacts of MPO activities and determine if transportation investments are conducive to the area meeting federal and state air quality standards.

In addition to the state and federal components, the Air Quality Program includes participation and partnerships on other regional initiatives related to air quality.

Objectives:

- Continue to implement the provisions set forth by the Portland Area Second 10-Year Maintenance Plan SIP. (ONGOING)
- Monitor the region's vehicle miles traveled and air pollution levels to ensure a contingency action is not triggered. (ONGOING)
- Serve and continue to coordinate interagency consultation on air quality related issues in the Portland metropolitan region. (ONGOING)
- Continue to maintain and implement emissions modeling tools for air quality analyses purposes. (ONGOING)
- Ensure MPO activities are consistent with Federal air quality rules and regulations.

(ONGOING)

- Consult, participate, and partner on activities as it relates to the implementation of the Portland Area Second 10-Year Maintenance Plan SIP. (ONGOING)
- Carry out any other mutually agreed upon air quality related activities outlined in the Memorandum of Understanding between Metro and DEQ.
- Participate and partner on air quality related activities which are beyond the scope of federal regulations and transportation conformity. (ONGOING)

Previous Work:

Work completed in the 2016-17 fiscal year included:

- Metro staff participation in EPA Region 10 quarterly conformity information sharing sessions;
- Development and approval of the 2018-2021 MTIP Air Quality Conformity Determination;
- Continued on-going participation and partnerships with local, regional, and state agencies on various air pollution mitigation efforts. Efforts are not solely focused on transportation/mobile source emissions; and
- Continued partnership with Oregon Department of Environmental Quality (DEQ) to assist with modeling to support background and regulatory compliance efforts addressing the 2015 updated ozone national ambient air quality standards (NAAQS).

Methodology:

For compliance with the SIP, monitoring activities are undertaken with the development of each RTP and MTIP as part of the suite of technical analysis which takes place for the plan and programming. These activities involve collecting data from DEQ and the Oregon Department of Transportation (ODOT) looking at annual air pollution reports and vehicle miles traveled data. For other on-going activities, consultation is carried out with federal, state, regional, and local partners to gather information, direction, and feedback.

For other regional air quality initiatives, participation, partnership, and disseminating information are main activities.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

- Consult, coordinate, and collaborate on air quality and transportation conformity related items with Oregon DEQ, local, regional, state, and federal partners as well as interested community-based organizations. (ONGOING)
- Updated Metro-DEQ Memorandum of Understanding (MOU)

Entity/ies Responsible for Activity:

- Metro – Product Owner/Lead Agency
- Oregon State Department of Environmental Quality – Consult/Collaborate
- Transportation Policy Alternatives Committee (TPAC) – Consult/Collaborate
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)

Other Stakeholders:

- Local partner agencies and members of the public
- Joint Policy Advisory Committee on Transportation (JPACT)
- US Environmental Protection Agency (EPA)
- Southwest Washington Regional Transportation Commission (SWRTC)

Schedule for Completing Activities

- State Implementation Plan monitoring (On-Going)

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2015-16	26,689	0.15
2016-17	\$28,334	0.155

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 31,172	PL	\$ 43,432
Interfund Transfers	\$ 12,730		
TOTAL	\$ 43,902	TOTAL	\$ 43,432

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.255
Total	.0255

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 30,656	PL	\$ 43,674
Interfund Transfers	\$ 13,018		
TOTAL \$	43,674	TOTAL \$	43,674

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.24
TOTAL	0.24

Civil Rights and Environmental Justice

Staff contact: Clifford Higgins, clifford.higgins@oregonmetro.gov

Description:

Metro's transportation-related planning policies and procedures respond to mandates in Title VI of the 1964 Civil Rights Act and related regulations; Section 504 of the 1973 Rehabilitation Act and Title II of the 1990 Americans with Disabilities Act; the federal Executive Order on Environmental Justice; the United States Department of Transportation (USDOT) Order; the Federal Highway Administration (FHWA) Order; Goal 1 of Oregon's Statewide Planning Goals and Guidelines and Metro's organizational values of Respect and Public Service.

Objectives:

- Identify communities and populations that are historically under-represented in decision-making processes using the most current federal census data, supplemented by more granular local information. Examples of supplemental information include Oregon Department of Education data on LEP populations and school lunch participation, HUD data on Section 8 housing voucher distribution, local real estate value data, job/income distribution data from the Bureau of Labor Statistics, Portland State University's Population Research Center analysis, and interviews with leaders of local immigrant groups and other community-based organizations. (ONGOING)
- Engage minority and low-income people in the decision-making processes through (1) relationships with community-based organizations and schools and minority business organizations; (2) promoting minority representation on advisory committees that have seats for community members; (3) development of outreach and engagement activities that minimize barriers to participation; and (4) improving communication techniques to increase the accessibility of information. (ONGOING)
- Assess – and improve methods to assess – the outcomes of regional transportation plans and programs on historically marginalized populations in order to improve decisions, inform communities and increase equity outcomes. (ONGOING)
- Implement strategies to achieve equity goals that were adopted as a goal and value of the RTP and as a criterion for evaluating projects to include in the Metropolitan Transportation Improvement Plan (MTIP). (ONGOING)

Previous Work:

- Continued updating and distributing internal language assistance guide to help staff take advantage of resources to provide access for English language learners; continued annual training for staff on how to use telephonic interpretation service to provide language assistance for incoming calls and at Metro outreach events.
- Continued the language hub on the Metro website to communicate services and civil rights in 13 non-English languages.
- Updated Metro's Title VI Plan and submitted to the Oregon Department of Transportation. The plan was approved in July, 2017 and will be updated by July, 2020.
- Submitted a Title VI Compliance Report covering 12 months of activity through June 30, 2017 to the Oregon Department of Transportation. (expected November 2017)

I. GENERAL MPO TRANSPORTATION PLANNING

- Used email and Metro News posts to keep environmental justice stakeholders informed of Regional Transportation Plan update and Metropolitan Transportation Improvement Program comment opportunities and decision-making milestones.
- Coordinated with the development of the Metro equity strategy; began coordination on developing a Planning and Development departmental equity plan aligned with the Metro equity strategy.
- Conducted specific engagement to populations of color, limited English proficiency populations and low-income populations for the Southwest Corridor Plan draft Environmental Impact Statement process (NEPA). (DEIS expected completion Fourth Quarter 2017-18)
- Worked with local jurisdictions and environmental justice leaders on methodology for a Transportation Equity Analysis for future benefits, burdens and disparate impact analyses for Regional Transportation Plan updates and future Metropolitan Transportation Improvement Programs to inform decision-makers, inform communities and identify any need to avoid, minimize or mitigate impacts to historically marginalized communities prior to final adoption.
- Worked with environmental justice leaders and communities of concern to assess transportation needs that might be addressed through policy updates and project prioritization in the 2018 Regional Transportation Plan.
- Conducted Transportation Equity Analysis for future benefits, burdens and disparate impact analyses for the Metropolitan Transportation Improvement Program and 2018 Regional Transportation Plan. (Regional Transportation Plan analysis expected completion Fourth Quarter 2017-18)
- LEP Plan implementation: completed tasks identified in the LEP Plan through June 2018, which – for this fiscal year – consisted primarily of monitoring, assessing and improving internal processes for the program through efforts to engage English language learners.
- Developed Americans with Disabilities Act facility accessibility self-evaluation and action plan for Metro Regional Center. (Expected completion Fourth Quarter 2017-18.
- Updated web and report civil rights non-discrimination notice to specifically underscore compliance with Title II of the 1990 Americans with Disabilities Act.

Methodology

Metro's work to ensure compliance with Title VI, ADA and Environmental Justice regulations and statutes includes implementing: Metro's Title VI Plan for ODOT consistent with FHWA guidelines, its Title VI Program and LEP Plan for FTA, annual and quarterly UPWP reporting to both ODOT and FTA; implementing outreach strategies that help EJ populations overcome barriers to participation; demographic data collection and mapping; assessing outcomes of plans and programs on historically marginalized communities; and trainings provided to staff on Title VI compliance requirements and EJ outreach best practices. Program work on compliance is found across many areas of transportation planning: developing the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP); corridor planning projects that follow NEPA regulations and in the Regional Travel Options program, which conducts federally-funded outreach that promotes non-automobile transportation options. In 2012, Metro created a new public engagement review process, designed to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices. One of the three criteria for selection of members of the Public Engagement Review Committee, an advisory committee to the Metro Council, is ability to represent diverse communities in the region. Other components of the

public engagement review process that will contribute to more inclusive engagement and accountability include an annual public survey, meetings of public involvement staff from around the region to address best practices, an annual community summit to gather input on priorities and engagement techniques, and an annual report.

Metro addresses compliance agency-wide as well as within transportation planning functions and program-by-program. A key way that Metro complies across the agency is with implementation of its Diversity Action Plan, updated and adopted by the Metro Council in May 2017. The plan identifies goals, strategies and actions to increase diversity and cultural competence at Metro in four key areas: internal awareness and diversity sensitivity, employee recruitment and retention, committee membership and public involvement, and procurement. Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion was adopted by the Metro Council in June 2016 and identifies goals and actions under five goals: Metro convenes and supports regional partners to advance racial equity; Metro meaningfully engages communities of color; Metro hires, trains and promotes a racially diverse workforce; Metro creates safe and welcoming services, programs and destinations; and Metro's resource allocation advances racial equity. Through the 2017-18 fiscal year, four departments are developing racial equity plans to reach the goals of the racial equity strategy: Planning and Development, Parks and Nature, Property and Environmental Services and the Oregon Zoo.

Entities Responsible for Activity:

- Metro – Lead Agency
- Oregon Department of Transportation – Cooperate/Collaborate
- TriMet – Cooperate/Collaborate
- Local jurisdictions – Cooperate/Collaborate

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

- Submit a Title VI Compliance Report covering 12 months of activity through June 30, 2018 to the Oregon Department of Transportation. (First Quarter 2018-19)
- Annually update staff language resource list to provide in-house translation services as needed for multiple languages. (Ongoing)
- Updated the Limited English Proficiency Factor One (of the Department of Justice Four Factor Analysis) data and analysis for a 2018-19 Limited English Proficiency Plan and Implementation Plan update. (Third Quarter 2018-19)
- LEP Plan implementation: complete all tasks identified in the LEP Plan through June 2018, which – for this fiscal year – consists primarily of monitoring, assessing and improving internal processes for the program through efforts to engage English language learners. (Ongoing)
- Planning and Development departmental equity plan: complete tasks identified in the equity plan through June 2019. (Ongoing)
- Planning and Development departmental equity plan: complete tasks identified in the equity plan through June 2019. (Ongoing once departmental equity plan completed)
- Research available datasets for mapping populations of people with disabilities. (Third Quarter 2018-19)
- Research spatial demographic trends for communities of color and communities with low income compared to 2010 decennial census to inform next MTIP cycle. (Third Quarter 2018-19)

- English language learner and communities with low income analysis at the local jurisdictional (municipal) level to provide to those jurisdictions without capacity for their own analysis. (Fourth Quarter 2018-19)

Schedule for Completing Activities:

Please refer to schedule information provided in the Major Project Deliverables/Milestones section.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$62,182	0.45
2012-13	\$53,940	0.45
2013-14	\$122,644	0.50
2014-15	\$50,191	0.41
2015-16	\$113,658	0.7
2016-17	\$124,561	0.7

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 103,952	PL	\$ 146,403
Interfund Transfers	\$ 42,451		
TOTAL \$	146,403	TOTAL \$	146,403

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.75
TOTAL	0.75

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 108,035	PL	\$ 156,544
Interfund Transfers	\$ 48,508		
TOTAL \$	156,544	TOTAL \$	156,544

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.76
TOTAL	0.76

Public involvement

Staff contact: Clifford Higgins, clifford.higgins@oregonmetro.gov

Description:

Metro is committed to transparency and access to decisions, services and information for everyone throughout the region. Metro strives to be responsive to the people of the region, provide clear and concise informational materials and address the ideas and concerns raised by the community. Public engagement activities for decision-making processes are documented and given full consideration.

Objectives:

- Promote participation, based on public involvement opportunities, of individuals and of community, business and special interest groups. (ONGOING)
- Provide communications to encourage public participation in Metro processes that are understandable, timely and broadly distributed. (ONGOING)
- Provide the public with opportunities to be involved early in the process of policy development, planning and projects. (ONGOING)
- Comply with federal and state laws, regulations and guidance regarding public participation and notice of comment opportunities in transportation and land use decisions. (ONGOING)

Previous Work:

- Continued the Public Engagement Review Committee and public engagement review process to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices.
- Conducted public engagement for Southwest Corridor Plan Draft Environmental Impact Statement. (expected completion Fourth Quarter 2017-18)
- Conducted public engagement Powell-Division Transit and Development Project up to NEPA process.
- Continued outreach and public comment opportunities the 2018 Regional Transportation Plan update. (Ongoing)
- Produced the annual public involvement report for Metro, reviewing and evaluating public involvement processes across the agency. (expected completion Second Quarter 2017-18)
- Produced three Regional Snapshots in fiscal year 2017-18 to better communicate issues and opportunities for the region in the areas of transportation, jobs and housing. (expected completion Fourth Quarter 2017-18)
- Updated the agency's Public Engagement Guide. (expected completion Second Quarter 2017-18)

Methodology:

Metro' public involvement practices follow the agency's Public Engagement Guide (formerly the Public Involvement Policy for Transportation Planning). Metro's public involvement policies establish consistent procedures to ensure all people have reasonable opportunities to be engaged in planning and policy process. Procedures include outreach to communities underserved by transportation

projects, public notices and opportunities for comment, which are addressed more specifically in this report's Title VI and Environmental Justice section. The policies also include nondiscrimination standards that Metro, its subcontractors and all local governments must meet when developing or implementing projects that receive funding through Metro. When appropriate, Metro follows specific federal and state direction, such as those associated with the National Environmental Policy Act and Oregon Department of Land Conservation and Development rules, on engagement and notice and comment practices.

In 2012, Metro created a new public engagement review process, designed to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices. Other components of the public engagement review process which will contribute to more inclusive engagement and accountability include an annual public survey, meetings of public involvement staff from around the region to address best practices, an annual community summit to gather input on priorities and engagement techniques, and an annual report.

In 2015, Metro introduced its Regional Snapshot series, bringing new online communications tools to expressing the issues and opportunities for the region in the areas of transportation, jobs and housing. These snapshots combine data infographics, personal stories and reports of actions being taken within the region and around the country to better connect residents to planning issues and solutions that show promise at the local or regional level.

Entities Responsible for Activity:

- Metro – Lead Agency
- Oregon Department of Transportation – Cooperate/Collaborate
- TriMet – Cooperate/Collaborate
- Local jurisdictions—Cooperate/Collaborate

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Convene the annual community summit, seeking input from the public to help shape public involvement processes. (Annual event)
- Produce the annual public involvement report for Metro, reviewing and evaluating public involvement processes across the agency. (Annual activity)
- Continue outreach and public comment opportunities the 2018 Regional Transportation Plan update. (Through Second Quarter 2018-19)
- Conduct outreach and public comment opportunities for amendments to the Metropolitan Transportation Improvement Program (As needed)
- Produce three Regional Snapshots in fiscal year 2018-19 to better communicate issues and opportunities for the region in the areas of transportation, jobs and housing.

Schedule for Completing Activities:

Please refer to schedule information provided in the Major Project Deliverables/Milestones section.

Funding History:

Public Involvement is spread throughout other project budgets. Please refer to the MTIP, Corridor Planning, Title VI MPO Management & Services budget summaries.

Transportation System Management and Operations - Regional Mobility Program

Staff contact: Caleb Winter, caleb.winter@oregonmetro.gov

Description

Regional Mobility is one of two program areas under the broad policy heading of Transportation System Management and Operations (TSMO) – the other is the Regional Travel Options program. Together these two programs advance TSMO strategies by coordinating the development, implementation and performance monitoring of regional demand and system management strategies that relieve congestion, optimize infrastructure investments, promote travel options and reduce greenhouse gas emissions. Both the Regional Mobility Program and Regional Travel Options programs are key components of Metro’s Congestion Management Process (CMP). Many CMP activities related to performance measurement and monitoring are covered as part of the Regional Mobility Program. The TSMO Program works in collaboration with ODOT Region 1 Planning for Operations (see separate entry in UPWP).

Objectives:

- Coordinate Regional Mobility strategies and investments with the Regional Transportation Plan (RTP), corridor refinement plans, and local Transportation System Plans (TSP) to ensure consideration and integration of TSMO strategies as directed by the Regional Transportation Functional Plan.
- Implement the region’s Congestion Management Process (CMP) by enhancing performance data and reporting capabilities and by continuing to advance demand and system management solutions that address congested travel.
- Coordinate allocation of regional flexible funds for TSMO project priorities, as identified by the Regional TSMO Strategy.
- Coordinate and collaborate with ODOT Region 1 Planning for Operations activities (see separate UPWP entry)
- Guide investments in ITS communications infrastructure based on the Communications Master Plan, regional resources and regional partnerships.
- Update the region’s ITS Architecture Plan for consistency with the National and State ITS Architecture Plans, and with the Regional TSMO Strategy update (see separate UPWP entry).
- Continue to strengthen the Transportation Policy Alternatives Committee’s (TPAC) institutional capacity regarding TSMO especially in the area of joint demand and system management policy and funding decisions (e.g., Mobility on Demand and Smart City innovations).
- Support regional understanding of, and opportunities for connected and automated vehicles.
- Serve as a regional liaison to advance research, education and training on transportation management and operation issues relevant to the region.
- Maintain ongoing communication with counterparts at Federal Highway Administration (FHWA) and Oregon Department of Transportation (ODOT) regarding the CMP implementation as it relates to TSMO.

Previous Work:

In FY 2017-18, the Regional Mobility Program:

- Administered TSMO projects sub-allocated in the 2012-15 MTIP and 2016-2018 MTIP.
- Participated in project coordination meetings.
- Continued TSMO related work from the Congestion Management Process (CMP).
- Shared and began trained regional partners on the regional ITS Architecture.
- Coordinated with agency leads on fiber optic and data communications based on the regional Communications Master Plan.
- Coordinated and participated in monthly TransPort meetings.
- Coordinated TSMO-related professional development and training opportunities.
- Held connected and automated vehicle presentations and discussions at TransPort to begin developing a regional vision in advance of a TSMO Strategy update.
- Provided input to transit signal priority planning region-wide, for Powell/Division and Southwest Corridor high capacity transit projects.
- Participated in the Traffic Incident Management (TIM) Coalition for the Portland area.
- Participated at federal level: hosted FHWA Operations workshop on the lessons learned from Integrated Corridor Management deployments around the country; participated in an MPO peer exchange on regional TSMO.

Methodology:

With the intent of supporting TSMO investments and activities in the Portland metropolitan region, the Regional Mobility program encompasses three activity areas that include regional policy development and support, MTIP grant management and system performance management.

Development and Support

The Regional Mobility program serves as the liaison for TSMO policy development and implementation. It facilitates the sharing of best practices with and among partner agencies. The program provides leadership on the update of the Regional Intelligent Transportation System (ITS) Architecture in order to comply with the FHWA rule that requires federally funded transportation projects to be in compliance with the National ITS Architecture. It will also guide implementation of the region's ITS communications network under the Communications Master Plan. The program will work with the Regional Travel Options program to coordinate an ad hoc regional transportation management policy and funding subcommittee of TPAC as needed. It will continue to seek and support opportunities for research, education, and training on TSMO.

MTIP Grant Management

The Regional Mobility Program manages the sub-allocation of MTIP funding dedicated to TSMO. The TSMO program coordinates projects that were prioritized for a sub-allocation of federal funds for 2016-2018 and 2018-2021, consistent with the Regional TSMO program plan and strategy. The program will continue to coordinate and manage the allocation of TSMO-designated regional flexible funds to partner agencies. It will provide support for applying systems engineering to regionally-funded ITS projects.

Congestion Management Process

The Regional Mobility program supports the federal mandates to maintain a CMP and promote TSMO, including intelligent transportation systems (ITS). The program will implement actions identified in the Arterial Performance Management Regional Concept of Traffic Operations (RCTO) to advance the region’s performance measurement capabilities on arterial streets. CMP performance monitoring will continue (e.g., Regional Mobility Corridor Atlas) in order to support development of the RTP, local TSPs and MTIP programming. The program will continue to enhance PORTAL, a regional archived data user service managed by Portland State University. PORTAL will continue to expand the collection, archiving, and uses of multimodal performance data in a way that will enhance the region’s ability to diagnose and address congestion and support multimodal operations.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Manage projects funded with FY2016-2018 MTIP to advance priority projects as identified in the 2010-2020 Regional TSMO Plan (ONGOING)
- Conduct project selection process for FY 2018-2021 MTIP TSMO Program funds.
- Provide strategic and collaborative program management including coordination of activities for TransPort, ODOT Region 1 Planning for Operations (see separate UPWP entry), PORTAL Technical Advisory Committee, ITS Architecture, ITS Network Management Team, Traffic Incident Management (TIM) Coalition, Central Signal System Users Group, Cooperative Telecommunications Infrastructure Committee and other regional TSMO-related forums. (ONGOING)
- Support implementation of the Arterial Performance Measure Regional Concept of Operations (RCTO) to expand real-time, multimodal traffic surveillance and performance data collection capabilities including signal controller software enhancements. (ONGOING)
- Participate in the regional project led by City of Portland to upgrade or replace the Regional Central Signal System and form partnerships as well as next generation Transit Signal Systems. (ONGOING)
- Identify and pursue opportunities to implement the Emerging Technology Strategy, which includes policies to develop new regional data sources and management systems in preparation for automated and connected vehicles, through the TSMO program.
- Continue TSMO Strategy Update by exploring topics including equity, safety, resiliency, connected vehicles, automated vehicles, vehicle-to-X communications, transit signal priority, freight signal priority, mobility as a service/mobility on demand (e.g., public-private partnerships), performance measures, big data analytics and asset management (For more info, see separate UPWP entry on TSMO Strategy update).
- I-84 Multimodal Integrated Corridor Management (ICM) Deployment Plan (See separate UPWP entry)
- Support TSMO related elements of the Congestion Management Process (ONGOING)

Entities Responsible for TSMO Activity

Policymaking

- Metro Council
- Metro (Lead Agency)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)

I. GENERAL MPO TRANSPORTATION PLANNING

- TransPort (Subcommittee of TPAC)

Cooperation, Collaboration & Funding Recipients

- TransPort subcommittees (includes PORTAL Technical Advisory Committee, ITS Architecture Subcommittee, ITS Network Management Team, Traffic Incident Management Coalition.
- Transportation Research and Education Center (TREC)/ Portland State University Federal Highway Administration (FHWA) Federal Transit Administration (FTA), US DOT ITS Joint Program Office
- Oregon Department of Transportation (ODOT), TriMet, Port of Portland, Counties of Clackamas, Multnomah & Washington, Cities of Beaverton, Gresham, Hillsboro, Portland, Lake Oswego, Tigard, Wilsonville, SW Regional Transportation Council, C-Tran, Washington State Department of Transportation

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major project deliverables/milestones* section.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$192,225	1.13
2012-13	\$60,000	0.76
2013-14	\$69,963	1.49
2014-15	\$281,805	1.55
2015-16	\$193,735	0.9
2016-17	\$114,687	0.55

FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services	\$	46,501
Interfund Transfers	\$	18,989
Materials and Services	\$	2,500

Resources:

TSMO STBG	\$	60,769
Metro	\$	7,220

TOTAL \$	67,990	TOTAL	67,990	\$67,990
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Full-Time Equivalent Staffing

Regular Full-Time FTE	0.318
TOTAL	0.318

FY 2018-19 Cost and Funding Sources:

Requirements:

Personal Services	\$	59,254
Interfund Transfers	\$	25,162
Materials and Services	\$	2,500
TOTAL \$		86,916

Resources:

TSMO – STBG	\$	69,010
STBG	\$	8,979
Metro	\$	8,926
TOTAL \$		86,916

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.418
TOTAL	0.418

Transportation System Management and Operations - Regional Travel Options (RTO)

Staff Contact: Dan Kaempff; daniel.kaempff@oregonmetro.gov

Description:

Regional Travel Options is one of two program areas under the broad policy heading of Transportation System Management and Operations (TSMO) – the other is the Regional Mobility program. Together these two programs advance TSMO strategies by coordinating the development, implementation and performance monitoring of regional demand and system management strategies that relieve congestion, optimize infrastructure investments, promote travel options, and reduce greenhouse gas emissions. Both the Regional Mobility Program and Regional Travel Options programs are key components of Metro’s Congestion Management Process (CMP).

Objectives:

- Implement the 2018 RTO Strategy. (ONGOING)
- Support regional coordination and collaboration around travel options education and outreach. Convene working group of partners. Provide support for partner agency education and outreach activities. Lead development of regional education, outreach and awareness initiatives. Facilitate Portland-region implementation of ODOT transportation options education and outreach initiatives. (ONGOING)
- Develop and implement a funding allocation methodology that reflects and supports the goals and objectives of the 2018 RTO Strategy. Develop criteria that support the Regional Transportation Plan and other regional goals, focusing on achieving outcomes that improve equity, the environment, and the economy. Consider elderly, disabled, low income, minority and other underserved populations in the grant making process. Consider the impacts on public health in the grant making process. (ONGOING)
- Administer and monitor funding allocated or awarded to local governments and non-government organizations. Work with funding recipients to provide technical assistance in the areas of budget and fiscal management to ensure funds are spent in compliance with federal regulations.
- Continued implementation of an evaluation strategy that measures the outputs and outcomes of all projects and programs supported with RTO funds, to ensure alignment with federal and regional goals related to reducing vehicle miles traveled and improving air quality. (ONGOING)
- Continued implementation of the regional commuter program with a focus on new rail transit investments, multi-use trail investments and improved coordination of multi-agency efforts. (ONGOING)
- Continued administration of ride matching services to region, including participation in multi-state online ride matching system. (ONGOING)

Previous Work:

In FY 17-18 quarters 1 and 2, the Regional Travel Options Program:

- Managed 18 grant projects, totaling \$2.1 million awarded through the 2017-19 RTO grant solicitation process. Enhanced coordination between regional partners engaged in employer outreach activities. Provided technical assistance and materials to support partners work.

- Managed Drive Less Connect (DLC) for the Portland region. DLC is a multi-state ride matching system covering Idaho, Oregon and Washington
- Supported regional collaborative marketing initiatives to promote travel options and safety, including “Be Seen. Be Safe.”, “Transit Is,” “Bike More Challenge,” “Bike Month,” “Drive Less Challenge,” and others.
- Conducted the 2013-2016 RTO evaluation that will be broken into reports by key topics: Commuters, Neighborhoods, Traveler Information & Services, Health/Active Transportation and Administration. These reports provided findings to aid in the RTO Strategy update.

Methodology:

The RTO program implements regional policies to reduce drive-alone auto trips and personal vehicle miles of travel and to increase use of travel options. The program improves mobility and reduces pollution by carrying out the TDM components of the TSMO strategy outlined in the 2014 Regional Transportation Plan (RTP). The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours. Specific RTO strategies encompass promoting transit, ridesharing, cycling, walking, and telecommuting.

Policies at the Federal, state and regional level emphasize system management as a cost-effective solution to expanding the transportation system. The RTO program supports system management strategies that reduce demand on the transportation system. RTO strategies relieve congestion and support movement of freight by reducing drive-alone auto trips.

RTO and partners will measure projects along a triple-bottom line framework with performance indicated in terms of economic, social and environmental benefits. RTO developed a multiple account evaluation framework to better capture the range of outcomes delivered by RTO grant partners and to align projects with RTP performance measures. In keeping with the RTP mode share targets, a primary RTO performance measure is shifting mode share to approximately a 50% non-drive-alone trips by 2035.

Partners responsible for RTO program planning and delivery include:

- Metro Council – Policy making
- Joint Policy Advisory Committee on Transportation (JPACT) – Policy making
- Transportation Policy Alternatives Committee (TPAC) – Policy making
- Transportation Research and Education Center (TREC) – Cooperate/Collaborate
- Oregon Transportation Commission (OTC) – Cooperate/Collaborate
- Federal Highway Administration (FHWA) – Cooperate/Collaborate
- Federal Transit Administration (FTA) – Cooperate/Collaborate
- Oregon Department of Transportation (ODOT) – Cooperate/Collaborate
- SW Regional Transportation Council – Cooperate/Collaborate
- Washington State Department of Transportation – Cooperate/Collaborate
- Beaverton School District – Grant Recipient
- City of Gresham – Grant Recipient
- City of Lake Oswego – Grant Recipient
- City of Milwaukie – Grant Recipient
- City of Portland – Grant Recipient
- City of Tigard – Grant Recipient
- City of Vancouver – Cooperate/Collaborate
- City of Wilsonville/Wilsonville SMART – Grant Recipient

- Clackamas Community College – Grant Recipient
- Clackamas County – Grant Recipient
- Community Cycling Center – Grant Recipient
- C-TRAN – Cooperate/Collaborate
- Explore Washington Park – Grant Recipient
- Go Lloyd – Cooperate/Collaborate
- Gresham Area Chamber of Commerce – Grant Recipient
- Hillsboro Parks and Recreation – Grant Recipient
- Multnomah County – Grant Recipient
- National Safe Routes to School Alliance – Grant Recipient
- Oregon Walks – Grant Recipient
- Portland Community College – Grant Recipient
- Portland Public Schools – Grant Recipient
- Ride Connection – Grant Recipient
- The Street Trust – Grant Recipient
- TriMet – Grant Recipient, Cooperate/Collaborate
- Washington County – Grant Recipient, Cooperate/Collaborate
- West Columbia Gorge Chamber of Commerce – Grant Recipient
- Verde – Cooperate/Collaborate
- Westside Transportation Alliance TMA – Grant Recipient

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

Develop and update tools to support coordination of RTO partners' education and outreach activities including a marketing plan, calendar and shared marketing materials. (ONGOING)

- Manage the Regional Travel Options sponsorship program, which supports community and regional travel options partners through events and limited duration community outreach initiatives that promote and educate the public about travel options. (ONGOING)
- Distribute the Bike There! map through area retail outlets, distribute free copies of the flatmap to employment sites to encourage and assist employees in finding their route to work. (ONGOING)
- Manage and support Drive Less Connect ride matching database. (ONGOING)
- Monitor and report progress on programs and projects carried out by Metro, TriMet, SMART, and RTO grant recipients, including evaluations and surveys. (ONGOING)
- Coordinate with Mobility on Demand (MOD) partners, real-time traveler information partners to advance Active Transportation Demand Management (ATDM) strategies and increase use of travel options.
- Coordinate with City of Vancouver and C-TRAN on bi-state commute programs. (ONGOING)
- Implement and manage FY 17-19 Regional Travel Options grants and past grants that are still active. (ONGOING)
- Based on policy direction from the 2018 RTO Strategy, update and modify RTO funding allocation process, criteria, methodology.
- Begin preparations for 19-21 RTO funding allocation process.

Schedule for Completing Activities:

Ongoing – Grant projects awarded through 2017-19 funding allocation continue
 Fall/Winter 2018 – Solicitation of 2019-21 grant proposals; award of grants
 Spring 2019 – Refinement of grant project scopes of work; development of grant agreements between Metro and grant recipients for projects scheduled to begin July 1, 2019
 June 30, 2019 – 2017-19 grant projects due to be completed. Final reports are due in July 2019

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$2,041,526	6.2
2012-13	\$1,791,267	6.46
2013-14	\$2,040,294	5.66
2014-15	\$2,286,261	5.35
2015-16	\$2,280,818	4.25
2016-17	\$2,255,371	3.75

FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services \$ 534,858
 Interfund Transfers \$ 219,759
 Materials and Services \$ 1,544,070

Resources:

FTA - STBG \$ 1,969,215
 ODOT-FHWA-STBG \$ 225,000
 Metro \$ 104,472

TOTAL	\$ 2,298,686	TOTAL	\$ 2,298,686
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Full-Time Equivalent Staffing

Regular Full-Time FTE 4.282

TOTAL	4.282
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I. GENERAL MPO TRANSPORTATION PLANNING

FY 2018-19 Cost and Funding Sources:

Requirements:

Personal Services	\$	600,777
Interfund Transfers	\$	257,530
Materials and Services	\$	2,247,394

Resources:

FTA - STBG	\$	2,802,835
ODOT – FHWA - STBG	\$	172,219
Metro	\$	130,646

TOTAL \$		3,105,701	TOTAL \$		3,105,701
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Full-Time Equivalent Staffing

Regular Full-Time FTE	4.932
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TOTAL	4.932
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Regional Freight Program

Contact: Tim Collins at tim.collins@oregonmetro.gov

Description:

The safe and efficient movement of freight is critical to the region's continued economic health. The Regional Freight Program manages updates to, and implementation of, multimodal freight elements in the Regional Transportation Plan (RTP) and provides guidance to affected municipalities in the accommodation of freight movement on the regional transportation system. The program supports coordination with local, regional, state, and federal plans to ensure consistency in approach to freight-related needs and issues across the region. It ensures that prioritized freight requests are competitively considered within federal, state, and regional funding programs. Ongoing freight data collection, analysis, education, and stakeholder coordination are also key elements of Metro's freight planning program.

Metro's freight planning program also coordinates with the updates for the Oregon Freight Plan. Metro's coordination activities include participation in the Oregon Freight Advisory Committee (OFAC), and Portland Freight Committee (PFC). To facilitate USDOT requirements under the FAST Act, Metro helped provide information on the locations of freight intermodal connectors in the region, and the urban freight roadways and highways to add to the National Multimodal Freight Network.

Objectives:

Policy

- Engage with the Oregon Transportation Plan, Regional Transportation Plan (RTP), corridor refinement plans, and local Transportation System Plans (TSP) to ensure consideration and integration of freight policies and strategies as directed by the Regional Transportation Functional Plan.
- Work with state, regional and local agencies and private interests to implement the Regional Freight Strategy, including the action items identified in Chapter 9, as well as advancement of key multimodal freight investment priorities, securing appropriate private matching funds, and ensuring regional investments are competitively considered under state freight funding programs.
- Update regional freight vision and policies for the 2018 Regional Transportation Plan.
- Track industrial land use planning efforts to ensure that current and future freight movement needs are addressed.
- Continue to work with Oregon Freight Advisory Committee to identify statewide freight project needs and seek support for funding of priorities.
- Participate in the Portland Freight Committee and the implementation of the Portland Freight Master Plan, meeting FAST Act provisions for coordination of freight movement.
- Maintain a Regional Freight Program outreach component including web page, presentations, and informational materials.

Projects

- Support and collaborate on enhancements to freight analysis tools including the update of the Commodity Flow Forecast, Metro's truck module of the travel forecast model, Metro's Behavior Based Freight Model, and the Portland Oregon Regional Transportation Archive Listing (PORTAL).
- Collaborate with the Port of Portland and other stakeholders, to support the region's export initiative and leverage it into a broader economic development initiative that maximizes returns in the region. Consider export strategies as a key driver for investments affecting the regional freight network, seek available funding and coordinate relevant initiatives or analysis.
- Track regional projects with significant implications for freight movement.

Previous Work:

In FY 2017-18, major freight program tasks completed included:

- Continued to participate in monthly Portland Freight Committee and quarterly State Oregon Freight Advisory Committee.
- Participated in the Oregon Freight Intermodal Connector System (OFICS) Study, Technical Advisory Committee.
- Under the FAST Act, provided recommendations to USDOT, and developed with ODOT an expanded Metro region-wide network for the Interim National Multimodal Freight Network.
- Provided advice and modeling expertise to the City of Portland and their consultant for the Regional Over-Dimensional Truck Route Study.
- Participated in and provided over-site to the Project Management Team (PMT), for completion of the Regional Over-Dimensional Truck Route Study in February of 2017.
- Participated in the proposals of the Regional Flexible Fund Allocations (RFFA) for current and future regional freight programs and studies.

Methodology:

The regional freight program is part of Metro's MPO function, and the Regional Freight Plan was adopted in June 2010 as part of the Regional Transportation Plan. The focus of the work program for FY 2018-19 will continue to be on coordination with freight stakeholders, local jurisdictions and partners; and enhancing data collection and analysis tools. Specific major activities will include finalizing the Regional Freight Strategy as part of the 2018 Regional Transportation Plan. With the input of the Regional Freight Work Group, and policy guidance from TPAC and JPACT, the plan will be updated as the Regional Freight Strategy. We will also continue to seek additional funding and partnership opportunities which will allow us to further implement the regional freight strategy and stimulate jobs and economic activity.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

- Update Freight Element of 2018 RTP (December 2018)
- Finalize the Regional Freight Strategy (October 2018) with the following work products:
 1. Updated economic figures and commodity flow data
 2. New freight measures that inform near- and long-term investment priorities
 3. Updated regional Freight Network map
 4. New sections on regional freight funding and the federal FAST Act and FASTLANE grants
 5. New sections on the new freight model and technology in freight transportation
- Develop and model new RTP system performance measures and monitoring measures for freight (2018 - 2019).
- Collaborate with Port of Portland and other business entities on expanded export and related industrial economic development activities. (ON-GOING)
- Continue to participate in monthly Portland Freight Committee and other local projects (ON-GOING)
- Participate in quarterly State Oregon Freight Advisory Committee. (ON-GOING).

Entity/ties Responsible for Activity:

- Metro Council (Lead Agency)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)
- Regional Freight Work Group (input and coordination of the 2018 Regional Transportation Plan and Regional Freight Strategy)
- Cities and counties within the region including Clark County, Washington
- Federal Highway Administration (FHWA)
- Oregon Department of Transportation (ODOT)
- Washington State Department of Transportation (WSDOT) (for certain coordination)
- Ports of Portland and Vancouver
- Businesses, including freight shippers and carriers, distribution companies, manufacturers, retailers and commercial firms
- Oregon Trucking Association and other business associations including the Westside Economic Alliance, East Metro Economic Alliance, the Columbia Corridor Association, and the Portland Business Alliance
- Metro area residents and neighborhood associations

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project deliverables/milestones* section.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$146,142	0.795
2012-13	229,341	1.32
2013-14	\$91,385	0.51
2014-15	\$192,713	0.95
2015-16	\$108,586	0.53
2016-17	\$123,532	0.55

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 69,015	STBG	\$ 87,216
Interfund Transfers	\$ 28,183	Metro	\$ 9,982
TOTAL	\$ 97,198	TOTAL	\$ 97,198

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.475
TOTAL	0.475

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 38,520	STBG	\$ 49,242
Interfund Transfers	\$ 16,358	Metro	\$ 5,636
TOTAL	\$ 54,878	TOTAL	\$ 54,878

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.255
TOTAL	0.255

Data Management, Data Visualization, and Performance Measurement

Staff Contact: Karen Scott-Lowthian, karen.scott-lowthian@oregonmetro.gov

Description:

Metro’s Research Center (RC) department includes the Data Resource Center (DRC) which provides Metro and the region with spatial and other data services including: data acquisition, aggregation, and standardization; data storage systems, software applications, and system analysis; and analytic products that visualize data to support decision-making, performance measurement, and other purposes. DRC performs the following primary activities in close cooperation with staff in Metro’s Planning & Development (P&D) department:

- Data analysis and visualization. DRC computes transportation plan evaluation measures, performs land development trend analyses, and applies many other analytics that turn data into useful information.
- Data system and data-driven application development. DRC designs, implements, and maintains data systems and software applications that let end users acquire, store, analyze, and retrieve data for Metro’s federal and other programs.
- Data development: DRC collates maintains a collection of more than 150 spatial and related datasets which form the foundation for providing services to the Research Center’s partners. The data repository, known as the Regional Land Information System (RLIS), supports land use and transportation planning and almost every other Metro program.
- Performance Measurement: DRC uses its own and other data sources to produce visualizations for monitoring the performance of the regional transportation system, monitoring the region’s land use, measuring transportation plan outcomes, assessing growth management planning outcomes, and measuring other Metro programs’ progress toward regional goals. Key elements of performance measurement for the UPWP include:
 - Transportation System Monitoring: The DRC collects, manages, and analyzes a wide array of data regarding transportation performance. This work informs transport and land use planning, MTIP activity, and Metro policy development. Transport monitoring in turn has several dimensions, including but not limited to:
 - Roadway performance
 - Transit performance
 - Bicycle (and, eventually, pedestrian) system performance
 - Safety/Crashes
 - Performance of and data streams from emerging technologies including CV/AV, transport network companies, etc.
 - Performance measures required under MAP-21
 - Land Development Monitoring System (LDMS): similarly to transportation monitoring, DRC data and analytics inform Metro’s growth management and housing programs.
- *Ensuring compliance with federal requirements:* DRC staff work together with P&D to craft

data and information products that comply with federal and state regulations.

- *Advanced analytic research*: DRC carries out, as part of overall RC efforts, innovative research to enhance data acquisition, data processing, and analytic methods in ways that improve Metro's ability to conduct its growth planning, transport planning, and other functions.

Objectives:

The primary DRC objective is to ***provide a data-driven and valid analytic foundation for decision support, planning support, and program management support*** to Metro and the region. This includes more-detailed objectives that augment and support P&D objectives:

- *Provide performance measurement data and easy access to it* via products and systems that visualize data as useful information supporting land use planning, transportation planning & programming, program management, and other Metro programs and policy goals.
- *Provide foundation data* upon which analytics and other processes can depend for performance measurement, planning, and operational support.
- *Provide land use and transportation data to support Metro's transport and land use forecasting models* (see separate sections describing land use and transport forecasting).
- *Provide decision-support, analytic, and operational-support software applications* by procurement or in-house development.
- *Innovate* to enhance Metro's ability to use data for planning, performance measurement, and decision-making.
- Coordinate with local jurisdictions, state agencies, private entities, and other partners *to ensure efficient data development and data management.*

Previous Work:

- Provided custom mapping and analysis to Metro Planning and Development Department
- Provided custom mapping and analysis to Metro Property and Environmental Services
- Provided custom mapping and analysis to Metro Parks and Nature Department
- Maintained RLIS datasets, providing quarterly updates to subscribers and partners
- Managed contract to acquire regional orthophotography for partners
- Developed and analyzed regional demographic data
- Conducted Limited English Proficiency and Environmental Justice analysis to comply with federal regulations and executive orders.
- Mapped regional employment sites
- Mapped regional vacant lands
- Updated the regional buildable lands analysis in support of the Urban Growth Management program.
- Acquired and combined rental market data from various sources to support the Land Development Monitoring Program and support affordable housing research
- Developed data and methodology to support analysis of redevelopment and infill potential. Prepared datasets of observed information to assist in the validation of Metro's land use forecast model (i.e., MetroScope)
- Updated regional bicycle network data
- Updated trail network and trail usage data
- Provided mapping and analysis to visualize crash incident data
- Updated the database and server infrastructure to more efficiently manage and deliver data
- Established a web site that summarizes Daily VMT and Daily VMT per capita, transit, and

population data for the Portland Federal-Aid Urban Area as well as the Metropolitan Statistical Area

- Compiled TriMet patronage and new fare structure information
- Collected parking cost information for key areas within the Portland Central Business District (CBD) and the Lloyd Area
- Researched gasoline prices per gallon for the Portland Area, Oregon, the West Coast, and the U.S., and prices per barrel of oil nationally
- Reviewed and commented on key documents that pertain to comparisons of national system performance (e.g., Texas Transportation Institute – Urban Mobility Report, FHWA – Federal Highway Statistics, FHWA – HPMS Summary Report – National Transit Database
- Provided information to those seeking system performance data (e.g., traffic counts, Daily VMT per capita, transit ridership comparisons of top 50 reporting agencies in U.S. – including Portland)
- Assembled transportation system performance data for inclusion into the next Metro Performance Measures document
- Consolidated and standardized historic traffic count data in centralized database for improved reporting, visualization, and distribution
- Began collecting and compiling traffic count data collection contract with input from local jurisdictions, working to see that cutlines and count locations were not duplicative of other agencies' traffic count collection efforts
- Provided RLIS and ad hoc data to members of the public and private entities through DRC public information support
- Deployed the first part of a web-based system to assist volunteers to collect detailed counts of bikes and pedestrians
- Began exploring the development of common, multi-jurisdictional data repositories to house new data

Methodology:

RC and DRC apply the following methods to achieve the *Data Management, Data Visualization, and Performance Measurement* work element objectives:

- Coordinate and cooperate closely with internal Metro and external partners, especially ODOT & data researchers at PSU, to ensure optimal data acquisition and utilization and to craft analytics that will serve Metro's growth planning, MTIP, and RTP activities
- Maintain robust data system infrastructure, application software "stack," and staff system analysis/coding capability within Metro
- Maintain state-of-the-art software and staff capacity for data analysis and visualization
- Develop and maintain systems using best enterprise practices
- Develop analytic and visualization techniques that are valid, robust, and repeatable
- Integrate data management, visualization, and analysis with the forecasting elements of the UPWP (described elsewhere)
- Monitor developments of and suggest directions for data- and analytic-related policy at the regional, state, and national level
- Stay informed of national and local advanced research, and make contributions to it that could serve others

- Work with other regional jurisdictions and partners to identify common needs and develop common cost-saving solutions
- Design and deploy a web- and mobile-accessible information system providing access to a comprehensive, dynamic view of Metro’s transport, land use, and other performance measures.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Data management & system development
- Supplying MAP-21 performance measures in coordination with Metro Planning & Development department and ODOT
- Develop a comprehensive “MPO data plan” as a part of RC’s overall RLIS data management plan that guides Metro’s acquisition, management, and use of data for growth planning, RTP, MTIP, and other federally-required planning functions. The plan will articulate roles and responsibilities for institutions, individuals, and the variety of data systems necessary for success.
- Create a workplan to procure or develop a project & financial tracking database system for the MTIP and RTP programs, preferably spatially-enabled and scalable to include regional partners. Resources permitting, begin implementation of the new database.
- Implement and maintain a single regional site for all regional bike and pedestrian counts, as developed with regional agency and academic partners.
- Support the needs of Metro Planning and Development Department, including analytic and cartographic products for the RTP, MTP, RTO, and other efforts described elsewhere in this document (ONGOING)
- Data acquisition: Update the RLIS data repository regularly with elements including but not limited to: (ONGOING)
- Updated regional demographic and socio-economic data (e.g., income, race, ethnicity, age, employment, education)
- Transportation facility location and characteristics for all modes, including street centerlines and attributes, transit, bicycle, and pedestrian infrastructure
- Land Development Monitoring System (LDMS), including taxlot, housing and employment space pricing, building permits, etc.
- Jurisdictional boundaries and annexations
- Coordinate with ODOT and regional partners to improve street centerline data and to ensure that streets data are current, consistent, standardized, and shared with ODOT and other state agencies
- Collect and compile regional system monitoring data (VMT, transit patronage, auto driving and operating costs, parking costs, gasoline costs per gallon, and oil per barrel) (ONGOING)
- Update regional aerial orthophoto and related (e.g. LiDAR) products for Metro and its partners (ONGOING)
- Storage, maintenance, and upkeep of a single site for all regional traffic counts, as developed with regional partners
- Coordination and cooperation
- Conduct standing coordination between RC and P&D on transportation technology topics and policies, and together bring such topics to Metro Council and committees
- Proactively work with academic partners, especially PSU’s PORTAL and National Bike-Pedestrian programs, to enhance their ability to meet Metro’s MPO and other needs
- Coordinate with local jurisdictional agencies to help provide updated regional demographic

data to them to allow for easier demographic analysis around current and planned transportation projects (ONGOING)

- Update strategic plan for data management and sharing to sustain centralized, consistent and cost-effective storage and maintenance of regional data. (ONGOING) should this be ongoing?
- New set of regional auto and vehicle classification count data as part of quarterly RLIS releases (ONGOING)
- Coordinate with other jurisdictions to help implement a federal standard classification for streets which will support ODOT's classifications in TransData/TransGIS. (ONGOING)
- (ONGOING)
- Coordinate regional emergency response entities to maintain a single street centerline data set that can be used by all (ONGOING)
- Collaborate and coordinate with ODOT to support the use of TransData datasets and to ensure that data development efforts are not duplicative. (ONGOING)
- Coordinate with the Active Transportation Program and regional partners to review existing bicycle and pedestrian count protocols and equipment. Develop a comprehensive program to collect and report these data to support multi-modal transportation modeling (ONGOING)
- Expand on web mapping portal and address services for public usage
- Analytic products
- Conduct regional Factor 1 limited English proficiency analysis for Metro's Title VI reporting
- Respond to transportation monitoring data requests (e.g., traffic counts, daily Vehicle Miles of Travel (VMT) per capita) (ONGOING)
- Continue providing ad hoc data, analysis, and visualization services to members of the public and private entities through DRC public information support (ONGOING)
- Creative analytic solutions to ad hoc transportation and land use planning data visualization and performance measurement needs from the Planning & Development and other Metro Departments through innovation activities (ONGOING)
- Provide data, analysis and technical expertise to the Southwest Corridor Equitable Development project
- Provide data and technical expertise to TriMet in the development of a multi-modal trip planning tool
- Provide data, analysis and technical support to the 2018 update of the Regional Transportation Plan
- Support the MTIP effort
- Title VI support:
 - Analyze demographics of citizens with disabilities
 - Trend analysis on status of communities of color and low income communities both for Metro and for local agencies through technical assistance
- Performance measurement
 - Scope and document the requirements and resource needs for a new (dynamic, web-delivered) version of the Mobility Corridors Atlas, Metro's implementation of the Congestion Management Process (CMP) measurement requirements.
 - Continue to support the development and implementation of the regional Economic Value Atlas within the context of the unified Metro performance

I. GENERAL MPO TRANSPORTATION PLANNING

- measurement data system
- Deploy first phase of a centralized, comprehensive web-accessible application providing access to performance measure information. First phase will be comprised of infrastructure build out, data and performance measure identification, and workflows needed for required reporting, and (resources permitting) prototype measures.
- Advanced analytic research
 - In close coordination with P&D, local jurisdictions, ODOT, and academic partners develop and being implementation of a technology strategy for CV/AV/TNCs and other emerging transport technologies to complement the P&D policy work on those topics (as part of the previously-mentioned “MPO data plan”
 - Scope a data and analytic method long-term strategy to ensure that RC data and analytics will be responsive to emerging planning topics for future RTP, MTIP, and RTO cycles

Entities Responsible for Activity:

- Metro planners and analysts
- Local governments
- Businesses
- Citizens

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Milestones* section.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$1,600,932	9.74
2012-13	\$1,530,797	8.91
2014-15	\$1,821,176	9.48
2015-16	\$1,753,816	6.111
2016-17	\$1,615,517	6.13

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 723,570	PL	\$ 158,370
Interfund Transfers	\$ 514,416	ODOT Support	\$ 112,784
Materials and Services	\$ 143,600	TriMet Support	\$ 122,638
		Metro	\$ 782,229
		Other	\$ 205,566
TOTAL \$ 1,381,586		TOTAL \$ 1,381,586	

Full-Time Equivalent Staffing

Regular Full-Time FTE	5.664
TOTAL	5.664

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 831,242	PL	\$ 211,448
Interfund Transfers	\$ 725,145	ODOT Support	\$ 183,490
Materials and Services	\$ 42,000	TriMet Support	\$ 236,582
		Metro	\$ 911,868
		Other Anticipated Funds	\$ 55,000
TOTAL \$ 1,598,387		TOTAL \$ 1,598,387	

Full-Time Equivalent Staffing

Regular Full-Time FTE	6.259
TOTAL	6.259

Economic, Demographic and Land Use Data and Forecasting Maintenance

Staff Contact: Jeff Frkonja, jeff.frkonja@oregonmetro.gov

Description:

The land use analysis team (LUAT), formerly the socio-economic research center (LUAT), is a unit within Metro's Research Center (RC). LUAT provides historical and forecast estimates of economic activity, population, and land use distribution to Metro's transportation, land use, and solid waste management planners. Historic estimates offer benchmark information to help calibrate the travel demand and land use forecast models and provide performance metrics to help planners understand current conditions. LUAT provides forecasts of future economic, population, and land use conditions in various geographies ranging from regional (MSA) to transportation analysis zone (TAZ) level. Forecast periods range from 20 to 50 years into the future. Metro planners use the projections to manage solid waste policy, study transportation corridor needs, formulate regional transportation plans, analyze the economic impacts of potential climate change scenarios, to develop land use planning alternatives. The latter include performance-based growth management and urban / rural reserves studies. At times, local jurisdictions use the forecast products for their own comprehensive plan and system plan updates.

Objectives:

The primary objective of the LUAT unit is to ***provide robust employment, population, and land use projections to regional policy makers***. State regulations and federal guidance inform these activities, which use the best available tools to carry out forecasting efforts. LUAT sees that forecasts are peer reviewed and coordinated with local jurisdictions per state law.

To provide this information LUAT maintains sets of econometric models and supporting tools that produce regional growth projections for economic and demographic data series. RC maintains model inputs and software on an ongoing basis to ensure that the forecast products remain relevant and valid.

RC also makes major updates to land use forecasting tools on a periodic basis and applies tools to planning projects. See Section II chapter entitled "Economic, Demographic and Land Use Data and Forecasting Development Program" for a description of periodic work.

Previous Work:

Survey, Data Acquisition, and Research

- **Census Data**—Metro RC created for internal use a repository of key Census data and advised its local partners on Census activities such as the local update of community addresses (LUCA) process.

Model Maintenance

- **Regional macro-economic model** —RC staff completed modernization (in 2017) of the regional model to a new forecasting software platform supported by the vendor for U.S. macroeconomic forecast. Also during the project, tasks included re-estimating the model

equations with the most current regional population and employment estimates. Prepared additional forecast operation documents to be used with the new model developments. Validated the model and demonstrated good consistency between forecasts and history after revisions and re-benchmarking have been taken into account. Metro convened an independent expert panel of economists and demographers from the Portland region to review and confirm the model and forecast. Outcomes from the expert review panel are to be published as support documentation for the UGR analysis.

- **MetroScope viewer update**— In conjunction with validation and sensitivity, staff has produced and will continue to update and modernize the templates for displaying and explaining model results. Diagnostic and land use statistics are being standardized into common formats so that future validation and sensitivity exercises can be compared temporally and also provide feedback concerning the model’s performance for re-calibration as needed.
- **Land Development Monitoring Program** —in order to properly validate the recent updates to the land use model, staff prepared new data to independently evaluate the land use model’s forecasting performance. Independent and verifiable rental information, land consumption, infill, and redevelopment estimates are needed and being prepared by the DRC. This data is based on observed current information. Plans are underway to maintain the longitudinal analysis to maintain the land development monitoring program.

Methodology:

Survey, Data Acquisition, and Research

- **Market Research**—use consumer surveys to investigate the difference in actual market choices vs. stated preferences (similar to the use of revealed and stated preferences in travel demand forecasting), and establishment surveys to investigate how suppliers make decisions.
- **Performance Measures**—use observed data and market research to produce analytic findings that measure land market performance.

Model and Analytic Tool Improvements

- **Innovation**—Respond in creative ways to emerging requests for analytic improvements.

Model Maintenance

- **Validation**—Conduct appropriate validation exercises for forecast models.
- **Upkeep**—Maintain model software in sustainable software frameworks.
- **Update**—Review model, model structures, equations, and parameters in order to sustain “state of the practice” forecasting capabilities

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Survey, Data Acquisition, and Research (Model Improvements also listed here for clarity)

- Enhancing Metro’s use of Census and other federal data, defining and implementing optimal coordination activities between Metro and local agencies regarding the 2020 Census. [Ongoing]
- Continue acquiring new data for, publishing information products from, and enhancing the Land Development Monitoring System especially for residential rental price; supplier redevelopment location, type, and frequency; and commercial development. [Data plan

by June 2018]

- Develop a peer reviewed housing and transportation cost calculator for the current year and future year based on outputs derived from the MetroScope land use model (i.e., housing cost estimates) and Metro’s own travel demand model (i.e., travel costs based on auto ownership, value of time and other travel factors). [Prototype by June 2018]

Performance Measurement

- Ensure that LDMS data informs the build-out of Metro’s next-generation performance measurement information access system (see also the “Data and Performance Measurement” section of this UPWP). [June 2018]

Model Maintenance

- **Regional macro model** – Define and begin implementation of a long-term plan for the regional macro model’s evolution. [Plan by November 2018]
- **MetroScope model re-validation exercise** – Devise and begin implementation of a long-term land use allocation model and data improvement program. [Plan by November 2018]
- Creative analytic solutions to ad hoc transportation and land use planning data visualization and performance measurement needs from the Planning & Development and other Metro Departments through innovation activities [ONGOING]

Entities Responsible for Activity:

- Metro – Lead Agency
- Oregon Office of Economic Analysis and Portland State Population Research Center – Population (and economic) coordination per State regulations
- Local Governments – coordination per State regulations
- Stakeholders (academics and non-governments) – collaboration and consensus building

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major project deliverables/milestones* sections.

Funding History:

Please note that due to modifications to the organizational chart and funding structure for the Research Center, the budget for Economic and Land Use Forecasting has increased and been split across two programs: Maintenance vs. Development & Application. This increase reflects primarily a change in funding source for existing staff rather than a net increase of staff or staff time.

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$517,340	3.415
2012-13	\$373,916	2.45
2013-14	\$425,151	2.6

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2014-15	\$576,019	2.4
2015-16	\$600,099	2.528
2016-17	\$429,699	1.553

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 197,163	PL	\$ 84,295
Interfund Transfers	\$ 140,172	STBG	\$ 274,371
Materials and Services	\$ 113,000	TriMet Support	\$ 50,445
		Metro	\$ 41,223
TOTAL \$ 450,335		TOTAL \$ 450,335	

Full-Time Equivalent Staffing

Regular Full-Time FTE	1.483
TOTAL	1.483

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 129,813	PL	\$ 162,105
Interfund Transfers	\$ 113,244	STBG	\$ 7,286
Materials and Services	\$ 41,300	Metro	\$ 114,966
TOTAL \$ 284,357		TOTAL \$ 284,357	

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.8570
TOTAL	0.8570

Travel Forecast Maintenance Program

Staff Contact: Chris Johnson, chris.johnson@oregonmetro.gov

Description:

The Travel Forecast Maintenance Program includes work elements necessary to keep the travel demand model and various ancillary tools responsive to issues that emerge during the regional transportation planning process. The major work activities and projects within this program area include model maintenance innovation, and both statewide and national professional involvement.

The program area is critical because the travel demand model provides the analytical foundation for transportation policy and investment decisions

Objectives:

The Federal Highway Administration (FHWA), Federal Transit Administration (FTA), and Environmental Protection Agency (EPA) require that project modeling be carried out using methods, techniques and tools that meet certain guidelines. Failure to meet the guidelines may result in analytical conclusions that do not meet Federal approval.

Thus, the primary objective for this program is to ***ensure the validity and utility of the modeling methods, techniques and tools***. This is achieved through the work elements listed under the Model Maintenance, Innovation, and Statewide and National Professional Involvement categories.

Previous Work (conducted under single Model Development program area):

Travel Behavior Surveys

- The last comprehensive travel behavior survey for this region was conducted in 2011. The data serves as a basis to understand the degree to which various stimuli (demographics, urban form, cost, travel time, lifestyle choices, etc.) affect traveler behavior and choices.

New Models

- **Activity Based Model:** A new dynamic activity based model has been developed for this region. Results from the 2011 travel behavior survey were used in the model estimation.
- **Trip Based Model (current model):** The trip-based model was re-estimated to better reflect behavior patterns and choice characteristics derived from the household travel behavior survey data. In addition, the model was updated to a 2015 base year.
- **Freight Model:** A SHRP2 C-20 IAP grant was awarded to Metro. A consultant team was contracted to assist with the project. A prototype model framework was implemented using national data. Additional data was collected from local data from establishments, logistic firms, and other sources. These data were used to refine the prototype model to ensure that it more closely reflects the conditions in Portland. To meet the match requirement, Metro performed various tasks

- throughout the project (e.g., national zonal definition and network coding).
- Bike Routing Algorithm: The routing algorithm is being reviewed and re-evaluated to potentially include a variety of simplifying features to ease the application of the tool by external partners such as the City of Portland.
 - Multi-Criterion Evaluation (MCE) Toolkit: The MCE Toolkit consists of three tools: a benefits calculator to determine monetized benefits of transportation projects based on outputs from the regional travel demand model, a project costing tool, and a visualizer that calculates B/C ratios, and summarizes and visualizes results. Phase I of the MCE project was completed in FY2017.
 - Housing+Transportation Cost Index. Modeling program staff collaborated with Land Use team staff to prototype a H+T cost “viewer” for both current and forecast states of the regional land markets and transport system.

Model Maintenance

- Modeling Network Attributes: Metro modeling staff reviewed and updated the modeling network assumptions (e.g., uncongested speeds, vehicle throughput capacities, transit line itineraries). These attributes were incorporated into a master network database system.
- Travel Demand Model Input Data: Model input data was reviewed and updated. Variables such as intersection densities, household and employment accessibility, and parking cost assumptions were adjusted to reflect 2015 conditions.
- Travel Demand Model Computer Code: Model application code was refined to address specific needs (e.g., model application interface, code changes required by the model re-estimation)

Statewide and National Professional Engagement

- Oregon Modeling Steering Committee: Staff participated on the OMSC Executive Committee and several affiliated subcommittees.
- Transportation Research Board Committees: Staff served on the TRB Transportation Planning Applications Committee. This committee is instrumental in providing a forum for advancing model application guidelines.

Methodology:

The following methods will be applied to achieve the objectives of the Model Development Program:

Innovation

- Ad hoc research and development: “Innovation” efforts respond during the year to emerging issues and needs (e.g. the Housing+Transportation cost index tool described in the *Economic, Demographic and Land Use Forecasting* section of this document is a multi-program innovation effort).
- Strategic visioning for long-range model enhancements. Metro RC continues to scope research and development of new tools and methods for analyzing and forecasting travel-related information.

Model Maintenance

- Modeling Network Attributes: Metro will continue to collaborate with the regional modeling partners to ensure the validity of the network assumptions found in the network. Additional staff resources will also be devoted to refining the zone system required to support the activity-based model platform
- Travel Demand Model Input Data: The model input data will be modified as warranted. Such things as intersection densities, household and employment accessibility, and parking cost assumptions will be refined. The activity-based model requires more extensive input data than the trip-based model and, as such, this effort will require additional staff resources.
- Travel Demand Model Computer Code: Model application code will be modified, as warranted.
- Software Expertise: As new versions of the network modeling software are released, staff will take steps to maintain and expand their expertise.

Statewide and National Professional Engagement

- Oregon Modeling Steering Committee: Staff will continue to participate on the OMSC (Metro now chairs the OMSC) and affiliated subcommittees.
- Transportation Research Board Committees: Staff will continue to serve on TRB committees that influence national planning guidelines.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Model Maintenance

- Modeling Network Attributes: Modified networks that reflect current assumption sets. (As warranted). Final zone system for activity-based model.
- Travel Demand Model Input Data: Modify model input data that reflect current assumption sets. (As warranted). Final input data set for activity-based model.
- Travel Demand Model Computer Code: Modify model application code. (As warranted)
- Coordinate with the performance measurement and data acquisition programs described in the Data Management, Data Visualization, and Performance Measurement section of this document to ensure that they both provide information necessary for the travel forecasting efforts and make good use of information from the travel forecast models.

Statewide and National Professional Development

- Oregon Modeling Steering Committee: Staff participation on OMSC. (Ongoing).
- Transportation Research Board Committees: Staff participation on TRB. (Ongoing).

Innovation

- Conduct research and development on emerging issues as needs and resources indicate

Entities Responsible for Activity:

Model Maintenance

- Metro – Product Owner/Lead Agency

Statewide and National Professional Development

- Metro in collaboration with other professionals

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Planned Milestones* section.

Funding History:

The travel demand model must be kept current and robust to remain a viable tool for analyzing future travel condition. The confidence level of the model must be such that it can ensure the provision of sound information for policy and investment decisions. Thus, the Travel Forecast Maintenance program is funded each year to meet that need. Key areas within the program include the maintenance of the model input data (Model Maintenance), conducting research on state of the art methods (Innovation), and the staff participation on local and national research and model implementation committees (Statewide and Professional Involvement).

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$843,236	2.9
2012-13	\$860,307	4.837
2013-14	\$693,559	4.11
2014-15	\$875,764	3.56
2015-16	\$934,920	3.723
2016-17	\$1,136,273	4.082

FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services	\$ 780,435
Interfund Transfers	\$ 554,844
Materials and Services	\$ 34,016

Resources:

PL	\$ 845,527
STBG	\$ 141,765
ODOT Support	\$ 88,891
TriMet Support	\$ 63,463
Metro	\$ 229,648

TOTAL \$	\$1,369,295	TOTAL \$	1,369,295
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I. GENERAL MPO TRANSPORTATION PLANNING

Full-Time Equivalent Staffing

Regular Full-Time FTE	5.744
TOTAL	5.744

FY 2018-19 Cost and Funding Sources:

Requirements:

Personal Services	\$ 529,904
Interfund Transfers	\$ 462,269
Materials and Services	\$ 35,585

Resources:

PL	\$ 659,383
ODOT Support	\$ 19,196
TriMet Support	\$ 98,527
Metro	\$ 250,652

TOTAL \$	1,027,758	TOTAL \$	1,027,758
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Full-Time Equivalent Staffing

Regular Full-Time FTE	3.787
TOTAL	3.787

Technical Assistance Program

Staff Contact: Cindy Pederson, cindy.pederson@oregonmetro.gov

Description:

The purpose of the Technical Assistance program is to provide transportation data and modeling services for projects that are of interest to local entities. Clients of this program include regional cities and counties, TriMet, the Oregon Department of Transportation (ODOT), the Port of Portland, private sector businesses, and the general public. In addition, client agencies can use funds from this program to purchase and maintain copies of the transportation modeling software used by Metro. A budget allocation defines the amount of funds that is available to each regional jurisdiction for these services.

Objectives:

US Department of Transportation (USDOT) protocols require the preparation of future year travel forecasts to analyze project alternatives. Similarly, modeling is required by the Environmental Protection Agency (EPA) in project analysis to quantify emissions in air quality analysis.

Thus, the primary objective of this program is to ***provide travel modeling tools and services to clients for local project needs.***

Previous Work:

- Provided data and modeling services to regional jurisdictions and agencies (e.g., provided survey data tabulations to jurisdictions; provided modeling support to TriMet, Washington County, and the City of Portland).
- Provided data and modeling services to private consultants and other non-governmental clients (e.g., modeling support services to a jurisdiction in Clackamas County via private consultant).
- Purchased and maintained modeling software for seven governmental agencies (ODOT Region 1, City of Portland, City of Gresham, City of Hillsboro, Clackamas County, Multnomah County, and Washington County).

Methodology:

Provide Transportation Data and Modeling Services

- Data and modeling services are provided to jurisdictions, regional agencies, and the private sector upon request.

Modeling Software

- Upon request, transportation network modeling software is purchased and maintained for regional agencies. There are currently seven agencies that participate in this program.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Data and modeling services to jurisdictions and regional agencies (Upon request). This will likely include:

- Support to Oregon DOT on its Value Pricing analysis for the Metro region.

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- Support to local agencies for Title VI analyses.
- Data and modeling services to private consultants and other non-governmental clients. (Upon request)
- Funds to the local governmental agencies to purchase and pay maintenance on transportation modeling software. (Upon request)

Entities Responsible for Activity:

Metro – in collaboration with clients

Schedule for Completing Activities:

Data and modeling services are provided to jurisdictions and regional agencies upon request. Schedules are negotiated at the time of the requests.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2012-13	\$81,916	0.409
2013-14	\$77,658	0.370
2014-15	\$174,224	0.712
2015-16	\$118,744	0.407
2016-17	\$98,421	0.35

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 49,266	STBG	\$ 65,046
Interfund Transfers	\$ 35,035	ODOT Support	\$ 23,325
Materials and Services	\$ 19,014	TriMet Support	\$ 7,489
		Metro	\$ 7,445
TOTAL \$ 103,305		TOTAL \$ 103,305	

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.35
TOTAL	0.35

I. GENERAL MPO TRANSPORTATION PLANNING

FY 2018-19 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	48,510	STBG	\$	67,979
Interfund Transfers	\$	42,318	ODOT Support	\$	25,828
Materials and Services	\$	19,176	TriMet Support	\$	8,417
			Metro	\$	7,780
TOTAL \$ 110,004			TOTAL \$ 110,004		

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.33
TOTAL	0.33

MPO Management & Services

Staff Contact: Tom Kloster, tom.kloster@oregonmetro.gov

Description:

Metropolitan Planning Organization (MPO) Management and Services provides overall management and administration of Metro's Metropolitan Planning Organization (MPO) role.

Overall department administration includes:

- preparation and administration of the Unified Planning Work Program (UPWP),
- procurement,
- contract administration,
- grants administration,
- internal and external reporting,
- human resource management,
- quadrennial review and annual self-certification of meeting MPO requirements,
- certifications and assurances filing to demonstrate capacity to fulfill MPO requirements,
- public participation in support of MPO activities,
- air quality modeling support for MPO programs, and
- staffing and services to meet required needs of the various standing MPO advisory committees, including:
 - Metro Council
 - Joint Policy Advisory Committee on Transportation (JPACT)
 - Transportation Policy Alternatives Committee (TPAC)
 - Project-specific working groups and advisory committees

As an MPO, Metro is regulated by Federal planning requirements and is a direct recipient of Federal transportation grants to help meet those requirements. Metro is also regulated by State of Oregon planning requirements that govern the Regional Transportation Plan (RTP) and other transportation planning activities. The purpose of the MPO is to ensure that Federal transportation planning programs and mandates are effectively implemented, including ongoing coordination and consultation with state and federal regulators.

As the MPO, Metro is responsible for preparing the annual Unified Planning Work Program (UPWP), a document that coordinates activities for all federally funded planning efforts in the Metro region. Metro follows recently adopted state protocols for developing the UPWP to ensure adequate opportunity for state and local partners to develop project narratives, for state and federal consultation on the draft UPWP and for adoption of the final plan by JPACT and the Council in a timely manner for submittal to ODOT and the USDOT. Once adopted, the UPWP is a living document, and Metro makes periodic amendments, as needed, under procedures established in the UPWP. Amendments to the UPWP area submitted to USDOT for approval.

JPACT serves as the MPO board for the region in a unique partnership that requires joint action with the Metro Council on MPO actions. TPAC serves as the technical body that works with Metro staff to develop policy alternatives and recommended actions for JPACT and the Metro Council.

As the MPO for the Portland region, for meeting recently adopted federal transportation performance measures. Metro is coordinating with ODOT and TriMet to determine roles and responsibilities for setting targets and collecting monitoring data needed to report our progress toward these measures. In related work (described separately in the UPWP), Metro and ODOT plan to follow the 2018 RTP adoption with an update to our regional mobility policy. Our goal is to continue linking our mobility policy to the 24 mobility corridors that make up our Regional Mobility Atlas, and we believe this approach strongly meets the intent of federal regulations for tailoring our performance-based planning and programming to conditions on the ground. As part of this work, we will likely fine-tune our performance targets and measures as they relate to federal requirements.

Metro also maintains intergovernmental agreements (IGAs) and memorandums of understanding (MOUs) with local on general planning coordination and special planning projects. These agreements include:

- South Metro Area Rapid Transit (SMART) MOU (*effective through June 30, 2020*)
- Southwest Washington Regional Transportation Council (RTC) MOU (*effective through June 30, 2018*)
- Oregon Department of Environmental Quality MOU (*effective through February 2023 (agreement still being finalized)*)
- 3-Way Planning IGA with ODOT and TriMet (*effective through June 19, 2018*)

Metro belongs to the Oregon MPO Consortium (OMPOC), a coordinating body made up of representatives of all eight Oregon MPO boards. OMPOC was founded in 2005 to build on common MPO experiences and to advance the practice of metropolitan transportation planning in Oregon. OMPOC meets four times each year and operates under its own bylaws. Metro staff also participates in the quarterly MPO & Transit District coordination meetings convened by ODOT, and attended by all eight MPOs, several transit districts, ODOT, FHWA and other state and federal agencies, as needed.

Objectives:

Provide consistent and ongoing administrative support for the regional transportation planning programs. (ONGOING)

- Maintain an updated Unified Planning Work Program (UPWP), including annual updates and periodic amendments, as needed to advance regional planning projects (ONGOING)
- Complete quarterly and year-end planning progress reports to be submitted to FTA and FHWA via ODOT (ONGOING)
- Complete an annual self-certification review of compliance with federal transportation planning requirements (ONGOING)
- Complete the 5-year federal certification review by FHWA, FTA and EPA (2021)
- Complete annual recruitment of community representatives for TPAC's six community member seats (three seats are filled annually for 2-year terms)
- Maintain planning intergovernmental agreements and memorandums of understanding with regional planning partners to ensure timeline delivery of planning program products and funding (ONGOING)

Previous Work:

Work completed in the 2016-17 fiscal year included:

- Adoption of the revised 2018-19 UPWP.
- Completion of quarterly and year-end planning progress reports in 2017-18 submitted to FTA and FHWA via ODOT.
- Coordination of the UPWP with the 2018-19 Metro budget.
- Completion of the 2017 Quadrennial Review.
- Completion of the 2017 annual self-certification.
- Update of the Metro Public Participation Plan.
- Organization of twelve JPACT meetings and twelve TPAC meetings in 2017-18, as well as coordination of agenda items on Metro Council, MPAC, MTAC meetings as needed.
- Recruitment of community representatives for the 2018-19 (calendar year) cycle.
- Participation in quarterly Oregon MPO and Transit staff meetings and quarterly OMPOC meetings.
- Complete scheduled updates to IGAs and MOUs.
- Provision of MPO staff support, as needed.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-19:

- Adoption of the 2019-20 UPWP.
- Completion of quarterly and year-end planning progress reports for 2018-19 submitted to FTA and FHWA via ODOT.
- Coordination of the UPWP with the 2019-20 Metro budget.
- Completion of the 2018 annual self-certification.
- Organization of twelve JPACT meetings and twelve TPAC meetings as well as coordination of agenda items on Metro Council, MPAC, MTAC meetings as needed.
- Complete recruitment of TPAC community representatives for the 2019-20 (calendar year) cycle.
- Participation in quarterly Oregon MPO and Transit staff meetings and quarterly OMPOC meetings.
- Complete scheduled updates to IGAs and MOUs.
- As part of updating the 3-way Metro, ODOT and TriMet IGA, create a new exhibit that describes roles and responsibilities for target setting and data sharing necessary to meet federal performance requirements.
- Provision of MPO staff support, as needed.

Entities Responsible for Activity:

- Metro – Product Owner/Lead Agency
- Oregon Department of Transportation – Cooperate/Collaborate
- TriMet – Cooperate/Collaborate
- South Metro Area Regional Transit (SMART) – Cooperate/Collaborate
- Oregon MPO Consortium (OMPOC) - Cooperate/Collaborate

Other Stakeholders:

- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)
- Oregon Transportation Commission (OTC)
- Oregon Department of Environmental Quality (DEQ)
- US Environmental Protection Agency (EPA)

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major project deliverables/milestones* section.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2013-14	\$1,644,305	8.42
2014-15	\$321,436	1.52
2015-16	\$305,930	1.45
2016-17	\$281,194	1.2

FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services	\$ 123,518
Interfund Transfers	\$ 50,441
Materials and Services	\$ 46,100
Contingency	\$ 72,318

Resources:

PL	\$ 292,376
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TOTAL	\$	292,376	TOTAL	\$	292,376
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Full-Time Equivalent Staffing

Regular Full-Time FTE	.8
TOTAL	.8

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 155,881	PL	\$ 276,999
Interfund Transfers	\$ 66,195		
Materials and Services	\$ 54,922		
TOTAL \$ 276,999		TOTAL \$ 276,999	

Full-Time Equivalent Staffing

Regular Full-Time FTE	<u>0.97</u>
TOTAL	0.97

Regional Safety Program

Staff contact: Lake McTighe, lake.mcTighe@oregonmetro.gov

Description

Metro is formalizing regional transportation safety activities in a Regional Safety Program to support Vision Zero and achieving national, state, regional and local safety performance targets. A two-year work plan will be developed to guide Metro activities related to transportation safety and coordinate with federal, state and local partners. The work plan will be based on the strategies and actions identified in the 2018 Regional Transportation Safety Strategy and the Regional Safe Routes to School Program.

Starting in 2009, in response to a Federal Highway Administration recommendation to better incorporate safety into the MPO planning process, Metro began working with local governments, ODOT, TriMet, practitioners and researchers to draft the region's first Regional Transportation Safety Plan. The plan built on the 2011 Oregon Transportation Safety Action Plan and the 2012 Clackamas County Transportation Safety Action Plan.

Since the completion of the 2012 Regional Transportation Safety Plan, governments and communities across the country have recognized the need for new strategies and approaches, such as Safe Systems, Vision Zero, Toward Zero Deaths and Road to Zero, in order to make streets safe. Cities and counties in the region have developed transportation safety action plans with targets for zero deaths and severe injuries, and the federal government has a stated goal of zero deaths and severe injury crashes in thirty years. Additionally, the region and state have increased funding and programs for Safe Routes to School. Increasing Safe Routes to School is a core element of the Regional Safety Program.

There is a recognition that funding and programs need to ramp up to address fatal and severe crashes for all modes of travel, especially for vulnerable users. The 2018 Regional Transportation Safety Strategy uses the Safe Systems and Vision Zero frameworks and identifies recommended strategies and actions for all partners. The Regional Safety Program work plan will describe steps Metro will take to implement Metro related actions identified in the 2018 Regional Transportation Safety Strategy and Regional Safe Routes to School Program.

Tasks in the Regional Safety Program work plan will include annual reports to the Metro Council and JPACT, schedules to update regional plans and the Regional Transportation Functional Plan to reflect current policy direction, activities to coordinate with partners and increase awareness of Vision Zero and Safe Routes to School, identifying legislative priorities, and refining regional funding criteria.

Objective

Adopt the 2018 Regional Transportation Safety Strategy. Develop and implement a two-year work plan to support implementation of the 2018 Regional Transportation Safety Strategy and Safe Routes to School Program.

Previous Work

- Establishment of ad-hoc Regional Safety Workgroup in 2009.
- Adoption of regional safety targets in 2010 Regional Transportation Plan.
- Completion of the 2011 State of Safety Report.
- Completion of the 2012 Regional Transportation Safety Plan.
- Adoption of the 2014 Climate Smart Strategy, which included recommended actions for safety.
- Update of safety targets and policy in the 2014 Regional Transportation Plan.
- Adoption of Portland’s Vision Zero Plan and Transportation Safety Action Plans in Beaverton, Hillsboro, Clackamas County and Washington County.
- Adoption of the 2016 Oregon Transportation Safety Action Plan.

Work Completed in 2017-18 included

- Development of the 2018 Regional Transportation Safety Strategy, including updated Vision Zero safety target, annual safety targets to meet federal requirements, safety performance measures, strategies and actions, developed with guidance from technical safety work group, Metro technical and policy advisory committees, and Metro Council.
- Completion of the 2017 State of Safety Report.
- Identification Regional High Injury Corridors using replicable GIS based methodology.
- New safety policy section in the 2018 Regional Transportation Plan.
- Completion of the Regional Travel Options Strategy including a Safe Routes to School Program.

Methodology

Metro will manage the Regional Safety Program and the development of a two-year work plan. Metro will also consult with partners listed under Other Stakeholders in the development of the work plan and actions to implement safety actions.

Major Project Deliverables and Schedule for Completion in FY 2018-2019:

Two-year Regional Safety Program work plan and initial implementation activities.

Entity/ies Responsible for Activity

Metro – Product Owner/Lead Agency

Other Stakeholders

- Local Cities and Counties
- Police and Fire
- Oregon Department of Transportation
- Oregon Department of Land Conservation and Development
- Port of Portland
- TriMet, SMART and other transit operators in the region
- U.S. Department of Transportation/ Federal Highway Administration

(The 2018 Regional Safety Strategy includes an extensive list of partners that could play a role in the Regional Safety Program)

Funding History

This program is being described for the first time in this UPWP, and therefore does not include a discrete funding history.

FY 2018-19 Cost and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	19,380	STBG	\$	24,774
Interfund Transfers	\$	8,230	Metro	\$	2,835
TOTAL \$			TOTAL \$		
27,609			27,609		

Full-Time Equivalent Staffing

Regular Full-Time FTE	<u>0.133</u>
TOTAL	0.133

Mobility Policy Refinement Planning

Staff contact: Tom Kloster, Tom.Kloster@oregonmetro.gov

Description

As part of adopting the 2000 RTP, the first transportation plan to fully implement the Region 2040 Growth Concept, Metro developed a new approach to managing mobility. The new policy came from an extensive conversation with regional elected officials and policy makers over a two-year period, including an alternatives analysis to help officials better understand the tradeoffs in making mobility investments.

The new policy was adopted by the Oregon Transportation Commission in [2002] as an amendment to the recently completed 1999 Oregon Highway Plan (OHP), and has been in effect since then. This new emphasis on a tailored mobility policy and multi-modal solutions was also incorporated into the Oregon Transportation Plan (OTP) in 2006, the policy document that frames and organizes all of the state's modal plans for transportation.

The new mobility policy broke from the historic practice of "once size fits all" congestion standards for roads and freeways to a more tailored approach that centered the function of major streets on land use outcomes, and focused mobility expectations on the freeway system.

The new policy also recognized that historic expectations of "building your way out" of peak-hour highway congestion was not only fiscally and technically unattainable, but also had unintended impacts that were inconsistent with the larger 2040 vision, including encouraging sprawl and undermining the broader public and private investments being made in centers and transit corridors.

In the 2010 RTP, Metro expanded on the concept with the development of a series of regional mobility corridors that provide the geography for monitoring and reporting on mobility. Twenty-four mobility corridors were developed, with each corridor framed by Region 2040 land use outcomes, and bundling highways, transit, major streets and bikeway in each mobility corridor as a complementary parts of an integrated system. Metro publishes a periodic Regional Mobility Atlas to provide ongoing tracking of these corridors as a foundation for planning and project development work in the region.

In 2013, ODOT published the Corridor Bottleneck Operations Study (CBOS), another tool for understanding and responding to congestion bottlenecks on highways within the regional mobility corridors. This tool has since been used to prioritize system management investments across the metro region with an eye toward fine-tuning a mature highway system with strategic improvements.

Despite these efforts to keep pace with traffic growth in the region, in the region, congestion has continued to grow since the 2000 RTP mobility policy was adopted. During this time, the region has experienced significant population and employment growth, straining all parts of our transportation

system. During the same period, state investments in the region's freeway system continued to decline from historic levels due to slowing state and federal transportation funding. In recent years, ODOT has adapted to this new fiscal reality with an emphasis on fine-tuning the freeway system with improved operational management and strategic capacity improvements. The few major freeway projects envisioned for the system in the 2018 RTP are also focused on bottlenecks that are part of this shift toward maintaining a mature system.

More recently, the U.S. Department of Transportation issued new regulations (through MAP-21 / FAST Act) for states and MPOs that will require greater monitoring of mobility on our freeway system and setting targets for system performance. While these new requirements differ somewhat from the current mobility policy for the region, the approach is similar, with a focus on specific segments of the freeway system.

To meet the new federal mandate and the growing challenges on our freeway system, ODOT and Metro propose to work in partnership on a refinement to our regional mobility policy, upon completion of the 2018 RTP. This will allow the refinement work to build on a rich data set and updated policy framework from the RTP, with the goal of better informing system management and investments in the region.

This work would produce two major policy frameworks for consideration by JPACT, the Metro Council and the Oregon Transportation Commission. First, a corridor-specific mobility strategy would be developed for the National Highway System for the purpose of meeting federal requirements, and because the NHS generally corresponds to the interstate and statewide highway system defined in the Oregon Highway Plan (OHP).

Second, a mobility corridor-based strategy for managing congestion on regional arterial streets that support the interstate and statewide highways would be developed and incorporated into the Regional Transportation Plan (RTP).

Together, these new policy frameworks would guide system development as part of future RTP updates and the development of city and county Transportation System Plans (TSPs) and the regions ongoing Congestion Management Process (CMP).

Objective

Complete a 2-year refinement planning effort to modernize the regional mobility policy to better reflect current. The results of this effort would be amended into the RTP and Oregon Highway Plan.

Previous Work

- Adoption of the Oregon Highway Plan (OHP) in 1999.
- Adoption of the Interim Regional Mobility Policy for the Metro region in the 2000 RTP.
- Ongoing implementation of the region's Congestion Management Process (CMP) since adoption of the 2000 RTP.
- Adoption of the Interim Regional Mobility Policy in the Oregon Highway Plan in 2002.
- Adoption of Oregon Transportation Plan (OTP) in 2006.

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- Creation of Regional Mobility Corridors in the 2010 RTP as a tool for framing mobility investments.
- Updates to the Oregon Transportation Planning Rule (TPR) and Oregon Highway Plan (OHP) in 2011 to address emerging statewide issues in congestion management.
- Completion of the Corridor Bottleneck Operations Study (CBOS) in 2013.
- Creation of ODOT Region 1 Active Traffic Management (ATM) strategy in 2014.
- Completion of ODOT's Portland Regional Traffic Management Report in 2016.
- Publication of the Regional Mobility Corridor Atlas in [year] and 2015.

Work Completed in 2017-18 included:

- Collaboration with ODOT in analysis and formal comment on new USDOT mobility regulations.
- Initial discussions with ODOT on a refinement planning partnership to address mobility policy in the region.

Methodology

Metro's partnership with ODOT on this work will include project scoping with county, city and special districts in the region, a steering or advisory committee that includes a broad cross section of stakeholders to create an inclusive work plan. Metro and ODOT will also consult with federal agencies during the scoping phase.

Metro and ODOT will formalize project management and funding through an intergovernmental agreement that spans the 2-year extent of the project.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019

Scoping is expected to begin in the third quarter and continue through the fiscal year, with a draft IGA and detailed work plan completed by the end of the fiscal year.

Entity/ies Responsible for Activity:

Metro and ODOT – Product Owner/Lead Agency

Other Stakeholders

- Local Cities and Counties
- Regional Transportation Council of Southwest Washington
- Ports of Portland and Vancouver
- TriMet, C-TRAN and other transit operators in the region
- Metro Parks & Nature Department
- Oregon Department of Transportation
- Oregon Department of Land Conservation and Development
- Oregon Department of Environmental Quality
- U.S. Department of Transportation

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Milestones* section.

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Funding History

This project is being described for the first time in this UPWP, and therefore does not include a discrete funding history.

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 41,409	STBG	\$ 52,934
Interfund Transfers	\$ 17,584	Metro	\$ 6,059
TOTAL	\$ 58,993	TOTAL	\$ 58,993

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.25
TOTAL	0.25

Complete Streets

Staff Contact: Lake McTighe, lake.mctighe@oregonmetro.gov

Description:

Metro’s “Complete Streets” Program was established to provide transportation design guidelines and other tools to support local jurisdictions to design streets that implement the 2040 Growth Concept. The Program started with the release of the *Creating Livable Streets* guidelines in 1997. Since then the Program has grown to include a suite of guidelines: *Green Streets*, *Trees for Green Streets*, *Green Trails: Guidelines for Environmentally Friendly Trails*, and *Wildlife Crossings: Providing safe passage for urban wildlife*.

The Complete Streets Program implements Regional Transportation Plan (RTP) design policies for regional transportation facilities and includes ongoing involvement in local transportation project conception, funding, and design. Metro’s Regional Transportation Functional Plan (RTFP), the implementing plan of the RTP, specifies that city and county street design regulations shall allow implementation of the recommended designs. This program also addresses Federal context-sensitive design solutions initiatives and requirements to develop mitigation strategies to address impacts of the transportation projects.

Other program elements include providing technical assistance to cities and counties as transportation projects are developed, and providing workshops, forums and tours to increase understanding and utilization of best practices in transportation design.

The Program guidelines were last updated in 2002 (with the exception of the *Wildlife Crossings*, which was completed in 2009) and content needs to be updated to reflect the state of the practice in transportation and incorporate missing topics, including designing for safety, age friendly communities, relationship of transportation design to public and environmental health, providing for effective freight and goods movements in multi-modal environments, trail design, cycle tracks and other protected bikeways and bicycle and transit interaction.

Objectives:

- Provide cities, counties and agencies with up-to-date, state of the practice, context sensitive and performance based guidance in street and trail transportation design through the update of the *Creating Livable Streets*, *Green Streets*, and *Trees for Green Streets* guidelines and development of new Regional Trail Design guidelines.
- Update and develop Program website with visual library, resources and other tools.
- Conduct forums, workshops and tours.
- Implement regional street-design policy and recommendations in the Regional Transportation Safety Plan by participating in local project development and design activities, including technical advisory committees, design workshops and seminars, as well as formal comment on proposed projects.
- Ensure that local plans and design codes adequately accommodate regional design objectives through the local Transportation System Plan (TSP) review process.
- Provide leadership in the professional engineering and planning community on innovative designs and the transportation/land use connection through the guidelines.

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- Develop shared strategies with partner agencies to increase awareness and use of the guidelines and result in on-the-ground projects that reflect innovative design that work for all users.
- Inspire and educate with imagery and visualizations, and represent the unique areas of the region and the different needs of communities. Create an understanding of beneficial outcomes that can occur with best practices.
- Draft updated policy language in Chapter 2 of the 2018 Regional Transportation Plan.
- Updated design classification map in Chapter 2 of the 2018 Regional Transportation Plan.

Previous Work:

- Completed Annotated Draft Table of Contents for updated guidelines.
- Completed Draft Chapter layout for updated guidelines.
- Completed Resource List for design guidelines.

Methodology:

Metro has traditionally participated in local project-development activities for regionally funded transportation projects. During FY 2018-19, the Complete Streets Program will continue to focus on projects that directly relate to implementation of Region 2040 land use components, including projects funded through the Metropolitan Transportation Improvement Program (MTIP).

Design is one of eight policy priority areas of the 2018 Regional Transportation Plan update; therefore, Program activities will be coordinated with the update of the Regional Transportation Plan to most effectively provide resources for implementing the RTP, the adopted *Climate Smart Communities Strategy* and recommendations in the 2007 *METRO Freight and Goods Movement Plan: Truck and Street Design Recommendations Technical Report*, 2012 *Regional Transportation Safety Plan*, and the 2014 *Regional Active Transportation Plan*. Opportunities to coordinate and collaborate with partner agencies, including ODOT, TriMet, SMART and DLCD, will be actively sought out in order to more effectively increase understanding, awareness and acceptance of Livable Streets and Trails.

Updates to the guidelines and additional activities in FY 2018-19 will be managed by Metro but guided by the Technical Work Group.

Periodic updates will be given to the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), the Joint Policy Advisory Committee on Transportation (JPACT), and the Metro Council. Direction from the Metro Council and the technical and policy advisory committees will inform the project.

To update the *Creating Livable Streets, Green Streets, and Trees for Green Streets* guidelines and to develop a new handbook on Regional Trail Design, Metro staff will work with experts within Metro, with the Consultant team and with the Technical Work Group, to review and revise content for design guidance. The Technical Work Group will meet approximately six times over the course of the update to the guidelines.

The update will incorporate recommendations from the *Metro Freight and Goods Movement Plan: Truck and Street Design Recommendations Technical Report* (May 2007); incorporate recommendations from the update of the *Regional Transportation Safety Plan* (May 2012); and

II. MPO PLANNING PROJECTS

incorporate design guidance recommendations from the *Regional Active Transportation Plan* (July 2014).

Updates to county and city transportation coordinating technical advisory committees and other stakeholder groups will be made to increase awareness of the project and receive input.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Workshop(s) and/or best practice tour(s).
- Updated Program webpage with resources including schematics, photo library, library of external resources, community and personal stories and case studies
- Update content of Creating Livable Streets, Green Streets, and Trees for Green Streets, and new regional trail design guidelines. Content will be combined into one comprehensive and holistic guide.
- Draft updated policy language in Chapter 2 of the 2018 Regional Transportation Plan.
- Updated design classification map in Chapter 2 of the 2018 Regional Transportation Plan.

Entities Responsible for Activity:

- Metro – Lead Agency
- Oregon Department of Transportation - Cooperate/Collaborate
- TriMet, SMART –Collaborate/Collaborate
- Cities, Counties, Special Districts, Agencies - Cooperate/Collaborate

Schedule for Completing Activities:

Update of the guidelines and related activities are planned to be completed by the end of FY 2018-19.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2014-15	\$234,581	1.1
2015-16	\$324,762	1.4
2016-17	\$248,401	1.0

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 140,049	STPBG	\$ 168,988
Interfund Transfers	\$ 42,451	Creating Livable Streets STBG	\$ 250,000
Materials and Services	\$ 62,300	Metro	\$ 40,551
ODOT Consultant Contract	\$ 200,000		\$
TOTAL \$	444,800	TOTAL \$	444,800

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Full-Time Equivalent Staffing

Regular Full-Time FTE	0.95
TOTAL	0.95

FY 2018-19 Cost and Funding Sources:

Requirements:

Personal Services	\$ 121,224
Interfund Transfers	\$ 51,478
Materials and Services	\$ 62,300

Resources:

PL	\$ 2,500
STBG	\$ 160,645
Creating Livable Streets STBG	\$ 50,000
Metro	\$ 21,856

TOTAL \$	235,002	TOTAL \$	235,002
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Full-Time Equivalent Staffing

Regular Full-Time FTE	0.8
TOTAL	0.8

Transportation System Management and Operations – Strategy Update

Caleb Winter, caleb.winter@oregonmetro.gov

Description

The Transportation System Management and Operations (TSMO) program follows a 10-year plan that ends 2020. The plan update will be known as the TSMO Strategy, in support of the RTP. The TSMO Strategy will guide program investments using RFFA funding, state funding, additional federal grant funds and local funds, building on investments in transportation system efficiency and supporting innovations. The TSMO Strategy will include key components of Metro’s system monitoring, performance measurement and Congestion Management Process (CMP). Most of the required CMP activities are related to performance measurement and monitoring. While the current plan continues to serve the region, an update is needed to formalize new concepts among regional TSMO partners including connected and automated vehicles, shared-use mobility, integrated corridor management, decision support systems, cloud-based analytics and “Smart City” urban applications of the Internet-of-Things (IoT).

Objectives

- Lead process for updating and adoption of the TSMO Strategy. Strategy will provide direction for new regional funding investments aimed at reducing greenhouse gas emissions.
- The Strategy update process will review past TSMO investments and the state of ITS in the region to understand the safety, livability, multimodal and reliability outcomes achieved.
- The process will look at how advances in information technology have changed methods to manage and operate the transportation system.
- Refine the program structure and funding process.
- Review regional coordination and collaboration around TSMO including Traffic Incident Management (TIM), Central Signal System, data communications (ITS Network) and data archiving and tools (PORTAL).

Previous Work:

Planning activities that inform the TSMO Strategy update include:

- 2006-2007 – development of regional ITS strategies (federal grant).
- 2008-2011 - an ODOT TGM grant supported the region’s first TSMO Plan.
- 2014 – a final Concept of Operations was completed for a large area around the area where I-84 and I-205 meets to consider Active Corridor Management elements ODOT, City of Portland and other regional partners could implement to improve reliability.
- 2014 – 2018 US DOT awarded Metro funds to lead an Integrated Corridor Management planning grant for the I-84 multimodal corridor from downtown Portland to Troutdale.
- 2016 – FHWA supported a regional workshop around capability maturity for traffic management.
- 2016 – Update of the regional ITS Architecture and data Communications Plan
- 2017 – Regional concept for next-generation Transit Signal Priority completed by TriMet

Methodology:

Refine regional strategy to guide TSMO investments and activities in the Portland metropolitan region, identifying and recommending policy to leverage the strategy. Engage a broad range of stakeholders to understand issues and needs from operators and the traveling public. Analyze multimodal performance data to advance the region’s ability to diagnose and address congestion, support multimodal operations, reduce climate and other impacts and incorporate safety connected to Vision Zero.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

- Stakeholder Participation Plan
- Refined Vision Goals and Objectives that are grounded in regional needs for people and goods movement. Topics to explore in refining vision goals and objectives include social equity, safety, resiliency, connected vehicles, automated vehicles, vehicle-to-X communications, transit signal priority, freight signal priority, mobility as a service/mobility on demand (e.g., public-private partnerships), performance measures, big data analytics and asset management.
- Updated TSMO Toolbox.
- Updated TSMO project list.
- Form agreements among operators supported by the region’s ITS Architecture, relationships and procedures, decision support systems and other shared understanding and operations methods.
- Updated Capability Maturity Framework for the TSMO program.
- Produce a final TSMO Strategy to recommend for adoption.

Entities Responsible for TSMO Strategy Update

Lead Agency

- Metro

Polycymaking

- Metro Council
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)

Operators

- TransPort and subcommittees (includes Portal Technical Advisory Committee, ITS Architecture, Central Signal System Users Group, ITS Network Management Team, Traffic Incident Management Coalition).
- Oregon Department of Transportation (ODOT) TriMet, Port of Portland, Counties of Clackamas, Multnomah & Washington, Cities of Beaverton, Gresham, Hillsboro, Portland, Lake Oswego, Tigard, Wilsonville and other cities

Cooperation and Collaboration

- Transportation Research and Education Center (TREC)/ Portland State University Federal Highway Administration (FHWA) Federal Transit Administration (FTA), US DOT ITS Joint Program Office
- Oregon State Police, County Sheriff Offices, Fire Bureaus, 911 Bureau of Emergency Communications, Washington County Consolidated Communications Agency and other incident responders and emergency managers.
- SW Regional Transportation Council, C-Tran
- Washington State Department of Transportation

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Milestones* section.

Funding History:

This Strategy update is being described separately from other planning activities for the first time, therefore it does not include a discrete funding history.

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Materials & Services – ODOT Consultant	\$ 302,828	TSMO STBG	\$271,728
		Metro	\$ 31,100
TOTAL \$ 302,828		TOTAL	\$ 302,828

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$100,000	TSMO STBG	\$271,728
Materials and Services (ODOT Consultant)	\$202,828	Metro	\$ 31,100
TOTAL \$302,828		TOTAL	\$302,828

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.6
TOTAL	0.6

Transportation System Management and Operations - Regional Travel Options (RTO) Strategy Update

Staff Contact: Dan Kaempff; daniel.kaempff@oregonmetro.gov

Description:

Regional Travel Options is one of two program areas under the broad policy heading of Transportation System Management and Operations (TSMO) – the other is the Regional Mobility program. Together these two programs advance TSMO strategies by coordinating the development, implementation and performance monitoring of regional demand and system management strategies that relieve congestion, optimize infrastructure investments, promote travel options, and reduce greenhouse gas emissions. Both the Regional Mobility Program and Regional Travel Options programs are key components of Metro’s Congestion Management Process (CMP).

The RTO program goals and objectives are derived from the Regional Transportation Plan, and are further defined via a strategic plan. The current strategic plan covers the years 2012-2017 and is in the process of being updated.

Objectives:

- Lead process for updating and adoption of the new RTO Strategy. Plan will provide direction for new regional funding investments aimed at reducing greenhouse gas emissions and expanding funding opportunities for Safe Routes to School education and outreach.
- The plan update process will examine outcomes achieved through the 2012-2017 RTO Strategic Plan to ascertain those investments’ success and contribution to achieving regional goals related to reducing single-occupant-vehicle trips and other key objectives.
- The process will look at how advances in information technology have changed people’s travel choices and will define strategies on how to best position the program to leverage further advances in order to improve communication and engagement with the public.
- Defining the necessary program structure and funding mechanism for supporting and investing in Safe Routes to School education and outreach programs at the region’s schools will be a component of the strategy update.
- Review regional coordination and collaboration around travel options education and outreach to determine key strategic investment areas and funding mechanisms to support partners’ activities in those areas.
- Update ongoing evaluation strategy to measure outputs and outcomes of all projects and programs supported with RTO funds, to ensure alignment with federal and regional goals related the vehicle miles traveled and air quality.
- Subsequent to the 2018 RTO Strategy adoption by JPACT and Metro Council, staff will lead a process to update the program’s funding allocation methodology so as to align with new policy direction, goals and objectives.

Previous Work:

This will be the fourth version of the RTO Strategy. The initial plan was drafted in 2003. This plan and the two subsequent plans have covered five-year time spans.

- The 2003 plan established the RTO program, building on the work done to implement the first two rounds of CMAQ funding in the Portland region. During the five-year span

covered by this plan, oversight of the regional program transferred from TriMet to Metro, and program evaluation activities commenced, to determine how well RTO investments were performing relative to the program's goals and objectives.

- The 2008 plan update refined roles and responsibilities for RTO partners, and laid out goals for program growth.
- The 2012 plan established a larger, more competitive funding strategy, and placed greater emphasis on program performance, measurement and evaluation.

Methodology:

The RTO strategic plan update will further define implementation of regional policies to reduce drive-alone auto trips and personal vehicle miles of travel and to increase use of travel options. The program improves mobility and reduces pollution by carrying out the TDM components of the TSMO strategy outlined in the 2035 Regional Transportation Plan (RTP). The program maximizes investments in the transportation system and relieves traffic congestion by managing travel demand, particularly during peak commute hours. Specific RTO strategies encompass promoting transit, ridesharing, cycling, walking, and telecommuting.

The planning process will engage stakeholders from around the region, working in both the public and private sectors, to develop a plan focused on achieving greater performance from the program investments, and facilitating the growth of the program throughout the region.

The 2018 RTO Strategy will take a 10-year look into the future and define a process for supporting growth in the program's partners, as well as continuing the work of key, critical investments that have proven value in reducing drive-alone auto trips.

Entities Responsible for RTO Strategy Update:

- Metro Council – Policy making
- Joint Policy Advisory Committee on Transportation (JPACT) – Policy making
- Transportation Policy Alternatives Committee (TPAC) – Policy making
- Transportation Research and Education Center (TREC) – Cooperate/Collaborate
- Oregon Transportation Commission (OTC) – Cooperate/Collaborate
- Federal Highway Administration (FHWA) – Cooperate/Collaborate
- Federal Transit Administration (FTA) – Cooperate/Collaborate
- Oregon Department of Transportation (ODOT) – Cooperate/Collaborate
- Westside Transportation Alliance TMA – Grant Recipient
- Explore Washington Park – Grant Recipient
- Ride Connection – Grant Recipient
- Bicycle Transportation Alliance – Grant Recipient
- Gresham Area Chamber of Commerce – Grant Recipient
- Verde – Grant Recipient
- City of Portland – Grant Recipient
- City of Gresham – Grant Recipient
- City of Lake Oswego – Grant Recipient
- West Columbia Gorge Chamber of Commerce – Grant Recipient
- Portland Public Schools – Grant Recipient
- National Safe Routes to School Alliance – Grant Recipient
- City of Tigard – Grant Recipient

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- Beaverton School District – Grant Recipient
- Portland Community College – Grant Recipient
- Housing Authority of Washington County – Grant Recipient
- Clackamas Community College – Grant Recipient
- TriMet – Grant Recipient
- City of Wilsonville/Wilsonville SMART – Grant Recipient
- Go Lloyd – Cooperate/Collaborate
- Swan Island TMA – Cooperate/Collaborate
- Clackamas County – Cooperate/Collaborate
- Multnomah County – Cooperate/Collaborate
- Washington County – Grant Recipient, Cooperate/Collaborate
- C-TRAN – Cooperate/Collaborate
- City of Vancouver – Cooperate/Collaborate
- SW Regional Transportation Council – Cooperate/Collaborate
- Washington State Department of Transportation – Cooperate/Collaborate

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

Develop updated funding allocation methods, based on partner's capability, capacity, interest and potential for success. The Strategy is scheduled for adoption by JPACT and Metro Council in Spring 2018. Allocation process should be in place by Fall 2018 and be used in awarding funding available July 1, 2019 and beyond.

Entities Responsible for RTO Plan Update:

- Metro Council – Policy making
- Joint Policy Advisory Committee on Transportation (JPACT) – Policy making
- Transportation Policy Alternatives Committee (TPAC) – Policy making
- Transportation Research and Education Center (TREC) – Cooperate/Collaborate
- Oregon Transportation Commission (OTC) – Cooperate/Collaborate
- Federal Highway Administration (FHWA) – Cooperate/Collaborate
- Federal Transit Administration (FTA) – Cooperate/Collaborate
- Oregon Department of Transportation (ODOT) – Cooperate/Collaborate
- Westside Transportation Alliance TMA – Grant Recipient
- Explore Washington Park – Grant Recipient
- Ride Connection – Grant Recipient
- Bicycle Transportation Alliance – Grant Recipient
- Gresham Area Chamber of Commerce – Grant Recipient
- Verde – Grant Recipient
- City of Portland – Grant Recipient
- City of Gresham – Grant Recipient
- City of Lake Oswego – Grant Recipient
- West Columbia Gorge Chamber of Commerce – Grant Recipient
- Portland Public Schools – Grant Recipient
- National Safe Routes to School Alliance – Grant Recipient
- City of Tigard – Grant Recipient
- Beaverton School District – Grant Recipient
- Portland Community College – Grant Recipient

II. MPO PLANNING PROJECTS

- Housing Authority of Washington County – Grant Recipient
- Clackamas Community College – Grant Recipient
- TriMet – Grant Recipient
- City of Wilsonville/Wilsonville SMART – Grant Recipient
- Go Lloyd – Cooperate/Collaborate
- Swan Island TMA – Cooperate/Collaborate
- Clackamas County – Cooperate/Collaborate
- Multnomah County – Cooperate/Collaborate
- Washington County – Grant Recipient, Cooperate/Collaborate
- C-TRAN – Cooperate/Collaborate
- City of Vancouver – Cooperate/Collaborate
- SW Regional Transportation Council – Cooperate/Collaborate
- Washington State Department of Transportation – Cooperate/Collaborate

Schedule for Completing Activities:

Fall 2018 – Completion of funding allocation methodology

Funding History:

This program is being described separately from the Regional Travel Options program for the first time in this UPWP, therefore does not include a discrete funding history.

FY 2018-19 Cost and Funding Sources:

Please refer to the funding section of the Transportation System Management and Operations - Regional Travel Options (RTO) narrative.

Economic, Demographic and Land Use Forecasting Development & Application Program

Staff Contact: Jeff Frkonja, jeff.frkonja@oregonmetro.gov

Description:

This chapter complements the Section I chapter “Economic, Demographic and Land Use Data and Forecasting Maintenance.” The Land Use Analytics Team (LUAT) conducts, in addition to the land use data and forecast capacity sustenance work described in Section I, long-term forecast tool development activities and tool applications to Metro’s planning responsibilities. This chapter describes these elements.

LUAT regularly updates long- range economic and demographic projections in order to incorporate the latest observed changes in demographic, economic, and real estate development conditions. Given forecast uncertainty, LUAT produces “risk-ranges” that quantify the variability in baseline growth projections which in turn inform risk analysis that tests alternative growth scenarios to evaluate ranges of potential economic, demographic, and land use impacts.

Objectives:

The development and application program is purposed to:

- making significant additions to the capacity of land use forecasting models, data, and knowledge;
- applying land use forecasting tools and data to Metro planning projects such as the Urban Growth Management process and the Regional Transportation Plan.

Previous Work:

Stakeholder Involvement

- Metro created the Land Use Technical Advisory Group (LUTAG) to advise Metro staff on the data, local conditions, and forecast validity of Metro’s land use toolkit. LUTAG is scheduled to convene regularly throughout the technical part of the 2018 Urban Growth Management planning process. LUTAG briefs standing Metro policy committees such as the Metro Technical Advisory Committee (MTAC).

Survey, Data Acquisition, and Research

- **Residential Housing Preference Survey** — Using the household preference survey for the Metro region from 2013, a deeper examination of the survey data is being performed to potentially update and revise parameters for the MetroScope land use model. The stated preference survey was designed to determine if tastes and preferences for housing might shift in future years as regional demographics evolve. This project has been delayed (2017) because further research and analysis of the survey data has determined that there are inherent biases in the data collection methodology that cannot be reconciled or corrected using standard econometric techniques. The current scope of work is being re-examined to determine if funds can be redirected to refine other parts of the MetroScope land use sub-models that need further attention and update.
- **Validation and Sensitivity Research (MetroScope land use model)** – RC staff completed

(in August 2017) validation and sensitivity analysis of its long-range land use forecast model. The validation report compared the near term land use forecast results from the model against observed or actual growth estimates. RC staff convened (in October 2017) an independent expert review panel. The expert panel reviewed the model and analyzed the results from the validation and sensitivity report. The report and expert panel comments will be published as additional model documentation for the Urban Growth Report (UGR) statistics and to be used in the support of the 2018 Urban Growth Management (UGM) Decision. The expert panel found the land use model to be generally sound, but the model to be a bit outdated. They recommended that the model needed to be modernized to bring the land use model up to date with current state of the practice.

- **Buildable Land Inventory** — The equilibrium land use model—MetroScope—requires land supply estimates based on observed data that incorporate the regulatory framework, development constraints, and development incentives for the Metro region. An operational version of the Developer Supply Processor (DSP) has been delivered (June 2017) to Metro by the consultant. RC staff and the consultant reviewed the DSP methodology with an independent expert peer review panel in May 2017. Recommendations from the expert panel were incorporated in the delivery of the draft DSP model. The final task of the consultant is to calibrate the DSP model and produce a final version that will forecast land supply estimates for the MetroScope land use model. The DSP model is based on real estate development pro forma methods to refine the buildable land inventory so that it better reflects prevailing real estate development assumptions. A redevelopment sub-model is included in the DSP that incorporates back-cast information to predict the future likelihood that a parcel will redevelop. These refinements should provide greater accuracy of land supply estimates and therefore the MetroScope land use model should produce more realistic real estate development projections.
- **Redevelopment model** – Metro plans to review the growth capacity of its urban growth boundary (UGB). This planning effort requires a UGR analysis and an UGM decision by the Metro Council by the end of 2018. The new redevelopment method is based on a set of discrete choice (binary logit) equations, segmented into 3 distinct real estate sub-markets: urban city of Portland, inner suburbs and outer suburbs. The equations predict the redevelopment probability of a tax lot. The new redevelopment model replaces obsolete redevelopment filters in the old BLI methodology. The redevelopment model should provide greater accuracy in estimating the buildable land inventory and therefore better land supply information to the UGR analysis and results.
- **Housing and Transportation Cost Index** – As part of its “innovation” work RC staff are developing a housing and transportation (H+T) cost index for the 2018 Regional Transportation Plan. The H+T index is capable of estimating the number of cost burdened households in the current base year (2015) and forecast year (2040) projection. Thus, real (inflation adjusted) index values can be used as a growth performance indicator that compares the H+T costs across periods for different land use or transportation growth scenarios. H+T costs can be combined in the index or left disaggregated for more detailed cost analysis. The definition for which households are cost burdened can also be reset in the calculation of the index so that it is not always set to 45%, which is a typical threshold for combined housing and transportation costs. The index not only calculates the cost burdened condition of the median household, but expands the calculation of the cost burden estimates for above average, average and below average income bracket households. Delivery of the H+T cost index model is expected at the end of October 2017.

Methodology:

Survey, Data Acquisition, and Research

- **Stakeholder involvement** — local review of land use model inputs, assumptions, and outputs is a key quality assurance aspect of LUAT forecasting.
- **Buildable Land Inventory (BLI)** —Sustain existing and develop new sources of land market performance and firm decision-making to inform the BLI and related cyclical data products
- **Market Research**—use consumer surveys to investigate the difference in actual market choices vs. stated preferences (similar to the use of revealed and stated preferences in travel demand forecasting), and establishment surveys to investigate how suppliers make decisions.
- **Performance Measures**—use observed data and market research to produce analytic findings that measure land market performance.

Model and Analytic Tool Improvements

- **Model Development**—Use observed market data, surveys, and the best statistical methods to inform appropriate changes to model structure, model inputs, and model output interpretation.
- **Innovation**—Respond in creative ways to emerging requests for analytic improvements.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Stakeholder Involvement

- Metro will likely sustain LUTAG and/or form other standing groups to advise on the adoption of the Distributed Forecast (the TAZ-level land use product derived from the regional forecast used in the Urban Growth Management process) and, perhaps, data and model enhancements (such as buildable land inventory upgrades and a developer supply pre-processor), and model structural improvements (potentially improved accounting for differences in observed market share vs. stated preference and self selection bias in the consumer module). [Primary involvement ends December 2018]

Survey, Data Acquisition, and Research (Model Improvements also listed here for clarity)

- Enhancing Metro’s use of Census and other federal data, defining and implementing optimal coordination activities between Metro and local agencies regarding the 2020 Census. [Ongoing]
- Continue acquiring new data for, publishing information products from, and enhancing the Land Development Monitoring System especially for residential rental price; supplier redevelopment location, type, and frequency; and commercial development. [Data plan by June 2018]
- **Conjoint market analysis** - use validated SP residential survey data to complete a market analysis assessing residential market share vs. stated preference, and if possible to re-scale MetroScope parameters in the residential demand equations based on the findings. (Task has been started but not expected to be completed until next FY). [June 2019]
- Develop a peer reviewed housing and transportation cost calculator for the current year and future year based on outputs derived from the MetroScope land use model (i.e., housing cost estimates) and Metro’s own travel demand model (i.e., travel costs based on auto ownership, value of time and other travel factors). [Prototype by June 2018]

Model Improvements

- **Metroscope developer treatments** – continue work on the Developer Supply Preprocessor and other model features to upgrade or replace Metroscope. [December 2019]
- **Residential self-selection bias** –with consultant support staff will examine means of better addressing potential selection bias effects in Metroscope, perhaps through a neighborhood choice level in the residential (consumer) module or the application of household sorting submodels. [Task won't be initiated until after proper vetting of the research findings from the conjoint market analysis, but could be by December 2019]

Entities Responsible for Activity:

- Metro – Lead Agency
- Oregon Office of Economic Analysis and Portland State Population Research Center – Population (and economic) coordination per State regulations
- Local Governments – coordination per State regulations
- Stakeholders (academics and non-governments) – collaboration and consensus building

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major project deliverables/milestones* sections.

Funding History:

Please note that due to modifications to the organizational chart and funding structure for the Research Center, the budget for Economic and Land Use Forecasting has increased and been split across two programs: Maintenance vs. Development & Application. This increase reflects primarily a change in funding source for existing staff rather than a net increase of staff or staff time.

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 96,822	PL	\$ 65,417
Interfund Transfers	\$ 84,464	Metro	\$ 115,869
TOTAL \$	181,286	TOTAL \$	181,286

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.668
TOTAL	0.668

Travel Forecast Development & Application Program

Staff Contact: Chris Johnson, chris.johnson@oregonmetro.gov

Description:

The Travel Forecast Development and Application Program includes work elements necessary to keep the travel demand model and various ancillary tools responsive to issues and trends that emerge during the regional transportation planning process. The major work activities and projects within this program area include travel behavior surveys, new models/tools, and significant one-time model application and/or enhancement efforts.

The program area is critical because the travel demand model provides the analytical foundation for transportation policy and investment decisions

Objectives:

The Federal Highway Administration (FHWA), Federal Transit Administration (FTA), and Environmental Protection Agency (EPA) require that project modeling be carried out using methods, techniques and tools that meet certain guidelines. Failure to meet the guidelines may result in analytical conclusions that do not meet Federal approval.

Thus, the primary objective for this program is to ***ensure the validity and utility of the modeling methods, techniques and tools***. This is achieved through the work elements listed under the Travel Behavior Surveys, New Models, and significant one-time model application/enhancement categories.

Previous Work (conducted under single Model Development program area):

Travel Behavior Surveys

- The last comprehensive travel behavior survey for this region was conducted in 2011. The data serves as a basis to understand the degree to which various stimuli (demographics, urban form, cost, travel time, lifestyle choices, etc.) affect traveler behavior and choices.

New Models

- **Activity Based Model:** A new dynamic activity based model has been developed for this region. Results from the 2011 travel behavior survey were used in the model estimation.
- **Trip Based Model (current model):** The trip-based models was re-estimated to better reflect behavior patterns and choice characteristics derived from the household travel behavior survey data. In addition, the model was updated to a 2015 base year.
- **Freight Model:** A SHRP2 C-20 IAP grant was awarded to Metro. A consultant team was contracted to assist with the project. A prototype model framework was implemented using national data. Additional data was collected local data from establishments, logistic firms, and other sources. These data were used to refine the prototype model to ensure that it more closely reflects the conditions in Portland. To meet the match requirement, Metro performed various tasks throughout the project (e.g., national zonal definition and network coding).

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- Bike Routing Algorithm: The routing algorithm is being reviewed and re-evaluated to potentially include a variety of simplifying features to ease the application of the tool by external partners such as the City of Portland.
- Multi-Criterion Evaluation (MCE) Toolkit: The MCE Toolkit consists of three tools: a benefits calculator to determine monetized benefits of transportation projects based on outputs from the regional travel demand model, a project costing tool, and a visualizer that calculates B/C ratios, and summarizes and visualizes results. Phase I of the MCE project was completed in FY2017.
- Housing+Transportation Cost Index. Modeling program staff collaborated with Land Use team staff to prototype a H+T cost “viewer” for both current and forecast states of the regional land markets and transport system.

Model Maintenance

- Modeling Network Attributes: Metro modeling staff reviewed and updated the modeling network assumptions (e.g., uncongested speeds, vehicle throughput capacities, transit line itineraries). These attributes were incorporated into a master network database system.
- Travel Demand Model Input Data: Model input data was reviewed and updated. Variables such as intersection densities, household and employment accessibility, and parking cost assumptions were adjusted to reflect 2015 conditions.
- Travel Demand Model Computer Code: Model application code was refined to address specific needs (e.g., model application interface, code changes required by the model re-estimation)

Statewide and National Professional Engagement

- Oregon Modeling Steering Committee: Staff participated on the OMSC Executive Committee and several affiliated subcommittees.
- Transportation Research Board Committees: Staff served on the TRB Transportation Planning Applications Committee. This committee is instrumental in providing a forum for advancing model application guidelines.

Methodology:

The following methods will be applied to achieve the objectives of the Travel Forecast Development Program:

Travel Behavior Surveys

- 2020 Travel Behavior Survey: Preliminary planning is underway for the next regional travel behavior survey. Additional research will be necessary to ensure that the survey will capture traditionally relevant as well as emerging behavior (e.g., extent of Uber/Lift substitution in place of other travel modes), and be conducted in a comprehensive and cost effective manner. New and emerging data collection methods (e.g., Sidewalk Labs Replica data, longitudinal or rolling surveys, mobile phone apps, personal GPS devices, etc.) will also be investigated to help ensure that the survey effort is well positioned to capture rapidly changing trends in personal travel behavior. Metro will likely partner with other Oregon modeling agencies as well as the Southwest Regional Transportation Council to maximize the geographic span and cross agency utility of the data. It is critical that the work begin now to ensure

that proper budgetary considerations and coordination with Metro planning staff are conducted in a timely manner.

New Models

- Activity Based Model: Key efforts in FY2018 will include the development of staff expertise, model validation and sensitivity testing, and the derivation/implementation of a tool acceptance program. Given the rapidly changing personal travel landscape, it will be critical to ensure that the activity-based model framework is analytically positioned to overcome the methodological shortcomings of the current trip-based model and can be adapted to explicitly represent evolving travel behavior (e.g., travel via Uber/Lyft and connected/automated vehicles) or new near-horizon advances in technology (e.g., connected and automated vehicles). Modeling staff will coordinate closely with Metro planning to ensure that activity-based model frameworks is analytically aligned with anticipated policy questions.
- Freight Model: The SHRP2 C20 project was completed and the grant was closed out during the fall of 2017. Work will continue to integrate the model with the trip-based and activity-based passenger models. Modeling staff will continue to coordinate closely with Metro planning to ensure that new freight model is able to answer the analytical questions posed from the freight planning perspective (e.g., type and value of commodities by corridor and facility).
- Multi-Criterion Evaluation (MCE) Toolkit: Phase II is anticipated to conclude in the spring of 2018. Phase II scope will add travel demand model and MCE toolkit workflow enhancements; test each benefit and test a bundle of benefits together in one scenario; improve methods for measures such as safety, physical activity and auto ownership benefits; stakeholder outreach support; and upgrade the visualizer to be fully-featured and web-accessible. A key analytical feature of the MCE toolkit is its ability to identify potential benefits and/or disbenefits that have implications for equity considerations. Modeling staff will coordinate with Metro planning staff to ensure that the MCE continues to be fine-tuned and ready to address policy questions related to equity.

Model Application/Enhancements

- Trip Based Model (Kate): The *Kate* model was validated and finalized during FY2017. This model platform will serve as a basis to initiate further enhancements.
- Bike Routing Algorithm: Based upon information gathered in FY2016, the routing algorithm may be refined to facilitate its use. Staff will work with the City of Portland to test and evaluate the refined model.
- Reliability: Based upon federal research conducted in this region (SHRP2 L35, L04), methods to integrate the aspect of system reliability will be incorporated into the model
- One-time model applications may include:
 - Regional Transportation Plan
 - SW Corridor
 - Regional Mobility Atlas
 - MTIP
- One-time model enhancements may include:
 - Update school mode choice model
 - Park & ride adjustments, shadow pricing refinements

- Area specific peaking factors
- External model modifications
- Journey level transit
- Capacitated transit
- Conversion to Modeler
- Airport model

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Travel Behavior Surveys

- 2020 Travel Behavior Survey: A committee will be set up through the Oregon Modeling Steering Committee to identify key activities and initiate a survey work plan and schedule. Metro staff will chair the committee. The survey implementation plan will be documented. (Q 1-4)

New Models

- Activity Based Model: Functional CT-Ramp activity-based model. Documentation that summarizes the validation and sensitivity testing methodology and results. (Q4). Continued meetings with regional modelers to share the validation and sensitivity testing results. (Q 4).
- Freight Model: Final documentation and validation. Integration within passenger model frameworks (Q1)
- Multi-Criterion Evaluation (MCE) Toolkit: Completion of Phase II. Tested and functional MCE Toolkit (Q2)

Model Applications/Enhancement

- Trip Based Model: Final documentation that reflects the refinements made to the model. (Quarter 1). Implementation of additional improvements (e.g., 24-hour transit, journey-level transit assignment algorithm, etc.) on as-needed basis (Q4).
- Bike Routing Algorithm: Documentation that reflects the refinements (if any). (Q1)
- As part of the “MPO data plan” mentioned in the Data Management, Data Visualization, and Performance Measurement section of this document staff will work with planning staff to devise policies and work plans to promote acquisition and use of data from “transportation network companies” (e.g. Uber and Lyft) and the coming generation of connected/automated vehicles (CAVs).

Entities Responsible for Activity:

Survey and Research

- Metro- Product Owner/Lead Agency

New Models

Metro – Product Owner/Lead Agency

- Freight model work in collaboration with the Port of Portland and ODOT
- MCE Toolkit

Model Applications/Enhancements

- Metro – Product Owner/Lead Agency

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Planned Milestones* section.

Funding History:

The travel demand model must be kept current and robust to remain a viable tool for analyzing future travel condition. The confidence level of the model must be such that it can ensure the provision of sound information for policy and investment decisions. Thus, the Travel Forecast Development & Application program is funded each year to meet that need. Key areas within the program include the collection and analysis of data (Survey and Research), the development of new modeling tools (New Models), and significant one-time model enhancements.

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 278,340	PL	\$ 505,473
Interfund Transfers	\$ 242,815	ODOT Support	\$ 15,682
<hr/>		<hr/>	
TOTAL	\$ 521,155	TOTAL	\$ 521,155

Full-Time Equivalent Staffing

Regular Full-Time FTE	<u>2.111</u>
TOTAL	2.111

Corridor Refinement and Project Development (Investment Areas)

Staff contact: Malu Wilkinson, Malu.Wilkinson@oregonmetro.gov

Description:

The Investment Areas program works with partners to develop shared investment strategies that help communities build their downtowns, main streets and corridors and that leverage public and private investments that implement the region's 2040 Growth Concept. Projects include supporting compact, transit oriented development (TOD) in the region's mixed use areas, conducting multijurisdictional planning processes to evaluate high capacity transit and other transportation improvements, and integrating freight and active transportation projects into multimodal corridors.

The Investment Areas program completes system planning and develops multimodal projects in major transportation corridors identified in the Regional Transportation Plan (RTP) as well as developing shared investment strategies to align local, regional and state investments in economic investment areas that support the region's growth economy. It includes ongoing involvement in local and regional transit and roadway project conception, funding, and design. Metro provides assistance to local jurisdictions for the development of specific projects as well as corridor-based programs identified in the RTP.

Metro has traditionally participated in local project-development activities for regionally funded transportation projects. In recent years, the Project Development program has focused on projects directly related to completion of corridor refinement planning and project development activities in regional transportation corridors outlined in the RTP. Project Development funding is also required to fund work on major projects that occurs prior to a formal funding agreement between Metro and a jurisdiction, such as project scoping, preparation of purpose and need statements, development of evaluation criteria, and developing public involvement plans. This program coordinates with local and state planning efforts to ensure consistency with regional projects, plans, and policies. It will also support initiation of new corridor planning efforts to be led by Metro or others.

Objectives:

- Ensure consistency with regional plans and policies related to major transportation corridors by participating in local planning and project development activities, including technical advisory committees, workshops and charrettes, as well as provide formal comment on proposed projects. (ONGOING)
- Implement the Mobility Corridor Initiatives strategy outlined in the RTP through monitoring ongoing planning activities and working with other jurisdictions to initiate new corridor efforts. (ONGOING)
- Advance transit projects identified in the High Capacity Transit Plan as part of the RTP (ONGOING)
- Participate in the development of projects not yet funded by other grants or contracts. (ONGOING)

Previous Work:

This work program has included two regional corridor refinement work prioritization processes of the corridor refinement work plan (in 2005 and in 2009). It has also including scoping, grant application and other start up activities of many studies including the 2005 Highway 217 Corridor study, the Eastside Streetcar project, I-405 loop study, I-5/99W, Sunrise Corridor, Damascus TSP/Highway 212 and Sunrise Parkway refinement plans and the Columbia Crossing Project.

In FY 2013-14, the program provided support for the SW Corridor and East Metro Corridor Plans.

Accomplishments in FY 2013-2014 are:

- Advanced East Metro Connections Plan priority projects toward implementation. (August 2012 through present)
- Secured funding through a competitive process from the Strategic Highway Research Program (SHRP 2) to pilot decision support tool, Transportation for Communities - Advancing Projects through Partnerships. (August 2012 to January 2013)
- Partnered with community organizations, jurisdictions and agencies within the Powell-Division Transit and Development Project study area to lay the groundwork for the planning and policy decision phase. (January 2013 to January 2014)
- Advanced the Southwest Corridor Shared Investment Strategy towards implementation and initiated the Southwest Corridor Refinement Phase to narrow the transit options considered in the corridor (2013)
- Conducted public engagement in conjunction with the Southwest Corridor Shared Investment Strategy. (March 2013 to July 2013)

In FY 2014-15, the program provided support for the SW Corridor and Powell-Division Transit and Development Project Corridor Plans.

Accomplishments in FY 2014-2015 are:

- Advanced East Metro Connections Plan priority projects toward implementation. (August 2012 through present)
- Partnered with community organizations, jurisdictions and agencies within the Powell-Division Transit and Development Project study area to establish a Steering Committee. (February 2014 to present)
- Defined a shared investment strategy including definition of a bus rapid transit project to forward into FTA Project Development. (2014)
- Advanced the Southwest Corridor Shared Investment Strategy towards implementation and narrowed the range of options for a high capacity transit investment for further study (2014)
- Developed a collaborative funding strategy with contributions from nine project partners to define a Preferred Package by May 2016 that includes a prioritized set of roadway, bicycle and pedestrian improvements and a definition of a high capacity transit investment that includes mode, terminus and alignment options for further study (September 2014 to present)

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In FY 2015-16, the program provided support for the SW Corridor and Powell-Division Transit and Development Project Corridor Plans.

Accomplishments in FY 2015-2016 are:

- Partnered with community organizations, jurisdictions and agencies within the Powell-Division Transit and Development Project study area to continue a Steering Committee. (February 2014 to present)
- Entered into Project Development for Powell Division BRT with FTA as a Small Starts Project. (2015)
- Developed an approach for shared funding for the Powell-Division BRT project to move through FTA Project Development. (2015-2016)
- Further narrowed the range of alignment options for high capacity transit in the Southwest Corridor for further study (2015)
- Conducted public engagement in to further refine and implement the Southwest Corridor Shared Investment Strategy (January 2015 to present)

In FY 2016-17, the program provided support for the Division Transit Project and Southwest Corridor Light Rail Project and the Southwest Corridor Plan and Shared Investment Strategy.

Accomplishments in FY 2016-17 include:

- Worked with TriMet and ODOT to define and develop new projects in priority high capacity transit (HCT) or Mobility Corridors. These could include on-street bus rapid transit projects or urban circulators. (ONGOING)
- Worked with local jurisdictions in regional HCT priority corridors to develop land use plans that support the System Expansion Policy elements of the RTP. (ONGOING)
- Supported local project development efforts on mobility corridors. (ONGOING)
- Completed local and regional plan amendments (2016-2017)
- Continued to support the Division Transit project (ONGOING)
- Continued to support the SW Corridor Shared Investment Strategy and Transit project (ONGOING)
- Supported the Regional Transit Strategy (2016-2017)
- Launched a new economic investment area (2016-2017)

In FY 2017-18, the program provides support for the Division Transit Project and Southwest Corridor Light Rail Project and the Southwest Corridor Plan and Shared Investment Strategy and the study of an Enhanced Transit Corridor approach for the region.

Accomplishments in FY 2017-18 include:

- Worked with TriMet and ODOT to define and develop new projects in priority high capacity transit (HCT) or Mobility Corridors. These could include on-street bus rapid transit projects or urban circulators. (ONGOING)
- Worked with local jurisdictions in regional HCT priority corridors to develop land use plans that support the System Expansion Policy elements of the RTP. (ONGOING)
- Supported local project development efforts on mobility corridors, including supporting the study of an Enhanced Transit Corridor approach for the region. (ONGOING)
- Continued to support the Division Transit project (ONGOING)
- Continued to support the SW Corridor Shared Investment Strategy and Transit project

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(ONGOING)

- Continued support for the Regional Transit Strategy as part of the 2018 RTP Update (2017-2018)
- Worked with jurisdictions and community partners in a new economic investment area along McLoughlin Boulevard (ONGOING)

Methodology:

Metro participates in local project-development activities for regionally funded transportation projects. In addition, as provided by the State Transportation Planning Rule (TPR), Metro is required to complete a regional Transportation System Plan that identifies the need for transportation facilities and their function, mode, and general location. The 2000 RTP called for completion of 18 specific corridor refinements and studies for areas where significant needs were identified but that required further analysis before a specific project can be developed. Section 660-012-0025 of the TPR requires prompt completion of corridor refinements and studies.

In winter 2005, Metro again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the consultation, in winter 2005-06, JPACT and Metro Council approved a corridor planning work plan update, which called for initiation of five new corridor plans in the next five years. In winter 2007-08, Metro commenced work on one of the corridor planning efforts identified in that work program, the Regional High Capacity Transit System Plan.

In fall 2009, Metro worked with technical committees and local jurisdictions to prioritize the five remaining corridors, and develop a phased approach to accomplish all remaining refinement plans by 2020. During that process, Mobility Corridor #15 (East Multnomah County connecting I-84 and US 26) and Mobility Corridors #2 and #20 (in the vicinity of I-5/Barbur Blvd, from Portland Central City southward to approximately the "Tigard Triangle") have emerged as strong candidates for corridor refinement planning in terms of technical factors, as well as local urgency and readiness.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Work with TriMet and ODOT to define and develop new projects in priority high capacity transit (HCT) or Mobility Corridors. These could include on-street bus rapid transit projects or urban circulators. (ONGOING)
- Work with local jurisdictions in regional HCT priority corridors to develop land use plans that support the System Expansion Policy elements of the RTP. (ONGOING)
- Continue to support local project development efforts on mobility corridors and enhanced transit corridors. (ONGOING)
- Continue to support the Division Transit project (ONGOING)
- Continue to support the SW Corridor Shared Investment Strategy and Transit project (ONGOING)
- Work with jurisdictions and community partners in a new economic investment area in the Columbia Corridor (ONGOING)
- Continue support for the Regional Transit Strategy as part of the 2018 RTP Update (2017-2018)
- Work with jurisdictions and community partners in a new economic investment area along McLoughlin Boulevard (ONGOING)

II. MPO PLANNING PROJECTS

Entities Responsible for Activity:

- Metro – Lead agency
- TriMet – cooperate/collaborate
- ODOT – cooperate/collaborate
- Multnomah, Clackamas and Washington Counties – cooperate/collaborate
- Other Local Cities – cooperate/collaborate

Schedule for Completing Activities:

These activities are ongoing and continue each year. The focus shifts depending on the major activities to be supported in the Investment Areas section and with updates to the Regional Transportation Plan.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2010-11	\$141,080	0.89
2011-12	\$155,681	0.865
2012-13	\$149,211	1.02
2013-14	\$343,290	1.745
2014-15	\$282,228	1.315
2016-17	\$112,589	0.5

FY 2017-18 Cost and Funding Sources:

Requirements:

Personal Services	\$	64,893
Interfund Transfers	\$	26,500
Materials and Services	\$	3,350

Resources:

STBG	\$	85,013
Metro	\$	9,730

TOTAL	\$	94,743		TOTAL	\$	94,743
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Full-Time Equivalent Staffing

Regular Full-Time FTE	0.5
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TOTAL	0.5
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II. MPO PLANNING PROJECTS

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 394,878	Regional Corridor Planning STBG	\$ 432,984
Interfund Transfers	\$ 174,502	STBG	\$ 136,563
Materials and Services	\$ 821,985	Metro	\$ 76,040
		Other Anticipated Funds	\$ 745,777
TOTAL \$ 1,391,364		TOTAL \$ 1,391,364	

Full-Time Equivalent Staffing

Regular Full-Time FTE	2.85
TOTAL	2.85

Division Transit Project (Powell/Division Transit and Development Project)

Staff contact: Elizabeth Mros-O'Hara, Elizabeth.Mros-OHara@oregonmetro.gov

Description:

The Powell/Division Corridor Transit Implementation Plan coordinates land use and transportation planning efforts for an investment strategy that defines a transit project for a Small Starts application (the Division Transit Project), develops supportive land use actions and identifies and prioritizes related projects to stimulate community and economic development. The transit project would connect several low income areas with major education and workforce training sites including Portland State University, Oregon Health & Science University, Portland Community College and Mount Hood Community College as well as Portland and Gresham job centers. This corridor extends from Central City Portland east to Gresham in the vicinity of Powell Boulevard and Division Street.

Based on a transit alternatives assessment and public input, the project steering committee recommended a Locally Preferred Alternative (LPA) for the transit project that includes the transit mode (bus rapid transit), the route (from downtown Portland on the transit mall to Southeast Division Street to the Gresham Transit Center, and the general stop locations (approximately 1/3 mile apart). In addition, the project partners identified land use actions and station area investments that would support livable communities in the corridor and included them in the City of Portland and City of Gresham Local Action Plans. Outcomes of these efforts will be implemented by local jurisdictions. The transit alternatives assessment is continuing into the conceptual design which is further defining the bus service and amenities, and other transit and associated pedestrian, bicycle and roadway improvements needed to provide high quality and high capacity transit service in this corridor. This process provided the foundation for TriMet's successful application to enter into Project Development with the Federal Transit Administration and sets the stage for a future Small Starts funding application and the initiation of environmental approvals under the National Environmental Policy Act (NEPA).

Based on outreach and analysis, the Steering Committee recommended a Locally Preferred Alternative (LPA) in November and the LPA was adopted by the local jurisdictions in December 2016. The project began the NEPA process by documenting potential impacts and benefits in accordance with federal requirements and began the NEPA process in earnest as the design is further refined in 2017 and 2018.

With local adoption of the LPA, TriMet is leading the design, traffic, and outreach with support from Metro and other project partners. Metro Council adopted the LPA at the same time they amended the Regional Transportation Plan in June 2017.

TriMet is leading the outreach with Metro collaboration to gather input on how to further refine the LPA. The project's conceptual design is being further developed, and Metro is leading the NEPA process by conducting a Documented Categorical Exclusion.

The land use investment strategy pieces are being led by the local jurisdictions which have adopted Local Action Plans outlining their vision for implementing land use and economic development that complements the transit investment of the Division Transit Project.

Objectives:

- Develop a transit solution that efficiently serves high demand corridor in the near term while recognizing the limited local capital and operational funding for near term implementation.
- Develop a Powell/Division Corridor community investment strategy that identifies and prioritizes needed projects to serve locally desired land uses and stimulate community and economic development centered on a transit line.
- Establish agreements on local, regional and state actions to support implementation of the community investment strategy.
- Develop multimodal solutions that distribute both benefits and burdens of growth, support active lifestyles and enhance the natural environment.
- Actively engage public in developing the criteria to prioritize transportation investments and land use changes.
- Conduct transit alternatives assessment to determine the best mode, alignment, associated service changes and capital improvements of a high capacity bus route.
- Initiate environmental approvals under the National Environmental Policy Act (NEPA).
- Incorporate refined transportation planning project into RTP.

Previous Work:

Multi-modal Corridor Refinement

The 2000 Regional Transportation Plan (RTP) identified a significant transportation need in 18 corridors but specified that additional work was needed before a specific project could be implemented. In FY 2000-01, the Corridor Initiatives Program prioritized completion of the corridor plans and refinements. Per that recommendation, Metro initiated and led corridor studies including the Powell/Foster corridor. The phase I Powell/Foster plan was completed and the findings were adopted by JPACT and the Metro Council in FY 2003/04.

In winter 2005, Metro again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the consultation, in winter 2005/06, JPACT and Metro Council approved a corridor planning work plan update, which called for initiation of five new corridor plans in the next five years. In winter 2007/08, Metro commenced work on one of the corridor planning efforts identified in that work program, the Regional High Capacity Transit System Plan.

As part of the regional Transportation Plan update, in 2009, Metro worked with technical committees and local jurisdictions to identify and prioritize remaining corridor needs. Five corridors were found to need refinements and a phased approach was established to accomplish all remaining refinement plans by 2020. Mobility Corridor #15 (East Multnomah County connecting I-84 and US 26) and Mobility Corridors #2 and # 20 (in the vicinity of I-5/Barbur Blvd, from Portland Central City southward to approximately the “Tigard Triangle”) were designated as the next priorities based on technical factors, as well as local urgency and readiness.

The East Metro Connections and Southwest Corridor Plans commenced shortly thereafter and were completed in June 2012 and commenced in December 2012, respectively. The East Metro Connections Plan includes a study of bus service issues, including bus rapid transit (BRT) route from central Portland to Mount Hood Community College within the Powell / Division corridor.

High Capacity Transit Corridors

In July 2009, the Metro Council adopted the Regional High Capacity Transit (HCT) System Plan. The HCT plan identifies and prioritizes corridors for implementation based on a set of evaluation criteria consistent with the goals of the RTP and the region's 2040 growth concept. The HCT plan was adopted by the region as part of the Regional Transportation Plan in June 2010. In July 2011, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council adopted the High Capacity Transit System Plan Expansion Policy guidelines to further describe the process for moving projects forward.

Both the HCT plan and the system expansion policy identify Portland Central City to Gresham in the vicinity of Powell Corridor as a Near-Term regional priority corridor. The rigorous HCT process included the application of 25 evaluation criteria approved by the Metro Council and Joint Policy Advisory Committee on Transportation. System Expansion policy targets were applied to both the Southwest and Powell corridors. While on many measures such as transit supportive land use and community support, regional network connectivity and integrated transportation system development, the corridors scored equally, Powell measured higher in Housing and Transportation Affordability Benefit and Region 2040 Connections. The Southwest corridor scored higher on TOTAL corridor ridership and funding potential. Both corridors are currently moving forward with collaborative efforts with local, state and regional partners.

East Metro Connections Plan

The East Metro Connections Plan (EMCP) included a recommendation for future study of HCT in the Powell/Division Corridor. A BRT in the Powell/Division corridor has strong regional and jurisdictional support. The recommendations from the EMCP study included detailed transit findings from the analysis and near term implementation plans.

Methodology:

This project builds on previous work including the Powell/Foster study (Metro, 2004), the Outer Powell Boulevard Conceptual Design Plan (City of Portland, 2011) and the East Metro Connections Plans work. In 2013-14 the project partners worked collaboratively to develop the land use and transportation scope(s) and budget(s).

The project scope will be to improve the land use and transportation conditions and mobility in the Powell/Division Corridor to support vibrant communities with transportation that helps to sustain economic prosperity, healthy ecosystems, and community assets; minimizes contributions to global warming; and enhances quality of life. This work program started with locally identified land use plans and priorities and economic development strategies. The transportation analyses will identify measures to support the land use strategies and improve mobility (particularly transit) in the corridor. Metro will be the local lead agency that will consider and compare various transit alternatives, including mode, alignment / routing, service and capital improvements, as well as a no build scenario. The work program is expected to take approximately 24-48 months to complete depending on funding and partner preferences.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Evaluation and refinement of promising options and related transportation improvements and land use investments (Summer 2014)
- Adoption of the Powell-Division Transit Action Plan by local jurisdictions and Metro Council (2015)

II. MPO PLANNING PROJECTS

- City of Gresham Local Action Plan outlining actions Gresham can take to promote desired change around future station areas complementary to the transit investment (November 2015)
- Conceptual design of transit alternative(s) (Summer 2016)
- Traffic and Transportation technical report (Summer 2016)
- Land use and development technical report (Summer 2016)
- Draft and Final Transit and Development Action Plan (Fall 2015)
- Environmental scan and initiation of NEPA class of action (Winter 2016)
- Adoption of Locally Preferred Alternative by the Local Jurisdictions (Winter 2016)
- Design refinement of Locally Preferred Alternative to 10% (Spring 2017)
- Metro adoption of the Locally Preferred Alternative and amendment to the Regional Transportation Plan (Spring 2017)
- TriMet Application for a rating to qualify for FTA Small Starts funding (Summer 2017)
- City of Portland Powell-Division Transit and Development Project Local Action Plan creating a 5-year work plan for the City to promote equity-focused community, workforce, and economic development to complement transit investment, promote affordable housing and support existing economic development activities. (Summer 2016)
- Complete Historic and Cultural Analysis (Spring 2018)
- Coordination with TriMet and partners to refine project design for analysis – 35% (Spring 2018)
- Continued coordination with TriMet and partners on project design refinement (Spring/Summer 2018)
- Coordination with local jurisdictions on land use and community development opportunities (2018-2019)
- Complete NEPA analysis (Winter 2018)

Entities Responsible for Activity:

Metro – Lead NEPA analysis/ Historic and cultural analysis and cooperate/collaborate

Oregon Department of Transportation – cooperate/collaborate

TriMet – Lead Agency after adoption of the Locally Preferred Alternative, leading design and outreach
Corridor Jurisdictions (including Cities of Portland and Gresham and Multnomah County) -
cooperate/collaborate

City of Portland- cooperate/ collaborate

City of Gresham- cooperate/collaborate

Multnomah County- cooperate/collaborate

Schedule for Completing Activities:

- Coordination with TriMet and partners to refine project design for NEPA analysis – 35% (Spring 2018)
- Complete NEPA analysis (Winter 2018)
- Complete Historic and Cultural Analysis (Spring 2018)
- Coordination with TriMet and partners to refine project design (Winter/Spring 2018)
- Coordination with local jurisdictions on land use and community development opportunities (2018-2019)

II. MPO PLANNING PROJECTS

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2012-13	\$221,775	0.96
2013-14	\$441,348	2.455
2014-15	\$771,226	2.58
2015-16	\$1,234,623	4.75
2016-17	\$2,533,045	5.85

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 520,576	Regional Corridor Planning STBG	\$ 1,122,610
Interfund Transfers	\$ 212,586	Metro	\$ 89,364
Materials and Services	\$ 1,234,610	Other	\$ 755,798
TOTAL \$ 1,967,772		TOTAL \$ 1,967,772	

Full-Time Equivalent Staffing

Regular Full-Time FTE	4.125
TOTAL	4.125

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 80,571	Regional Corridor Planning STBG	\$ 500,000
Interfund Transfers	\$ 34,215	Metro	\$ 57,227
Materials and Services	\$ 442,441		
TOTAL \$ 557,227		TOTAL \$ 557,227	

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.6
TOTAL	0.6

Southwest Corridor Plan

Chris Ford, chris.ford@oregonmetro.gov

Description:

The Southwest Corridor Plan coordinates land use and transportation planning efforts to develop a shared investment strategy that identifies and prioritizes needed projects to serve locally desired land uses and stimulate community and economic development. This corridor extends from Central City Portland south to the City of Sherwood in the vicinity of Barbur Boulevard/Highway 99W. The plan is a partnership between Metro, Washington County, the Oregon Department of Transportation, TriMet and the cities of Portland, Sherwood, Tigard, Tualatin, Beaverton, Durham, and King City. A major feature of the Plan's shared investment strategy is a proposed light rail transit (LRT) system extending from the Portland transit mall to Bridgeport Village via downtown Tigard. In conjunction with the study of the LRT, Metro is working with project partners on the Southwest Corridor Equitable Development Strategy to support achieving regional and local goals related to inclusive development, affordable housing, workforce development, and access to education and other ladders of opportunity aligned with major regional investments in transit and other transportation improvements.

Objectives:

- The proposed LRT project entered the federal environmental review process in late 2016, and it will continue until mid 2019.
- The Southwest Corridor Steering Committee will select the final LRT alignment – the locally Preferred Alternative – during the environmental review process.

Previous Work :

- In 2015-16, the project steering committee substantially narrowed the alignment options still under consideration, and recommended light rail over bus rapid transit as the transit mode.
- The SW Equitable Development Strategy began in 2017, including formation of a project oversight committee that meets bimonthly.
- In spring 2018, the Draft Environmental Impact Statement (DEIS) was released for public review and comment.
- The Southwest Corridor Steering Committee selected a Preferred Alternative for local endorsement and adoption in June 2018.

Methodology and Entities responsible :

Technical and planning staff from partners meets several times every month to examine and evaluate new information in order to brief the project steering committee, which works to make project recommendations on a consensus model. Specific partner roles include:

- Metro: lead local agency on environmental review process; support TriMet with regional coordination, analysis and public engagement
- TriMet: planning and design lead after Metro Council adoption of locally preferred alternative

II. MPO PLANNING PROJECTS

- Oregon Department of Transportation: cooperate/collaborate, including reviewing and commenting on draft NEPA materials and involvement in negotiating analysis methods and mitigation strategies
- Partner jurisdictions: same as ODOT

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19

- Adoption of the SW Corridor LRT Preferred Alternative into the Regional Transportation Plan update (October 2018)
- Metro Council considers adoption of a Land Use Final Order for the Southwest Corridor Light Rail Project (October 2018)
- TriMet submits to Federal Transit Administration for entry into Project Development phase of New Starts (December 2018)
- Begin funding commitments toward estimated capital costs by local agencies and jurisdictions (continues into 2020)
- Post-DEIS transit design advancement in support of Final Environmental Impact Statement (FEIS) (mid 2018 into early 2019)
- Preparation and release of FEIS (early to mid 2019)
- Continue to implement the work plan for the Equitable Transit Oriented Development (eTOD) grant received from the Federal Transit Administration (FTA) for corridor wide planning, culminating in identification of a comprehensive SW Corridor Equitable Development Strategy (mid 2019)
- Begin the station area planning process, examining access needs and land use and development opportunities (TBD)
- Continued ODOT and project partner staff meetings to review and discuss project planning and designs (ongoing)
- Continued public engagement process (ongoing)
- Continued collaboration with project partners to support local community land use visions (ongoing)
- Work toward identifying funding and implementation options for SW Corridor transportation improvements (roadway, bicycle and pedestrians) and parks, trails and habitat projects listed in the Southwest Shared Investment Strategy but not included in the LRT Preferred Alternative (ongoing)

Schedule for Completing Activities:

- Federal environmental review: mid 2019
- Completion of equitable development strategy: mid 2019
- Commitment of non-federal matching funds: late 2020
- Request for federal matching funds: mid 2021
- Signing full funding grant agreement with FTA: early 2022
- Start LRT construction: 2020
- Opening of LRT line: 2027

II. MPO PLANNING PROJECTS

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-12	\$2,476,000	7.615
2012-13	\$2,450,844	11.4
2013-14	\$1,956,046	11.4
2014-15	\$2,208,202	5.485
2015-16	\$3,626,399	6.05
2016-17	\$3,776,791	6.6

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 908,067	Metro	\$ 286,585
Interfund Transfers	\$ 381,788	Other	\$ 2,027,370
Materials and Services	\$ 1,024,100		
TOTAL \$ 2,313,955		TOTAL \$ 2,313,955	

Full-Time Equivalent Staffing

Regular Full-Time FTE	7.435
TOTAL	7.435

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 889,282	FTA - SWEDS	\$ 216,977
Interfund Transfers	\$ 401,493	Metro	\$ 342,486
Materials and Services	\$ 1,428,500	Other Anticipated Funds	\$ 2,159,811
TOTAL \$ 2,719,275		TOTAL \$ 2,719,275	

Full-Time Equivalent Staffing

Regular Full-Time FTE	7.15
TOTAL	7.15

II. MPO PLANNING PROJECTS

FY 2017-18 ODOT Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 150,000	SPR	\$ 150,000
<hr/>		<hr/>	
TOTAL	\$ 150,000	TOTAL	\$ 150,000
<hr/>		<hr/>	

<u>Full-Time Equivalent Staffing</u>	
Regular Full-Time FTE	1.25
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TOTAL	1.25
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Economic Value Atlas (EVA)

Staff contact: Jeffrey Raker, Jeffrey.Raker@oregonmetro.gov

Description:

The purpose of this work is to create a more robust data-based tool for estimating economic outcomes from public investments in transportation and other infrastructure investment scenarios. Metro, together with key partners and stakeholders, will develop an Economic Value Atlas (EVA) that serves as a spatial representation of existing economic and workforce conditions, opportunities for a productive and inclusive regional economy, and supply chain factors that impact the region's ability to export its products and services. The EVA will help translate stated economic goals for the region into a strategy that guides Metro's transportation (freight and passenger) and land use planning and investment decisions based on economic conditions and needs.

Objectives:

- Create a common understanding of the Portland–Vancouver region's economic conditions and economic and workforce development performance needs.
- Develop enhanced economic data, geospatial information, metrics for economic performance, and related decision-support tools.
- Engage key economic and workforce development organizations as well as other stakeholders in evaluating conditions and metrics for stated economic aspirations:
 - Infrastructure and land use assets/opportunities.
 - Efficient movement of goods, services, and people.
 - Traded-sector jobs and productivity.
 - Exports and supply chain conditions.
 - Broader economic performance.
 - Economic inclusion/opportunity.
- Use the EVA to inform Metro's planning and investment decisions and external strategies and actions to support economic and workforce development in the region.

Previous Work:

The Economic Value Atlas builds on and enhances current and previous work completed by Metro and its partners, including:

- Metro plans and initiatives:
 - Urban Growth Report and Metro Investment Areas Division projects
 - Regional Industrial Site Readiness project (2014)
 - Regional Transportation Plan (RTP), Regional Freight Plan, 2014 Cost of Congestion Report, and 2008 Regional Infrastructure Analysis.
- External Plans and Initiatives
 - Greater Portland Inc. (GPI) Comprehensive Economic Development Strategy, Greater Portland 2020 Action Plan, and Metropolitan Export Initiative + 2012 Export Plan
 - Prosper Portland Strategic Plan and cluster projects
 - Value of Jobs Coalition reports
 - Port of Portland plans and studies
 - State Business Oregon and Brownfields programs

Methodology:

Metro serves as project manager for this effort, with significant support from Greater Portland Inc., Port of Portland, City of Portland and Business Oregon. Phases of the project include:

- Phase 1 - Engagement + Partner Development
 - Economic Development Listening Tour
 - Establish Working Group
 - Expert Input on Cluster + Cross-Sector Challenges + Options
 - Staff Participation In Key economic and workforce development partner meetings and events
- Phase 2 - Regional Economic Analysis
 - Coalesce + Establish Economic Indicators
 - Visual/Spatial Mapping of Regional Economy + Clusters
 - Economic Value Atlas
- Phase 3 –Guidance on Metro Plans + Initiatives
 - Use EVA to ID Future Investment Areas
 - Integrate Findings Into RTP + MTIP
 - Integrate metrics/criteria into 2019-2020 RFFA
 - Integrate analyses/findings into future multi-criteria evaluation
- Prospective Future Phases – Guidance on external policy/actions, advance cluster- specific and cross-sector action plan(s), and build out ongoing Metro role in economic and workforce development.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Economic Value Atlas – Online Decision-Support Tool (SECOND QUARTER FY 2018-19)
- Implementation Plan – Guidance on Metro Plans + Initiatives (SECOND QUARTER FY 2018-2019)
- Stakeholder engagement (ONGOING)

Entities Responsible:

- Metro – Lead Agency
- ODOT – Contract Manager
- Greater Portland Inc – Collaborate/Cooperate
- Port of Portland – Collaborate/Cooperate
- City of Portland – Collaborate/Cooperate
- Business Oregon – Collaborate/Cooperate
- Joint Policy Advisory Committee (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Transportation Policy Alternatives Committee (TPAC)

Metro Technical Advisory Committee (MTAC)

Schedule for Completing Activities:

- Listening Tour (Completed)
- Establish Working Groups – EVA Task Force + Technical Work Group (Completed)
- Site Tours (3 Completed + 2 scheduled)
- Market Scan (Completed)
- Final Economic Performance Indicators (THIRD QUARTER FY 2017-2018)
- Early Mapping (THIRD QUARTER FY 2017-2018)
- Economic Value Atlas – Online Decision-Support Tool (SECOND QUARTER FY 2018-2019)
- Implementation Plan – Guidance on Metro Plans + Initiatives (SECOND QUARTER FY 2018-2019)

II. MPO PLANNING PROJECTS

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2015-16	\$325,000	0.5
2016-17	\$177,214	0.85

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 216,067	STBG – EVA	\$ 53,860
Interfund Transfers	\$ 95,058	Metro	\$ 291,265
Materials and Services	\$ 34,000		\$
			\$
TOTAL \$ 345,125		TOTAL \$ 345,125	

Full-Time Equivalent Staffing

Regular Full-Time FTE	<u>1.89</u>
TOTAL	1.89

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 209,236	STBG - EVA	\$ 25,557
Interfund Transfers	\$ 88,853	Metro	\$ 308,781
Materials and Services	\$ 36,250		
TOTAL \$ 334,339		TOTAL \$ 334,339	

Full-Time Equivalent Staffing

Regular Full-Time FTE	<u>1.75</u>
TOTAL	1.75

I-84 Multimodal Integrated Corridor Management

Staff Contact: Caleb Winter, caleb.winter@oregonmetro.gov

Description:

US DOT's Intelligent Transportation Systems (ITS) Joint Program Office (JPO) awarded Metro and agency partners an Integrated Corridor Management Deployment Planning Grant. Integrated Corridor Management (ICM) grants will help combine numerous information technologies and real-time travel information from highway, rail, transit and bike operations.

This work aligns with the Regional TSMO Plan, supporting the vision to “collaboratively and proactively manage [the region’s] multimodal transportation system.” The ICM study furthers the goals and objectives of the TSMO plan including reliability for travelers and goods movement; transportation safety and security; environment and quality of life; and, providing comprehensive multimodal traveler information to people and business.

As TSMO partners strive towards real-time information for operations and travelers, this study takes strategies a step forward. ICM is described as a “system of systems” which refers to both the technology and coordination protocols between agencies. ICMs in other regions identify a multitude of scenarios including crashes, weather hazards and major events. A real-time coordinated response will help provide safe and reliable transportation options.

Travelers can use real-time information to avoid congestion and find alternate routes or transportation systems, such as transit or bike. Shippers can receive information concerning the entire network, not just one route. Such tools can help engineers make better decisions about congestion management by recommending where traffic should flow and onto which systems commuters should be shifted based on up-to-the-second data.

Objectives

- Implement a systematic multimodal approach, complete with performance measures and evaluation approaches, in accordance with multimodal mobility corridor concepts.
- Balance mobility, safety and access considerations.
- Improve multimodal access for corridor users.
- Better manage freight mobility in the corridor.
- Leverage intelligent transportation system (ITS) technologies to become even more active and integrated.
- Balance state and local needs in transportation planning and operations.

Previous Work

Previous projects to this ICM study are those implemented under the TSMO Plan, coordinated by the TSMO Regional Mobility Program in the UPWP, and related projects by agency partners. ODOT manages and operates I-84 with a data communications network, signals, ramp meters, cameras, and

variable message signs. TriMet operates three MAX lines and bus service throughout the corridor, monitored with an updated CAD/AVL system and communications. Multnomah County manages six of the Willamette River bridges, including the Burnside, Broadway, Hawthorne and Morrison. City of Gresham shares fiber optics and will install arterial variable message signs. City of Portland operates approximately 382 signalized intersections within the proposed corridor, including 16 traffic cameras. The agencies in the corridor already cooperate to share equipment, share data and coordinate incidents from operations centers.

The TSMO Regional Travel Options (RTO) program supports transportation demand management in the corridor working with both residents and employees in Portland and Gresham to reduce drive-alone trips and increase trips by transit, biking and walking. ODOT and TriMet serve travel information at TripCheck.com and TriMet.org.

Portland State University houses and manages PORTAL, the region's database archive of traffic, transit, bike and walk data, plus operating conditions such as weather and incident data.

Methodology:

Metro will serve as project manager for this effort, with significant support from a project team from partner agencies and support through TransPort, the TSMO subcommittee to the Transportation Policy Alternatives Committee (TPAC). This project will follow the process for completing an Integrated Corridor Management Deployment Planning Grant, described in the US DOT ITS JPO guidance documents and their direction to grantees.

The project will complete the following components:

- Stakeholder Participation Plan – identifying the process to generate input and support from a cross section of stakeholders at key points in the concept development
- Project Management Plan (PMP) – preparing the ICM guiding document
- System Engineering Management Plan (SEMP) framework – preparing a structure for systems engineering as the ICM project progresses towards implementation
- Vision, Goals and Objectives - refining the desired vision, measurable goals and objectives for ICM in the I-84 corridor.
- ICM Operational Alternatives - developing an initial set of operational alternatives to achieve the desired vision, measurable goals and objectives
- Infrastructure Improvements – comparing existing/planned assets with ICM asset requirements to identify a set of improvements
- Relationships and Procedures – identifying issues and recommending actions for ICM operations
- Final Report – preparing a final document

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

Tangible products are primarily expected in FY 2017-2018; however, if additional work is desired by stakeholders to finalize the report, the date of completion will be extended.

- Final report (1ST Quarter FY2018-2019)

II. MPO PLANNING PROJECTS

Entities Responsible for ICM Activity:

- Metro – Lead Agency ODOT – Contract Manager
- ODOT, TriMet, Multnomah County, City of Portland, City of Gresham, PSU, Port of Portland, TransPort – Cooperate/Collaborate
- FHWA – Cooperate/Collaborate
- US DOT ITS JPO – Cooperate/Collaborate

Schedule for Completing Activities:

Please refer to schedule information provided in the Major Project Deliverables/Milestones section.

FY 2017-18 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 63,137	ICM-DPG-2013/ICM Deployment	\$ 191,680
Interfund Transfers	\$ 25,663	Metro	\$ 6,845
Materials and Services	\$ 150,800	Local Partners	\$ 41,075
TOTAL \$ 239,600		TOTAL \$ 239,600	

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.4
TOTAL	0.4

MAX Red Line Improvements Project

Staff contact: Elizabeth Mros-O'Hara, Elizabeth.Mros-Ohara@oregonmetro.gov
Malu Wilkinson, Malu.Wilkinson@oregonmetro.gov

Description

The MAX light rail system provides high capacity transit connecting the major centers of our region. The MAX Red Line has connected the City of Beaverton, downtown Portland, Gateway Regional Center, and Portland International Airport since 2001. Since its opening, there has been substantial growth in the corridor and more demand for reliable transit connecting these important centers. Currently, the Red Line has two single track sections near Gateway/99th Ave and Portland International Airport, which result in inbound and outbound trains having to wait for each other. If a train is off schedule, these wait times can impact the entire Max System as trains rely on the same tracks to serve different parts of the region. Adding a second set of tracks in these areas will reduce delays for riders on all five lines. In addition, Max riders west of Beaverton Transit Center have been requesting Red Line service to better connect a growing part of the region.

The Red Line improvements west of the Beaverton Transit Center include improving track and switches and adding signals and a new operator break facility at the Fair complex/Hillsboro Airport Max Station allowing Red Line trains to serve ten more west side stations. These stations are currently served by the Blue Line which is often overcrowded. Improvements will allow TriMet to increase train frequency to better meet rider demand.

Improved transit will support anticipated redevelopment at the Port of Portland such as the expansion of the Portland International Airport and potential redevelopment at the Gateway Regional Center.

Objective

Complete a 2-year design process for the Max Red Line double tracking and other improvements to increase light rail reliability on all five Max lines and to improve carrying capacity to meet transit demand west of the Beaverton Transit Center. Construct improvements in the 2021-2022 timeframe with an opening targeted for 2023. This work will improve mobility and transit performance throughout the region.

Work Completed in 2017-18 included:

- Initiation of discussions with jurisdictions and stakeholders to coordinate design and better transit access.
- Initiation of the transit design and environmental analysis.

Methodology

TriMet and Metro will work with the local jurisdictions and the Port of Portland to scope the project to improve access to major transit origins and destinations, improve reliability of the entire MAX system, and support future redevelopment at the Gateway Regional Center, the Port of Portland properties, and within Beaverton and Hillsboro.

TriMet and Metro will also consult with the federal agencies during the scoping phase.

TriMet is coordinating with local jurisdictions to avoid and minimize any potential impacts associated with improving the Red Line.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019

- Partner agency engagement began summer 2017 and will continue through 2019.
- Public outreach process began fall 2017 and will continue through 2019
- JPACT and Metro Council will be asked to adopt the MAX Red Line improvements into the 2018 RTP.
- Enter Project Development for Small Starts Federal Transit Administration Small Starts Application for Rating 2019
- 30% design by end of 2018
- NEPA complete by 2019
- Begin construction 2020/2021
- Opening 2021/2022

Entity/ies Responsible for Activity:

TriMet and Metro

Other Stakeholders

- Local Cities and Counties
- Port of Portland
- City of Portland
- City of Beaverton
- City of Hillsboro
- Federal Transit Administration

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project Deliverables/Milestones* section.

Funding History

This project is being described for the first time in this UPWP, and therefore does not include a discrete funding history.

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Personal Services	\$ 90,456	Regional Corridor Planning STBG	\$ 103,407
Interfund Transfers	\$ 38,412	Metro	\$ 25,461
TOTAL \$ 128,868		TOTAL \$ 128,868	

Full-Time Equivalent Staffing

Regular Full-Time FTE	0.7
TOTAL	0.7

TriMet Employer Outreach Program

Staff Contact: Adriana Britton, brittona@trimet.org

Description:

The TriMet Employer Outreach Program delivers transportation demand management programs and services to employers through the Metro Regional Travel Options program. TriMet's work with employers contributes toward achieving Metro's Climate Smart strategies goals.

The TriMet program serves employers and colleges of all sizes in the Portland Metro region with non-SOV travel options resources, transportation program assistance, transit pass programs and transportation surveys for Oregon DEQ's Employer Commute Options program. The TriMet outreach program reduces vehicle miles traveled by educating employers, offering promotional campaigns, meeting with employees, producing online communications and supplying educational materials for using transportation options. TriMet supplies transportation survey data in aggregate to the Metro RTO program, plus assists partners with transit operations information and opportunities to participate in TriMet campaigns.

TriMet's RTO efforts contribute to achieving Metro's regional goals of reducing greenhouse gas emissions 10 percent below 1990 levels by 2020 and 75 percent below 1990 levels by 2050. The population is expected to increase by 44% between 2010 and 2040 while increasing housing costs are displacing a segment of riders to the outer rings of the region.

TriMet increased service from 2012-2016 and service is now above pre-recession levels. TriMet has continued adding service at regular intervals through TriMet's "Making Transit Better" initiative. A TriMet analysis released Q1 17-18 shows that overall ridership, primarily off-peak trips, was relatively flat from 2015. However, commute peak trips increased slightly from 2015 to 2016. To improve off-peak transit ridership TriMet proposes adding service to address shifts in housing, addressing travel times, integrating services and monitoring demographic shifts. Within this context, outreach messaging to employers will encourage travel options as a convenient lifestyle choice for off-peak as well as for commute trips.

Objectives:

- Increase participation among employers and colleges to reduce non-SOV trips
- Promote active travel options that improve health and economic benefits
- Coordinate with and support Metro RTO campaigns plus local partner efforts
- Provide transportation services and education to employers and colleges about the variety of travel opportunities available in suburban areas and urban centers

Previous Work:

Key work program accomplishments for fiscal 2016-17 included the following:

- Increased transportation program enrollment to 2,062 from 1,956 worksites a year ago, a 5% increase over the previous fiscal year.
- Employer worksites offering transit subsidies increased to 1,291 from 1,248, a 3% increase over the previous year.

- Increased worksites with TriMet pass programs to 1,250 from 1,207 in the previous year, a 4% increase from the last fiscal year.
- Enrolled 30 new TriMet employer pass program contracts compared with 45 in the previous fiscal year or a 33% decrease in the number of new program contracts.

Methodology:

The transportation options team works with employers to develop and maintain transportation programs to reduce SOV car trips. The programs also include transit pass programs for employers and colleges to encourage transit use. Following are key program components completed in fiscal 2016-17:

Employer and College Outreach:

- Completed 5,727 contacts with 771 employers and colleges of which 110 employers were first-time contacts. The number of contacts decreased by 4% but the number of employers/colleges contacted increased by 23%.
- Participated in 331 planning, informational meetings, with employers, colleges, business associations, community associations, citizens' advisory committees and RTO partner organizations.
- Promoted the 2016 statewide Drive Less Challenge at 14 employer events with 1,500 employee contacts and by email to over 200 employers with pass programs. Distributed over 900 postcards and 50 posters at employer events and meetings.
- Promoted service improvements to follow up on outreach from TriMet's Service Enhancement Plans initiative including the following:
 - Q2 FY16-17 North Hillsboro Link Shuttle. Contacted 51 employers along new service, of these sent 350 promotional flyers to 30 employers, staffed 3 events.
 - Q4 FY16-17 new bus route, Line 97. Mailed letter about new service to over 105 West district employers and conducted call downs; supplied over 1,000 bus schedules plus supplied 429 New Employee Kits.
- Continued a campaign to improve ridership on the MAX Orange Line and related bus service launched in Q1 FY15-16. Designed a new brochure promoting Orange Line service for employers and mailed to 600 businesses in Q3-Q4 FY16-17. Outreach and follow up will continue throughout FY17-18. The mailer follows an off-peak campaign conducted April – June 2016 to increase awareness of the service and destinations in the corridor. The off-peak campaign included bus ads, billboards and a website highlighting destinations near the MAX Orange Line stations.

Employee Communications:

- Promoted transportation options at 69 employer transportation fairs to 5,859 attendees.
- Redesigned the New Employee Kit into a single, streamlined brochure Q1 FY16-17. Distributed 3,354 of the revised New Employee Kits to 188 employers to promote non-SOV travel choices to new employees. The kits are branded with the regional Drive Less Save More campaign and may be accompanied with customized materials for an employer.

Employee Transportation Surveys:

- TriMet processed Employee Commute Option surveys for 241 worksites for 110 companies. Staff assists employers with surveys free of charge whether for Oregon's DEQ program, TriMet's Universal Annual Pass program, or to inform transportation program

choices. The staff supplies results in a report with recommendations for the employer's transportation program.

Employer Transportation Programs:

- TriMet offers a free, Emergency Ride Home, cab voucher program to incentivize employers to subsidize transit. Added 19 employers with ERH programs to 168 for FY16-17 and provided 52 cab rides for FY16-17. TriMet provided 47 rides in the previous year.

Other:

- Conducted outreach to employers by email and phone on three occasions during Q2 and Q3 alerting over 150 employers about protests disrupting multiple transportation modes in Portland's central business district. Advised employers of options for employees' safety.
- Outreach in Q3 by email to 784 employers advising of a 3-week light rail construction project and options to help employees travel through the disruption. Businesses were included in a mailer to over 28,500 addresses in the project area. Staff assisted with on-street outreach during commute hours.
- In Q4 FY16-17, TriMet hosted a public, rider engagement event to leverage APTA's National Dump the Pump Day campaign. The event was paired with social media promotions and included demonstrating TriMet's newest bus. Staff assisted with transportation options questions and transit information.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19

For FY 2018-19, outreach projects will include engaging employers in a suite of service enhancements in planning for Q1 2018 through 2019. Outreach messages will encourage travel options for off-peak trips in addition to commute trips. Staff will promote Metro RTO, partners and TriMet campaigns to employers and colleges. A branding campaign is being developed for the Employer Outreach program and will be implemented beginning Q1 FY18-19. The work plan may be adjusted to incorporate new campaigns plus service additions and changes.

Employer and College Outreach:

- TriMet will continue a 10-year service expansion plan with service additions in Q1 and Q3 FY18-19 plus Q1 and Q3 FY19-20. Multiple outreach phases include engaging employers at the planning stages in FY17-18 plus following up to build awareness about the service changes with employer emails, mailings and events.
- Staff will promote RTO campaigns including national bike month and the bike commuting challenge in Q1 FY18-19 and the statewide Drive Less Challenge in Q2 FY18-19 through online channels and at employer events.
- Staff will promote new opportunities for combining bike and transit trips by leveraging the construction of three, new secure bike-storage facilities for Summer 2018. The Bike and Ride facilities will be located at major light rail transit centers.

Employee Communications:

- Promote transportation options, new bike/ped infrastructure and RTO campaigns at over 80 employer and college fairs/events with a minimum goal of 8,000 participants.
- Promote WES Commuter Rail to build ridership along corridor. Outreach will be

conducted to the 131 employers along the line from Q2 through Q4 FY17-18 to build awareness of the bike/transit connections. Outreach will include creating a mailer to zip codes ½ radius of the line, coordinating transportation fairs, Facebook ads targeting surrounding zip codes, and marketing materials to raise awareness of WES.

Employee Transportation Surveys:

- Complete an average annual goal of surveys for 230 employer worksites for FY18-19. Staff work closely with Oregon DEQ to assist employers who must survey for compliance. The survey is also used for TriMet’s Universal Annual Pass program.

Employer Transportation Programs:

- Employers and colleges are aware of the Hop Fastpass™ electronic fare system through previous outreach efforts which began Q3 FY16-17. Staff will continue transitioning employers and colleges to the Hop Fastpass system in FY18-19. As of Q2 FY17-18, 89 employer programs have transitioned to the Hop system. Over 550 programs will be transitioned to the new fare system during a two-year period, plus information will be supplied to train employees to use the electronic fares for riding the system. Additional TriMet staff (non-RTO) will conduct training for employers and colleges.
- Staff will promote the Emergency Ride Home program with the goal of adding a minimum of 12 enrollments annually over the next five years.

Other:

- Staff will assist with a pilot project to encourage commute and off-peak transit trips at new multi-family housing developments with 50 or more units within .25 miles of frequent transit. A New Resident Kit was created that includes transit fares and transit tips. An initial set of 3,500 kits was mailed in Q1 FY16-17 to 60 buildings. Another 5,000 kits will be distributed in Q1-Q4, FY18-19. The second cohort will include the Hop Fastpass™ electronic card to allow reporting of card activations.

Entities Responsible for Activity:

The TriMet Employer Outreach program is staffed by 5.25 people within TriMet’s Customer Information Services department. TriMet staff work in partnership with the following stakeholders and entities:

- Metro Regional Travel Options
- ODOT
- FTA
- Regional partner agencies including TMAs
- Employers and colleges in the Metro region
- Cities and counties in the Metro region
- Metro Transportation Policy Alternatives Committee (TPAC)
- Metro Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Other area transit providers, including but not limited to South Metro Area Regional Transit, C-TRAN and Portland Streetcar.

III. OTHER REGIONAL PLANNING PROJECTS

Schedule for Completing Activities:

Please refer to the schedule information provided in the *Major Product Deliverables* sections.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2008-09	\$412,409	5.25
2009-10	\$424,781	5.25
2010-11	\$437,524	5.25
2011-12	\$450,649	5.25
2012-13	\$464,171	5.25
2013-14	\$469,118	5.25
2014-15	\$483,193	5.25
2015-16	\$497,688	5.25
2016-17	\$507,212	5.25
2017-18	\$546,270	5.25

FY 2017-18 Costs and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	527,997	PL	\$	
Interfund Transfers	\$		STP	\$	473,772
Materials and Services	\$	18,273	ODOT Support	\$	
Computer	\$		Section 5303	\$	
CMAQ	\$		*TriMet Support (10.27% match)	\$	54,225
			Metro	\$	
			Other	\$	18,273
TOTAL	\$	546,270	TOTAL	\$	546,270

III. OTHER REGIONAL PLANNING PROJECTS

Full-Time Equivalent Staffing

Regular Full-Time FTE		5.25			
<i>TOTAL</i>		5.25			

**Updated M&S for FY17-18, actual as of 7/3/2017.

FY 2018-19 Costs and Funding Sources:

Requirements:			Resources:		
Personal Services	\$	538,101	PL	\$	
Interfund Transfers	\$		STP	\$	487,985
*Materials and Services	\$	14,000	ODOT Support	\$	
Computer	\$		Section 5303	\$	
CMAQ	\$		TriMet Support (10.27% match)	\$	50,116
			Metro	\$	
			Other	\$	14,000
<i>TOTAL</i>	\$	552,101	<i>TOTAL</i>	\$	552,101

Full-Time Equivalent Staffing

Regular Full-Time FTE		5.25			
<i>TOTAL</i>		5.25			

*Estimated M&S for FY18-19 to be updated with actual M&S in next UPWP.

South Metro Area Regional Transit (SMART) Options Program

Staff Contact: Elli Work [Primary] ,Grants and Programs Manager, work@ridesmart.com
Nicole Hendrix [Secondary], Transit Management Analyst, hendrix@ridesmart.com

Description

South Metro Area Regional Transit (SMART)'s Transportation Demand Management (TDM) program, SMART Options, promotes transportation alternatives to driving alone and assists local employers in establishing transportation worksite programs to comply with Department of Environmental Quality Employee Commute Options (DEQ – ECO) rules. The SMART Options program takes part in coordinated regional travel planning processes through Metro's Regional Travel Options (RTO) Program in addition to collaborating with neighboring area transit agencies and jurisdictions in planning outreach programs and promotions. Beginning in 2001 primarily as a large-employer commuter focused program, SMART Options continues to expand to include community members and visitors in an effort to reduce single occupancy vehicle trips in Wilsonville and the region.

Objectives

- Reduce drive alone trips and increase awareness of transportation options;
- Increase outreach to Limited English Proficiency (LEP) and older adult populations;
- Build transit ridership on SMART, TriMet, CAT, and Cherriots;
- Improve first and last mile connections to transit;
- Work with Wilsonville employers to coordinate commuter vanpools;
- Help achieve regional and state plan goals utilizing strategies in plans; and
- Support the City of Wilsonville's Transit Master Plan and Bicycle and Pedestrian Master Plan.

Previous Work

- In the Spring of 2017, SMART purchased and placed a new Dero bike repair station adjacent to the 48 bicycle lockers located at SMART Central at Wilsonville Station to allow for a more seamless first/last mile connection and build multi-modal transportation.
- Summer marketing interns assisted in vastly improving outreach on SMART social media sites. On Facebook, SMART followers grew from 300 to over 1,000 in two months.
- Coordinated with Ride Connection to promote the new RideWise Travel Trainer located at SMART offices beginning December 2016.
- Walk Smart's Walk at Lunch program occurred weekly from April through September 2017. Average participation each week was 35 people, partnering with 17 Wilsonville businesses.
- A Grants and Programs Manager was hired in June 2017 to bring funding and reports up to date.
- In August 2017, SMART conducted its first on-board demographic survey. 500 surveys were collected over the course of four days. The results of the survey are being used to better market services and adjust service-based customer trends.
- Assisted 11 employers to complete their ECO surveys and trip reduction plans when required by DEQ from July 2016 to June 2017.

Methodology and Entities Responsible

The SMART Options program will continue to work closely with and report to Metro’s Regional Travel Options program and relevant working groups to coordinate travel options outreach and activities throughout the region.

- City of Wilsonville’s South Metro Area Regional Transit – Product Owner / Lead Agency
- Metro – Collaborate/Facilitate
- RTO Program Partners and Stakeholders – Cooperate / Collaborate
- Neighboring transit providers (TriMet, CAT, Cherriots) – Collaborate
- Transportation Options Group of Oregon - Collaborate
- Federal Transit Administration (FTA) – TDM milestone and financial reports
- Oregon Department of Transportation (ODOT) - Coordinate/Report
- Wilsonville City Council - Approves annual budget
- Ride Connection - Collaborate
- Community groups and organizations involved in transportation issues
- Organizations serving people of color, older adults, disabled, and LEP speaking residents’ needs
- Organizations and advisory committees serving regional bicycle, pedestrian, and transit needs
- General public – Provide input
- Wilsonville businesses
- Wilsonville public and higher education schools

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Hire a Bike and Pedestrian Coordinator (July 2018)
- Continued support and implementation of the Drive Less/Save More and Drive Less Connect collaborative marketing campaign through participation in the Drive Less Challenge workgroup and promotion of the program. (ONGOING)
- Prepare for Fall 2018 TMP implementation through extensive outreach process (July 2018)
- Work with large businesses to begin a vanpool program in Wilsonville (ONGOING)
- Assess and meet transit system demands of Oregon Institute of Technology main Portland area campus in Wilsonville (ONGOING)
- Coordinate and host Walk Smart’s Walk at Lunch events (April 2019 – September)
- Staff outreach booths at local business fairs and community events (ONGOING)
- Work directly with employers to find the best travel options for their employees (ONGOING)
- Assist with DEQ ECO surveys and trip reduction plans (ONGOING)
- Collaborate with regional partners to promote WES as a viable transportation option (ONGOING)
- Collaborate with local schools to assist with walking and biking to school programs and Safe Routes to School plans and promotions (ONGOING)
- Focused outreach to low-income families and ESL learners (ONGOING)
- Social media campaigns to increase youth ridership and participation in transit options
- Conduct annual bicycle and pedestrian counts at key Wilsonville intersections and trails

III. OTHER REGIONAL PLANNING PROJECTS

to coincide with regional and national efforts (September 2018)

- Actively participate in Metro’s Collaborative Marketing Group (ONGOING)

Schedule for Completing Activities

Please review the Major Project Milestones section for expected completion dates and timeline of SMART Options Program projects.

Budget

Funding is utilized for SMART Options Program staffing and services supplemented by TDM grants from Metro, the State of Oregon, and local funds. Local match is provided by the City of Wilsonville employer transit payroll tax, which is currently set at 0.5% per \$1,000. Staffing will fund a portion of the Programs Manager, Program Coordinator, (new) Bike and Pedestrian Coordinator and two program interns.

Please note: The funding amounts listed below are a result of SMART staff turnover and an unmet need for a grants manager. SMART is fully staffed as of June 2017 and has been made aware by Metro the funds that are available.

FY 2018-19 Costs and Funding Sources

Requirements:		Resources	Ratio	Actual
Staff	\$198,486	Federal Grant FY 12	89.73%	\$55,000
		Local Match	10.27%	\$5,648.5
		Federal Grant FY 13	89.73%	\$60,000
		Local Match	10.27%	\$6,162
		Federal Grant FY 17	89.73%	\$65,000
		Local Match	10.27%	\$6,675.5
TOTAL	\$198,486			\$198,486

Full-Time Equivalent Staffing:

Grants and Program Manager	.25
Program Coordinator	.50
(New) Bike/Ped Coordinator	1
Options Program Interns (two at .5)	1
TOTAL	2.75

ODOT Development Review

Staff contact: Jon Makler, jon.makler@odot.state.or.us

Description:

ODOT reviews local land use actions and participates in development review cases when those actions may have safety or operational impacts (for all modes of travel) on the state roadway system, or if they involve access (driveways) to state roadways. This includes work with jurisdiction partners and applicants, and products may include written responses and/or mitigation agreements. This work includes review of quasi-judicial plan amendments, code and ordinance text amendments, transportation system plan amendments, site plans, conditional uses, variances, land divisions, master plans/planned unit developments, annexations, urban growth boundary expansions and recommendations for industrial land site certifications. ODOT also works to ensure that long-range planning projects integrate development review considerations into the plan or implementing ordinances, so that long-range plans can be implemented incrementally over time.

Objectives:

- Make recommendations for mitigation of safety and operational impacts of development on the state roadway system as appropriate
- Work collaboratively with local jurisdictions and applicants to develop mitigation agreements
- Review land use actions for Transportation Planning Rule (TPR), Oregon Highway Plan, Access Management Rule and ODOT permit compliance and make recommendations as appropriate

Previous Work:

Work during the 2016-2017 fiscal year included review of over 2,000 land use actions, with approximately 150 written responses and 100 mitigation agreements.

Methodology:

General methodology steps include:

- Intake of local/regional jurisdiction notice of land use actions
- Review for impact on state roadway system; review of plan amendments and development site plan review for TPR (comprehensive plan amendment/zone change), Oregon Highway Plan, access and permit considerations as appropriate
- Work with partners and applicants as necessary to determine appropriate mitigation
- Recommend conditions of approval as appropriate regarding the proposed land use action for mitigation of safety and operational impacts of development and ODOT permit requirements

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

- Products occur throughout the planning period, depending on development/land use proposals and timing of notices
- May include response letters and mitigation agreements

III. OTHER REGIONAL PLANNING PROJECTS

Entities Responsible for Activity:

ODOT – Product Owner/Lead Agency; Cooperate/Collaborate/Make Recommendations

Cities and Counties – Product Owner/Lead Agency for local land use process

Department of Land Conservation and Development (DLCD) – Cooperate/Collaborate

Schedule for Completing Activities:

Please refer to schedule information provided in the *Objectives* and *Tangible Products* sections of this planning activity description.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2011-2012	\$250,000	2.0
2012-2013	\$250,000	2.0
2013-2014	\$300,000	2.75
2014-2015	\$300,000	2.75
2015-2016	\$300,000	2.75
2016-2017	\$330,000	3.00
2017-2018	\$300,000	2.75

Estimated FY 2018-2019 Costs and Funding Sources:

Requirements:			Resources:		
Staff Time	\$	300,000	SPR	\$	300,000
<i>TOTAL</i>	\$	300,000	<i>TOTAL</i>	\$	300,000
Full-Time Equivalent Staffing					
Regular Full-Time FTE		2.75			
<i>TOTAL</i>		2.75			

ODOT – Transportation and Growth Management (TGM)

Staff contact: Jon Makler, jon.makler@odot.state.or.us

Description:

Oregon's Transportation and Growth Management (TGM) Program supports community efforts to expand transportation choices for people. By linking land use and transportation planning, TGM works in partnership with local governments to create vibrant, livable places in which people can walk, bike, take transit or drive where they want to go. The ODOT/DLCD TGM program provides grants to regional and local jurisdictions to conduct land use and transportation planning.

Objectives:

- Partner with DLCD and regional or local governments to conduct land use and transportation planning efforts receiving TGM grants
- Provide technical assistance with regard to best practices and consistency and compliance with the Oregon Transportation Plan, Oregon Highway Plan, Transportation Planning Rule, and other applicable state transportation plans, regulations and standards

Previous Work (grants ending in FY 2018):

- Beaverton – Active Transportation Plan (end date 11/30/17)
- Cornelius – TSP Update (end date 4/30/18)
- Gladstone – TSP Update (end date 1/31/18)
- Portland – Enhanced Transit Corridors Plan (end date 5/31/18)
- Metro – Transit System Expansion Policy (element of Regional Transit Strategy) (end date 10/31/17)
- Portland - Pedestrian Master Plan Update (tentative end date 6/30/18)
- Washington County - TV Hwy Transit Operations and Access Study (tentative end date 6/30/18)
- Molalla TSP Update (June 2018)

Current Work

- Washington County – First/Last Mile (June 2019)
- Portland – Columbia Corridor Plan (June 2019)
- Gresham – Clackamas-Columbia Corridor (June 2019)
- Multnomah County – Scenic Gorge Congestion Management (2018)
- South Clackamas Transit Master Plan (June 2019)

Methodology:

Methodology is dependent on work product, but generally includes standard planning steps (identifying the problem, existing conditions, policy framework, needs assessment, development of alternatives, evaluation of alternatives, recommendations, funding strategies) consistent with the Oregon Highway Plan, Transportation Planning Rule and the Regional Transportation Plan and Functional Plan.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

Interim and Final Deliverables for each of the following grant projects, as described in each individual grant Agreement:

III. OTHER REGIONAL PLANNING PROJECTS

- Portland: Columbia Corridor Refinement Plan
- Gresham: Concept Plan for Clackamas-Columbia Corridor
- South Clackamas Transit District: Transit Master Plan
- Multnomah County: Congestion Management Plan for Columbia River Historic Highway Corridor
- Washington County: TSP Amendment and Action Plan

Additional TGM applications will be solicited and grants will be awarded in 2018 for project completion by June 2020.

Entities Responsible for Activity (local Product Owner varies by grant):

Oregon Department of Transportation – Product Owner
 DLCD – Product Owner
 Cities and Counties – Product Owner
 Metro – Product Owner or Cooperate/Collaborate
 TriMet – Product Owner or Cooperate/Collaborate
 Community groups and organizations/stakeholders – Coordinate

Schedule for Completing Activities:

Please refer to schedule information provided in the *Current Work* sections of this planning activity description.

Funding History:

Biennium	Total Metro Area Grant Budget	FTE Comparison
2013-2015	\$ 870,125	2.0
2014-2016	\$ 813,250	2.0
2015-2017	\$ 716,705	2.0
2016-2018	\$910,280	2.0

Estimated FY 2018-2019 Costs and Funding Sources:

Requirements:		Resources:	
ODOT Staff Time	\$	TGM (STBG)	\$
2018-2019 Grants	\$		
2018-2019 Grants estimate	\$		
TOTAL	\$	TOTAL	\$
Full-Time Equivalent Staffing			
Regular Full-Time FTE		2.0	
TOTAL		2.0	

ODOT – Region 1 Active Transportation Strategy

Staff contact: Jon Makler, jon.makler@odot.state.or.us

Description:

Building on the recently completion of the Active Transportation Needs Inventory, this project will enable ODOT Region 1 to engage in the identification and conceptual planning of projects that increase biking, walking and access to transit. The Oregon Transportation Plan set a goal of completing the state biking and walking network by 2030. The 2016 Statewide Bicycle and Pedestrian Plan and accompanying Implementation Plan establish a framework for pursuing this.

Objectives:

- Identify priority active transportation investments
- Develop facility cross-sections and project plans (not to exceed 30% design)
- Support mobility corridor efforts throughout the region to ensure facilities for walking and biking

Previous Work:

- Region 1 Active Transportation Needs Inventory (FY 2013 - 2017)

Methodology:

- Develop region-specific implementation actions based on the Oregon Bicycle and Pedestrian Plan
- Select needs on state facilities and initiate project planning
- Collaborate with local agencies in identifying opportunities to link implementation actions with transportation system plan activity (development or implementation)

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

- Progress report presentations to TPAC and county coordinating committees (plus Portland)

Entities Responsible for Activity:

Oregon Department of Transportation – Lead
Cities and Counties in ODOT Region 1 – Collaborate
Metro – Coordinate
Tri-Met and rural transit providers – Coordinate

Schedule for Completing Activities:

Please refer to schedule information provided in the *Major Project deliverables/milestones* section of this planning activity description.

III. OTHER REGIONAL PLANNING PROJECTS

Funding History:

- Prior to FY18: Approximately \$270,000 was invested in the Active Transportation Needs Inventory work that provides a foundation for this effort.
- FY18: \$150,000

Estimated FY 2018-19 Costs and Funding Sources:

Requirements:			Resources:		
Consultant Services	\$	125,000	SPR	\$	150,000
Staff Time	\$	25,000			
<i>TOTAL</i>	\$	150,000	<i>TOTAL</i>	\$	150,000
<u>Full-Time Equivalent Staffing</u>					
Regular Full-Time FTE		0.5			
<i>TOTAL</i>					

ODOT – Region 1 Transportation Data, Tools and Reports

Staff contact: Jon Makler, jon.makler@odot.state.or.us

Description:

In recent years, ODOT has produced several atlas-style documents to support the planning, programming and development of transportation investments around the region. These include the Interchange Atlas, Active Transportation Needs Inventory Atlas, Corridor Bottleneck Operations Study Project Atlas and Active Traffic Management Study. Every year, the data underlying these studies requires management and upkeep. The purpose of this project is to ensure that ODOT and its partners always have up to date and useful data available.

Objectives:

- To support planning, programming and design of a safe and efficient transportation system.
- To ensure ready access to current and reliable data that supports decision making.

Previous Work:

As noted, previous UPWP efforts have led to initial and updated versions of several atlases.

Methodology:

- Continue to invest in data collection (ongoing)
- Identify needs for new data or new data representations (annual review)
- Update published documents (ATNI, e.g.) as appropriate
- Make as much of this data available online (TransGIS, e.g.) as possible
- Perform outreach to raise awareness of data availability and utility

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

- Annual “Corridor Performance Reports”
- Analysis of freeway off-ramp queuing
- Atlas “user guides” to support business case preparation and project delivery

Entities Responsible for Activity:

ODOT – Product Owner/Lead Agency

Metro – coordinate

TriMet, jurisdictional partners - inform

Schedule for Completing Activities:

Ongoing

III. OTHER REGIONAL PLANNING PROJECTS

Funding History:

FY18: \$100,000

Estimated FY 2018-2019 Costs and Funding Sources:

Requirements:			Resources:		
Consultant Services	\$	70,000	SPR	\$	100,00
Staff Time	\$	30,000			
TOTAL	\$	100,00	TOTAL	\$	100,00
Full-Time Equivalent Staffing					
Regular Full-Time FTE		0.25			
TOTAL		0.25			

ODOT – Region 1 Planning for Operations

Staff contact: Jon Makler, jon.makler@odot.state.or.us

Description:

ODOT seeks to leverage its recent work program investments in diagnosing bottlenecks and developing a strategy for active traffic management (ATM). This project will seek to identify and plan for project investments that support Transportation System Management and Operations (TSMO) on highways throughout the region. These investments are meant to improve safety and efficiency for all users of the transportation system.

Objectives:

- Identify and prioritize investment opportunities where TSMO can improve safety and efficiency
- Collaborate with local and regional agencies to find and implement cost-effective TSMO investments
- Enhance ODOT’s ability to support local planning efforts with respect to planning for operations

Previous Work:

- Most recently, ODOT has developed the Corridor Bottleneck Operations Study (CBOS) and Active Traffic Management Study, both of which build on 30+ years of traffic management efforts in the region.

Methodology:

- Perform on-going diagnostic analysis of the transportation system, especially before/after studies as projects are built.
- Collaborate with local agencies on the development of transportation system plans, with emphasis on integrating ATM and other strategies to achieve safety and efficiency goals.
- Coordinate this effort with Metro and other partners on the upcoming TSMO Strategic Plan, including its updating and implementation.
- Identify and prioritize TSMO investment opportunities
- Early project planning (not to exceed 30% design)

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

- Progress report presentations to TPAC and county coordinating committees (including Portland)

Entities Responsible for Activity:

Oregon Department of Transportation – Lead

Metro, TriMet, Jurisdictional Partners – Cooperate/Collaborate

Schedule for Completing Activities:

Ongoing

Funding History (see FY17 UPWP under Before/after study and Facility Bottleneck and Solutions Feasibility Assessment):

Fiscal Year	Total Budget	FTE Comparison
2016-17	\$400,000	
2017-18	125,000	

Estimated FY 2018-2019 Costs and Funding Sources:

Requirements:			Resources:		
Staff Time	\$	25,000	SPR - Region	\$	125,000
Project Staff/Consultants	\$	100,000		\$	
TOTAL	\$	125,000	TOTAL	\$	125,000

Full-Time Equivalent Staffing

Regular Full-Time FTE		.25			
<i>TOTAL</i>		.25			

Value Pricing Feasibility Analysis

Contact: Mandey Putney, mandey.putney@odot.state.or.us

Description:

Growing congestion on Portland area highways is increasing travel delays and unpredictability. This congestion affects quality of life as travelers sit in cars or on the bus, and impacts the economy through delayed movement of merchandise.

Ongoing efforts to address congestion in the Portland area include investments in transit, bicycle, pedestrian and highway projects. But more is needed to address congestion. ODOT is conducting a feasibility analysis to explore the options available and determine how value pricing could help improve congestion in the Portland metro area.

Oregon's House Bill 2017, also known as Keep Oregon Moving, directs the Oregon Transportation Commission to develop a proposal for value pricing on I-5 and I-205 from the state line to the junction of the two freeways just south of Tualatin, to reduce congestion. The State Legislature directed the OTC to seek approval from the Federal Highway Administration no later than December 31, 2018. If FHWA approves, the OTC is required to implement value pricing.

The OTC formed a policy advisory committee in fall 2017 to provide a recommendation after considering technical findings, likely effects (traffic operations, diversion, equity, environmental and air quality, and others), mitigation opportunities and public input.

Objectives:

- Identify the location(s) best suited for congestion pricing on I-5 and I-205 in the Portland area.
- Engage stakeholders and the public in a robust and transparent discussion as the Oregon Transportation Commission develops its proposal for the Federal Highway Administration regarding the implementation of congestion pricing on I-5 and I-205 in the Portland region.
- Submit the proposal, per legislative direction, by Dec. 31, 2018.

Previous Work:

- Procured consultant services to provide technical analysis and conduct public engagement (fall 2017)
- Formed Policy Advisory Committee in fall 2017; conducted meetings between December 2017 and June 2018.
- Held community open house meetings in early 2018.
- Provided 2013-2015 data to document growing congestion and crash rates on Portland area freeways in the 2016 Transportation Performance Report.

Methodology:

ODOT is the lead agency and is responsible for conducting a transparent feasibility analysis, with input from the public and a 25-member policy advisory committee composed of Metro and local jurisdictions in Oregon and Washington, as well as diverse stakeholder interests. Metro, SW RTC and consultant experts will join ODOT to conduct and review model results. The Metro model and proprietary consultant toll optimization models will be used.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Obtain Oregon Transportation Commission direction on location(s) to include in congestion pricing proposal to Federal Highway Administration, FY19Q2
- Submit proposal to Federal Highway Administration, FY19Q2
- Begin environmental review under National Environmental Policy Act, FY19Q4

Entities responsible for activity:

- OTC and ODOT - Lead Agency
- Washington State Department of Transportation – Collaborate
- Metro – Collaborate, Conduct and review modeling
- SW Washington RTC – Collaborate, Conduct and review modeling
- Multnomah County – Collaborate
- Washington County – Collaborate
- Clackamas County – Collaborate
- Clark County – Collaborate
- City of Portland – Collaborate
- City of Vancouver – Collaborate

Other Stakeholders:

- Verde
- Federal Highway Administration
- AAA Oregon
- Oregon Environmental Council
- Portland Business Alliance
- Fred Meyer and other large employers
- Community Alliance of Tenants
- Oregon Trucking Association
- The Street Trust
- TriMet and C-TRAN
- Port of Portland
- OPAL Environmental Justice Oregon
- Westside Economic Alliance
- Ride Connection
- I-5 and I-205 commuters and users
- Communities adjacent to I-5 and I-205
- General public

Funding History

This project is being described for the first time in this UPWP, and therefore does not include a discrete funding history.

Estimated FY 2018-19 Costs and Funding Sources:

Requirements:			Resources:		
Consultant Services	\$	2,800,000	State of Oregon	\$	2,800,000
Personal Services - ODOT	\$	750,000	State of Oregon	\$	750,000
Personal services - Metro	\$				
TOTAL	\$	3,550,000	TOTAL	\$	3,550,000
<u>Full-Time Equivalent Staffing</u>					
Regular Full-Time FTE		0.5			
<i>TOTAL</i>		0.5			

French Prairie Bridge Connectivity

Staff contact: Zach Weigel, weigel@ci.wilsonville.or.us

Description:

The Interstate 5 Boone Bridge, the only existing connection across the Willamette in the Wilsonville area, is considered unsafe for pedestrians and cyclists. The French Prairie Bridge will provide a critical missing link to restore a seamless, non-highway connection between Portland and Eugene. The bridge will connect the Portland region with the French Prairie area by linking the Ice Age Tonquin Trail with the Champoeg Trail and the Willamette Valley Scenic Bikeway. The French Prairie Bridge would also serve as a needed rapid-incident, emergency response system allowing authorized vehicles a bypass when the Boone Bridge is blocked. The bridge will give ODOT and other responsible authorities the ability to clean-up faster; and police, fire, and other emergency vehicles will have better access to incidents. Currently, when traffic incidents occur near Boone Bridge, I-5 and the entire surrounding freeway system can shut-down for hours.

Objectives:

- Safe bicycle and pedestrian access
- Improved connectivity between the Willamette Valley Scenic Bikeway and new regional Ice Age Tonquin Trail.
- Emergency and post-disaster route for police, fire and response vehicles and equipment.
- Tourism development
- Practical, cost-effective transportation solution with multiple public benefits.

Previous Work:

A preliminary alternatives analysis and selection of preferred location occurred in previous City master planning efforts. The current work effort will revisit these previous studies to determine if the conclusions are still valid before initiating feasibility analysis for the proposed location and concept planning efforts.

Methodology:

The French Prairie Bridge will be the only bike-ped bridge over the Willamette River located within a 30- mile (48 km) stretch between Newberg and Oregon City. The lack of any river crossing other than Interstate-5 at Boone Bridge forces cyclists to take significant risks by traveling on a six-lane freeway with no separation from high-speed trucks and cars.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Bridge Type Selection Report summarizing final bridge selection process and decision making.
- Funding alternatives memorandum analyzing different funding options for design and construction completion of the final selected bridge type, size and location.
- Preliminary 30% Construction Plan, Specification & Estimate (PS&E) for final selected bridge type, size and location.

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Entities Responsible for Activity:

- Lead Agency: City of Wilsonville
- Partners and Stakeholders: Metro – funding partner
- Oregon Department of Transportation – Cooperate/Collaborate
- Clackamas County - The City of Wilsonville and Clackamas County to determine ownership of the bridge and land commitment to the bridge on each shore of the Willamette.
- Federal Highway Administration (FHWA) Old Town Neighborhood Association Charbonneau Country Club
- Cycle Oregon, BTA, and other organizations and advisory committees serving regional bicycle and pedestrian needs
- Tualatin Valley Fire and Rescue District (TVFRD) Clackamas County Sheriff’s Office
- Friends of French Prairie Travel Oregon

Schedule for Completing Activities:

- August 2018: Bridge Type Selection Report summarizing final bridge selection process and decision making.
- December 2018: Funding alternatives memorandum analyzing different funding options for design and construction completion of the final selected bridge type, size and location.
- March 2019: Preliminary 30% Construction Plan, Specification & Estimate (PS&E) for final selected bridge type, size and location
- Project is scheduled to conclude in FY 2018-19.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2013-14	\$16,437.00	
2014-15	\$39,498.00	
2015-16	\$49,997.00	
2016-17	\$500,613.00 (\$320,287 Metro)	

FY 2017-18 Costs and Funding Sources:

Requirements:

City Staff and Professional Consultant Services \$ 760,000

Resources:

Metro \$ 600,000

Other \$ 160,000

TOTAL \$ 760,000 TOTAL \$ 760,000

Full-Time Equivalent Staffing

Regular Full-Time FTE

FY 2018-19 Costs and Funding Sources:

Requirements:		Resources:	
City Staff and Professional Consultant Services	\$ 430,000	Metro	\$ 300,000
		Other	\$ 130,000
TOTAL	\$ 430,000	TOTAL	\$ 430,000

Full-Time Equivalent Staffing

Regular Full-Time FTE

TOTAL

Interstate 205: Stafford Road to OR99E

Staff contact: Michael Mason, Michael.w.MASON@odot.state.or.us

Description:

The Interstate 205: Stafford Road to OR99E project will plan and design for the addition of one auxiliary lane between I-205 and OR99E, as well as seismic and lane widening on the Abernethy Bridge connecting Oregon City to West Linn in Clackamas County. The crash rate in the project area is nearly three times the state average. By widening the freeway and bridge, improving the ramps, and implementing Active Traffic Management (ATM) strategies, the number of dangerous crashes is expected to decrease by up to 21%. The project area is a regional bottleneck because I-205 is reduced from three lanes in each direction to two lanes in each direction between Stafford Road and OR99E. The rest of I-205 to the north and south of this section is three lanes in each direction. This project will alleviate significant delays currently experienced by local, regional, national and international motorists and freight movers. The ODOT-led planning and design work has several elements, including:

- Project Management
- Public and Stakeholder Involvement Outreach and Communications
- Transportation Planning
- Design Engineering
- Traffic Analysis and Management
- Graphics and Visual Imaging

Objectives:

The objectives of the planning and design work are to:

- Refine the project design work that has been completed during the past 15 years
- Establish a clearer cost estimate and project scope
- Pursue completion of a design acceptance package through consultant work
- Better understand the environmental impacts (noise, in-water work, ROW, for example) of the project
- Determine a construction staging strategy
- Support efforts to secure funding for final design and construction phases

Previous Work:

The project is informed by several past technical and planning works, including the 2003 East Portland Freeway Stafford Road to OR99E Reconnaissance Report, the 2006 I-205 Storm Sewer Atlas and the 2006 I-205 Traffic Analysis Reconnaissance Report. In 2015, ODOT completed the Conceptual Widening and Seismic Retrofit Technical Memorandum. ODOT has submitted two applications for funding under the Federal FastLane Grant program (now known as Infrastructure for Rebuilding America (INFRA)).

Methodology:

- Determine the amount of funding available for planning and design work
- Develop scope of work for preliminary planning and design work based on funding
- Create a public involvement plan that includes outreach to neighborhoods, stakeholders and jurisdictional partners
- Establish a proof of concept report that confirms past assumptions and feasibility of project
- Conduct design verification
- Based on previous work and input from stakeholders, develop a draft design acceptance plan
- Finalize design acceptance plan based on feedback from draft

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

ODOT expects the project team to provide a final design acceptance package during this fiscal period.

Entities Responsible for Activity:

- Oregon Department of Transportation – Product owner
- Clackamas County, West Linn and Oregon City – Cooperate
- Stakeholders, Community Organizations – Cooperate

Schedule for Completing Activities:

- Proof of Concept – 9/28/2017
- Cost to Complete – 12/31/2017
- Design Verification – 1/10/2018
- Draft Design Acceptance Plans – 4/25/2018
- Final Design Acceptance Plans – 8/31/2018

Funding History:

2015-2018 STIP -- \$2,500,000 approved by OTC on 3/17/16 for planning phase.

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2016	\$2,500,000	4.0

FY 2018-19 Cost and Funding Sources:

Requirements:		Resources:	
Consultant Services	\$56,000	STBG	\$80,000
Staff Time	\$24,000		\$
			\$
TOTAL \$80,000		TOTAL \$80,000	

Clackamas County – Trolley Trail Bridge: Gladstone to Oregon City

Staff Contact: Joel Howie, PE (Clackamas County) jhowie@clackamas.us, Jacque Betz (City of Gladstone), betz@ci.gladstone.or.us

Description:

The project will study the feasibility of replacing the recently demolished Union Pacific Railroad's Portland Avenue Historic Trolley Bridge for pedestrians and bicyclists. The project would provide a much-needed active transportation link across the Clackamas River and become the signature landmark for the popular new Trolley Trail.

Gladstone and Oregon City, designated as a town center and a regional center, respectively, in Metro's 2040 Growth Concept and 2035 Regional Transportation Plan, are separated by the Clackamas River. The Gladstone side of the river is home to many schools and community centers serving traditionally underserved populations, and the Oregon City side is the site of a high-density commercial and residential development. The most direct route connecting the two centers across the river is the 99E/McLoughlin Boulevard Bridge, but it lacks bicycle facilities and its sidewalks are substandard. Additionally, the Oregon Department of Transportation has stated that adding bicycle facilities to the bridge roadway would conflict with traffic and freight movement along McLoughlin Boulevard, a state highway.

Objectives:

The following are the objectives of the project related to FY 2018-19 with this UPWP:

- County will develop a Request for Qualifications document for engineering consultant services to conduct the feasibility study. County and City will review consultant qualifications submittals and rate the consultants. County will develop a draft scope of work and provide to the highest rated consultant. County will negotiate the final scope of work and fee estimate with the highest rated consultant. If reasonable, request a contract with the consultant. If unreasonable, repeat negotiation process with the second highest rated consultant and beyond until a reasonable fee estimate is reached.
- Upon completion of the consultant contract, the following are the expected tasks to be included in the feasibility study:
 - project management and project meetings;
 - public involvement;
 - geotechnical evaluation of foundation alternatives;
 - environmental scoping including wetland reconnaissance, permitting requirements such as Clean Water Act Section 404 (US Army Corps of Engineers), Oregon Removal-Fill Law (Oregon Department of State Lands), Endangered Species Act (U.S. Fish & Wildlife Service and National Marine Fisheries Service), and stormwater Management Guidelines (DEQ), rare plant survey, no effects documentation and cultural resources investigation; identification of local permitting requirements including floodplain regulations;
 - investigation of existing utility impacts and possible utilities to be carried on the new

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- bridge;
- evaluation of river hydraulics and scour potential;determination of needed streambank restoration;
- evaluation of structural alternatives including new bridge types and possible re-use of existing surplus bridge structures; alternative bridge Type, Size and Location (TS&L) Plans based on evaluation and alternative cost estimates;
- maintenance plan and cost estimate;
- identification of needed agency agreements and maintenance plan requirements;
- and trail concept planning for connections to Gladstone and Oregon City trails.

Previous Work:

No previous work has been completed in the last couple of years related to the feasibility of a new bridge for the Trolley Trail to connect Gladstone and Oregon City.

Methodology:

Clackamas County is responsible for implementing the RFQ and being the holder of the consultant contract. Both Clackamas County and the City of Gladstone are responsible for reviewing and providing comments on the draft feasibility study and associated draft reports.

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19:

The project will result in a draft and final feasibility report. The draft report is expected to be included in FY 2018-19, but the final report is expected in FY 2019-20. It is anticipated that the feasibility study will have the following reports included in the appendices:

- Geotechnical evaluation of foundation alternatives;
- Environmental scoping document including wetland reconnaissance, permitting requirements such as Clean Water Act Section 404 (US Army Corps of Engineers), Oregon Removal-Fill Law (Oregon Department of State Lands), Endangered Species Act (U.S. Fish & Wildlife Service and National Marine Fisheries Service), and stormwater Management Guidelines (DEQ), rare plant survey, no effects documentation and cultural resources investigation; identification of local permitting requirements including floodplain regulations;
- Evaluation of river hydraulics and scour potential and determination of needed streambank restoration;
- Evaluation of structural alternatives including new bridge types and possible re-use of existing surplus bridge structures; alternative bridge Type, Size and Location (TS&L) Plans based on evaluation and alternative cost estimates; maintenance plan and cost estimate;
- Trail concept plans for connections to Gladstone and Oregon City trails.

Schedule for Completing Activities:

Draft feasibility study: January 2019

Final feasibility study: March 2019

Budget for Project:

The project budget is \$225,000 with a grant amount of \$201,892. The City of Gladstone will provide the remaining \$23,108 as the required 10.27% match of the grant. It is expected that \$150,000 of the \$225,000 will be expended in FY 2018-19.

Hillsboro Regional Center – Oak, Baseline, and SE 10th Avenue Study

Karla Antonini karla.antonini@hillsboro-oregon.gov

Description of Project:

In Hillsboro, the Baseline/Oak couplet (Oregon Highway 8, or OR8) is a critical transportation element connecting western Washington County through Hillsboro’s Downtown. While it serves as the primary route bringing freight and commuters into Hillsboro’s Downtown core, as well as carrying regional travel to and from western portions of the County, it has long imparted some negative impacts on the City’s residents and businesses. As the “front door” for many drivers, the two streets create a pass through, commercial strip presenting challenges for potential customers and pedestrians. The streets create a barrier between the low-income, ethnically diverse neighborhood to the south, and the City’s Downtown core (including important government and commercial functions) lying to the north. Both streets have existing sidewalks, yet are less than desirable to walk or bike along, and are difficult to walk or bike across due to safety issues. This also makes bus stops difficult for pedestrians to access. The couplet, while providing high visibility due to the annual daily traffic of 33,000, is not highly supportive to business investment along the corridor due to the poor condition of the sidewalk zone, the rapidly-moving traffic (30 mph through a Central Business District), and the lack of on-street parking (except on one side of Oak) to support storefront business access and better buffer the pedestrian zone from auto and freight traffic. Moreover, the couplet fails to direct drivers and pedestrians to the nearby Main Street business district, thus eliminating potential customers for the Main Street merchants.

This project seeks to support redevelopment along the Oak/Baseline couplet by providing a comfortable, human-scale environment for residents and business customers while at the same time accommodating auto and truck traffic along the State highway. It also seeks to increase accessibility by persons using all modes of transport to priority community service destinations such as City and County offices, the Health & Education District, the 10th Street commercial corridor as well as the Main Street district, with its restaurants, retailers and arts and entertainment venues. The project will also enhance access to the regional light rail system located in the heart of the Downtown, as well as bus access to the TriMet Line 57 Frequent Service route, and routes 46, 47, and 48, and the Yamhill County fixed-route bus service at MAX Central Station, located one block north of the Oak-Baseline couplet.

Objectives of the Project:

- To select a preferred design alternative that improves the conditions on Baseline, Oak and 10th Avenue to make it a more pleasant and inviting environment for all modes of travel, pedestrians and residents.
- To select a preferred design alternative that allows for easier access to the north and south of Oak and Baseline Streets for the low income, ethnically diverse neighboring residents to access services from the Health & Education District, the Downtown area, and the SW Industrial Area.
- To select a preferred design alternative that catalyzes private and public development in the Hillsboro regional center as envisioned in land use planning policies.
- The concept plans will include proposed plans, cross-sections, locations of pedestrian and bicyclist facilities and amenities, transit facilities and amenities, and concept-level traffic, bicycle, and pedestrian signal and related technology system modifications and enhancements.

- The final report will describe the preferred concept for improving the Baseline, Oak and 10th Avenue corridor and scope of work for implementation (Design Exceptions, Corridor Plan approvals, list of future permits, plan amendments, legal actions, etc.).
- Obtain Design Concurrence from ODOT Region 1 Roadway and State Traffic Engineer's office for preferred concept.

Previous Work in the program/project:

Scope of work submitted to ODOT for comment

Completed a Project Change Request form to expand the project limits on Oak and Baseline Streets to SW Adams Street and on SE 10th Avenue from SE Maple Street to E Main Street to better capture the streetscape impacts.

Working on amending the work scope for the project.

IGA submitted to ODOT for execution.

Bulleted report of progress in the past 1 or 2 years only.

Methodology and Entities responsible for the project

- City of Hillsboro – Lead Agency
- Metro – Cooperate/Collaborate
- Oregon Department of Transportation – Cooperate/Collaborate
- TriMet – Cooperate/Collaborate
- Greater Hillsboro Chamber of Commerce - Collaborate

Other stakeholders:

- Washington County
- Forest Grove
- Cornelius
- Metro Regional Freight Technical Advisory Committee
- Regional Transportation Council (RTC) of metropolitan Washington County
- Oregon Transportation Commission (OTC)
- Land Conservation and Development Commission (LCDC)
- Department of Land Conservation and Development (DLCD)
- Community groups and organizations involved in climate planning, equity, land use and transportation issues
- Organizations serving minority, elderly, disabled, and non-English speaking residents needs
- Organizations and advisory committees serving regional bicycle, pedestrian, and transit needs
- General public

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-19

Work scope finalized
Obligate funds for the project
RFP written, reviewed and finalized
ODOT/Metro Review of RFP
Contract with refined scope (includes one month for RFP release and interviews)
Consultant selected and work begins

Bulleated report of each part of the program/project that includes the timeline for completion (including coming years, if known).

Schedule for Completing Activities

November 2017: work scope finalized
December 2017: Obligate funds for the project
January 2018: RFP written, reviewed and finalized
February 2018: Contract with refined scope (includes one month for RFP release and interviews)
March 2018: Consultant selected
Schedule will require project carryover into FY 2018-19

Budget for Project

Federal: \$500,000
Local: \$57,227
Total: \$557,227

Lake Oswego to Portland Trail Plan: Tryon Cove Park Area

Staff contact: Mel Huie, Mel.Huie@oregonmetro.gov

Description:

The plan will determine a trail alignment from Tryon State Natural Area to Foothills Park in Lake Oswego, OR. The proposed trail would be multi-use (bike and pedestrian) and be one to two miles long. Trail alignment(s) would be on public owned properties and/or public Right-of-Ways, and include a future trail bridge over Tryon Creek. This trail segment would connect to the Willamette River Greenway and the rest of the regional trail system. Environmental studies and cost estimates for engineering and construction will be conducted. Roles and responsibilities for trail ownership and maintenance will be recommended. A Technical Advisory Committee of local jurisdictions and ODOT will work with Metro on the plan.

The Trail Study results shall not preclude future transit and/or streetcar options in this corridor. The ultimate goal is to have a transit and trail project built. Any interim trail shall not diminish transit or rail options in the Willamette Shore Line Corridor and maintain existing vintage trolley service.

Objectives:

- Identify a trail alignment to connect Tryon Creek State Natural Area on the west side of Hwy. 43 to the Willamette River and to Foothills Park.
- Identify an alignment and type of trail bridge over Tryon Creek connecting to the existing Foothill Park Trail.
- The proposed trail alignment shall not preclude future transit and/or streetcar options in this corridor and maintains the existing vintage trolley service.
- Coordinate with other partners/agencies on the future trail plan.
- Analyze environmental and constructability issues along the preferred alignment(s).
- Produce preliminary design documents identifying the trail alignment and cost estimates for any acquisitions of trail easements/fee simple, design P/E, construction and maintenance.
- Make recommendations as to ownership and maintenance responsibilities of future trail and define how trail, with transit, can be a viable future option.
- Coordinate the trail alignment so that it is compatible with the existing historic trolley service in the corridor and a potential future streetcar

Previous Work:

The Metro's Regional Trails plan and the RTP have incorporated this trail segment into their visions. This trail alignment is identified in the Transportation System Plan and Trails and Pathways Plan of the City of Lake Oswego and the Regional Transportation Plan (RTP). From 2005-2007 an Alternatives Analysis study of transit options in the corridor included an examination of trail alignments. In 2007, the Lake Oswego to Portland Transit Steering Committee adopted a Locally Preferred Alternative that directed the project to provide further refinement on the trail concept for the corridor. In 2009, Metro convened a trail refinement process with local partners. The

culmination of this work was a report that provides general strategy to develop a trail from Lake Oswego to Portland’s South Waterfront District.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019

This will be refined when the project scope is finalized in early 2018. The Trail Plan may include the following:

- Planning background report summarizing planning activities, project need statement and project solution statement. Quarter 1
- Base map, profiles, typical sections and narrative describing field location data. Quarter 1
- Reconnaissance level report of flow and drainage conditions, regulatory requirements to be addressed, and preliminary drainage and water quality options. Quarter 2
- Report describing anticipated trail bridge structure and foundation needs. Quarter 3
- Description of future maintenance needs and the responsible agencies. Quarter 3
- Cost estimates for future project phases (engineering, right-of-way (ROW), construction).
- Identify coordination with regulatory agencies (Oregon Division of State Lands, NOAA Fisheries, etc.) and permit processes needed to complete project. List of regulatory agencies and contacts Quarters 1-2
- Coordinate with ODOT during planning process. Quarterly project status reports Quarters 1-3
- Environmental Baseline Report to address federal environmental requirements. Quarter 2
- Cost estimates for final design, preliminary engineering, and construction. Quarter 3
- Final trail plan in paper and digital versions Quarter 3

Entity/ies Responsible for Activity:

- Metro – Lead Agency
- Clackamas County – Cooperate / Collaborate
- City of Lake Oswego – Cooperate / Collaborate
- City of Portland – Cooperate/Collaborate
- State of Oregon Parks and ODOT – Cooperate/Collaborate

Schedule:

January/February 2018 to March 2019

Funding History:

Fiscal Year	Total Budget	FTE Comparison
2016-17	0	NA
2018-19	TBD	NA

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FY 2018-19 Costs and Funding Sources:

Requirements:

Personal Services

Interfund Transfers

Materials & Services

Consultant Services \$111,445

TOTAL \$ **\$111,445**

Resources:

TOTAL \$ **\$111,445**

Full-Time Equivalent Staffing N.A.

Regular Full-Time FTE N.A.

Southwest in Motion Plan

Staff Contact: Denver Igarta, Denver.Igarta@portlandoregon.gov

Description:

Southwest In Motion (SWIM) will be a planning process that identifies a 5-year active transportation implementation strategy for all of Southwest Portland. It will incorporate several identified projects in the RTP, the Portland Bicycle Plan for 2030, Barbur Concept Plan, Southwest Corridor Plan, and community-led Platinum Bicycle Facility Strategy in Southwest.

Objectives:

- Create a five year active transportation implementation strategy for the Southwest district of Portland. The strategy will include a hierarchy of identified improvements to address pedestrian and bicycle safety and access issues.

Previous Work:

The process for developing the implementation strategy will be modeled after the successful East Portland in Motion (EPIM) project. The process for developing SWIM will also incorporate numerous previous planning projects.

Methodology:

- Assemble existing conditions information based on an inventory of transportation infrastructure and priority destinations within the project area.
- Assemble census data regarding area demographics.
- Solicit public comment to identify community priorities through a public meetings and open house events.
- Develop active transportation project candidate list with cost estimates
- Prioritize project list and develop implementation strategy.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

The following outlines the major tasks and deliverables anticipated for this project:

Task 1: Project Management

Provide status reports, cost reports and reimbursement requests. Review consultant invoices, completion reports, cost summaries and list of final products. Review and edit consultant deliverables. Prepare summaries of stakeholder meetings including agendas, information materials and comments. Prepare completion of project close-out.

Task 2: Stakeholder Involvement

Develop a review structure for local staff, stakeholder interests and partnering agencies to provide input on the identification of active transportation system needs and priorities. Provide adequate opportunity for

stakeholder participation and input throughout the project duration and respond to stakeholder values and issues.

Task 3: Background and Existing Conditions Analysis

Prepare a map of the existing conditions deficiencies.

Task 4: Identify Needs,

Identify existing pedestrian and bicycle system deficiencies within project area from existing planning projects, neighborhood priorities based on input from neighborhood association requests and individual requests received by PBOT.

Task 5: Develop Project List

Define potential capital transportation improvement projects and cost estimates based on identified needs and constraints.

Task 6: Recommended Implementation Strategy

Recommend both short and long-term capital transportation system improvements and/or other policy and operational strategies based on evaluation of project list priorities and cost feasibility analysis.

Entities Responsible for Activity:

The City of Portland will be the lead agency for this project. It is anticipated that the Bureau of Transportation will conduct the technical planning and engineering analysis and cost estimates and final report preparation, with the potential support of consultants for some tasks.

Lead agencies/partners:

Portland Bureau of Transportation - Lead Agency/Project Manager

Other stakeholders:

- Portland Pedestrian Committee
- Portland Bicycle Committee
- Tri-Met
- Community groups and organizations involved in climate planning, equity, land use and transportation issue

Schedule for Completing Activities:

The project started FY 16/17, but was delayed due to staffing changes. PBOT finalized new project manager assignment, and the project began in earnest in August 2017. The project duration is estimated to be 16 months. With finalization of the plan in early FY 18/19

Funding History:

NA

Budget for Project:

The project budget is \$303,132 with an Federal (STP) grant amount of \$272,000 and a local match from the City of Portland of \$31,132. It is expected that \$75,000 of the \$303,132 will be expended in FY 2018-19.

Portland Central City Multi-Modal Safety Improvements

Staff contact: Gabriel Graff, Gabriel.Graff@portlandoregon.gov

Description:

The purpose of this plan is to develop a strategy to address safety and access issues resulting from competing demands on transportation infrastructure in Portland's central city. Planning for and investing in active transportation modes along with freight, transit and vehicular access will help the region attain its economic, climate, and social equity targets by providing a truly multi-modal central city. Today, the City of Portland and its many stakeholders are faced with a multitude of modal plans and competing, sometimes overlapping policies. The result is a lack clarity on how to balance these competing demands with extremely limited space in the region's most important economic and social service hub. This project will result in a strategy that identifies a multi-modal transportation network that complements adjacent land uses, preserves capacity for important uses, and accommodates and encourages the already significant active transportation use in the central city today.

Objectives:

- Identify and prioritize pedestrian, transit priority, and bicycle safety improvements in the Central City while balancing the needs of other users of the right of way.
- Develop conceptual design for potential improvements to a level sufficient to identify trade-offs and meaningfully engage the public and stakeholders
- Produce a 5-10 year prioritized project list and related strategic implementation plan of protected bikeway, transit priority and pedestrian safety improvement projects

Previous Work:

This project will build on the Central City 2035 plan currently being completed by Bureau of Transportation and the Bureau of Planning and Sustainability. To date, the project team has begun existing conditions and best practice analysis, performed two field visits, and held our first Technical Advisory Committee meeting.

Methodology:

The project will begin with a thorough review of bicycle and pedestrian conditions in key locations throughout the Central City, including major roadways, bridgeheads and significant portals. The investigation will culminate in a complete analysis of current conditions for multimodal access in downtown. The project advisory committee will use the report to identify the major issues and needs. The project will include analysis of best practices throughout North America for bicycle and pedestrian infrastructure.

Following the completion of the needs report and the review of best practices the advisory committee will begin to develop a wide range of improvement scenarios that will be further refined into a tangible and discrete set of improvements that can be implemented in the next two years using federal funds. The project will also include an extensive outreach process that will

include a community discussion of the benefits to the businesses and the public from increased multimodal access and safety.

Major project deliverables/milestones planned for this reporting period of the UPWP, 2018-2019:

- Prioritized project list brought before Portland City Council
- Implementation plan finalized
- Final report on project’s Planning and Development phase complete

Entities Responsible for Activity:

The City of Portland will be the lead agency for this project. The technical work is being performed by City of Portland staff and consultant team members.

Lead agencies/partners:

- Portland Bureau of Transportation - Lead Agency/Project Manager
- Metro - Partner agency
- Oregon Department of Transportation - Partner agency

Other stakeholders:

- Tri-Met
- Multnomah County

Schedule for Completing Activities:

The Planning and Development phase of this project is anticipated to be completed by September 2018.

Funding History:

NA

FY 2018-19 Costs and Funding Sources:

Requirements:		Resources:	
PBOT Staffing	\$ 885,379	CMAQ	\$1,046,03
Consultant Staffing	\$ 368,139	Local Match	\$208,480
TOTAL	\$ 1,235,518	TOTAL	\$ 1,253,51

Herman Road Active Transportation Project

Application lead staff: Zoe Monahan | (503) 691-3020 | zmonahan@ci.tualatin.or.us

Project Manager: Jeff Fuchs, PE | (503) 691-3034 | jfuchs@ci.tualatin.or.us

Project Engineer: Dominique Huffman, PE | (503) 691-3036 | dhuffman@ci.tualatin.or.us

Description:

This project will improve bike lanes, sidewalks, and transit stops along Herman Road between the employment district, neighborhoods, and downtown. These facilities will improve safety and mobility for all roadway users along Herman Road where currently, bicycles, pedestrians, automobiles, transit, and trucks share two 12-foot vehicle travel lanes because there are no bike lanes or sidewalks. The project will also add buffered bike lanes and other Active Transportation components where there are existing sidewalks and bike lanes along Herman Road.

Objectives:

- Identify and design safe bicycle and pedestrian improvements
- Use Public engagement to develop bicycle and pedestrian alternatives on Herman Road and select the preferred alternative
- Prepare preliminary design work to complete a gap in the active transportation corridor to provide a safe connection between residential and employment areas in northwest Tualatin.

Previous Work:

Improvements to Herman Road were identified in the City of Tualatin's Transportation System Plan (TSP), which was adopted in 2014.

Methodology and Entities responsible for the project:

Methodology:

- Develop public engagement plan
- Develop base map of the project area for design and visualization
- Identify right of way and environmental requirements
- Develop and refine alternative design solutions
- Select preferred alternative
- Develop design to 30% level

Entities Responsible for the Project:

- City of Tualatin – Lead agency
- Washington County – Funding Partner
- Metro – Funding Partner
- ODOT – Cooperate and Collaborate

Other Stakeholders:

- Tualatin Chamber of Commerce
- Tualatin Aging Task Force
- Commercial Citizen Involvement Organization
- Westside Economic Alliance
- Westside Transportation Alliance
- Washington County Coordinating Committee

IV. PROJECT DEVELOPMENT PLANNING

- TriMet
- Ride Connection
- Adjacent Property Owners

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY2018-29

Phase 1 – FY 2018 -2019 and FY 2019 -2020

- Public engagement (Q1 & Q2 2019)
- Develop alternate design solutions (Q3 & Q4 2019)
- Select preferred solution (Q1 & Q2 - 2020)
- 30% - Plan, specifications and project estimate (Q3 & Q4 2020)

Phase 2 – unfunded

- 30 -99% - Plan, specifications and project estimate
- Begin right of way, utility coordination and railroad coordination
- Assess and mitigate environmental impacts

Phase 3 – unfunded

- Construct active transportation improvements

Schedule for Completing Activities:

Refer to Phase I – FY 2018 -2019 in the Major Project deliverables/milestones section above.

Funding History:

Fiscal Year	Total Budget	FTE Comparison

FY 2017-18 Cost and Funding Sources:

Requirements:

\$
\$

Resources:

\$
\$
\$

TOTAL \$

TOTAL \$

IV. PROJECT DEVELOPMENT PLANNING

Full-Time Equivalent Staffing

Regular Full-Time FTE	1.0-2.0
TOTAL 1.0-2.0	

FY 2018-19 Cost and Funding Sources:

Requirements:

Preliminary Planning	\$
	\$

Resources:

RFFA	\$625,000
MSTIP	\$70,000
City of Tualatin	\$30,000

		\$	
TOTAL	\$	TOTAL	\$ 725,000

Beaverton Creek Trail: SW Hocken Avenue to Westside Trail

Staff Contact: Rene' Brucker, rbrucker@thprd.org

Description:

This project will design/engineer a 1.5-mile long multiuse off-street regional trail along the TriMet light rail corridor and Beaverton Creek between the Westside Regional Trail and SW Hocken Avenue in Beaverton. The trail will be a 12-foot wide hard surface (asphalt) and may include sections of permeable pavement if appropriate) and will include 2-foot wide gravel shoulders. Boardwalks, and possibly a bridge, may be needed in sections to cross wetlands and/or floodplain areas at the east end of the project. Fencing is anticipated where the trail will parallel the TriMet light rail line towards the west end of the project. Street crossings, four in total, are anticipated at SW 153rd and SW Hocken Avenue (collector streets) and at SW Shannon Place and Schottky Terrace (local streets). The crossing at SW 153rd will include upgrades to the light rail track crossing to accommodate the trail and the crossing at SW Hocken Avenue is anticipated to include a signalized mid-block crossing in order to connect to an existing on-street section of the Beaverton Creek Trail.

Objectives:

- Provide an off-street transportation option for bicycles and pedestrians where only on-street routes currently exist.
- Provide multi use trail connections to existing east/west and north/south trails, such as the Westside Trail, Beaverton Creek Trail and Waterhouse Trail, as well as to downtown Beaverton.
- Strengthen the project area's non-motorized active transportation system and improve user safety.
- Work collaboratively with local jurisdictions, stakeholders and the community.
- Improve connections to residential neighborhoods, underserved communities, commercial and employment center, transit services, schools, parks and recreation, natural areas and open space, other essential public facilities and off street trails throughout the region.

Previous Work:

Work competed in the 2016-2017 fiscal year included:

- Completed the project prospectus and developed the Scope of Work and RFP for the final review by ODOT, ODO and DOJ.
- Contacted adjacent property owners to provide information on the proposed trail corridor and gather information from them on their knowledge of the area.
- Contacted local jurisdictions informally to provide and gather information on the proposed trail corridor.

ODOT's DOJ finalized RFP for a design consultant is to be advertised prior to the end of 2017 (Qtr 2) with the phase I planning to be completed within 12 months (Qtr 2, 2018). The goals of the phase I planning are to determine the actual trail alignment, to develop the prospectus and complete a 30% design package to be advanced with an amendment into phase II preliminary engineering, ROW acquisition and final design (Qtr 2, 2018 thru Qtr 3, 2020). Construction administration/construction engineering and inspections phase III may be advanced with an amendment (Qtr 4, 2020 thru Qtr 4, 2021).

Methodology and Entities responsible for the project:

Tualatin Hills Park & Recreation District (THPRD) coordinates with and reports to ODOT and provides quarterly and yearly updates to Metro. THPRD provides project management and works collaboratively with ODOT in the project management role.

- Metro – program and update the Regional Transportation Plan
- Oregon Department of Transportation (ODOT) – oversight and management of project funding, contract negotiations and changes and provision of technical expertise and support services
- Federal Transit Administration (FTA) – coordination to minimize impacts to transit services
- TriMet – coordination to minimize impacts to transit services and ROW negotiations
- Tualatin Hills Park & Recreation District (THPRD) – oversight and management of day-to-day project activities, ROW negotiations and coordination with ODOT, local jurisdictions and stakeholders
- Community groups and organization involved in transportation issues – input and review of project development plans
- General Public – input and review of project development plans

Major Project deliverables/milestones planned for this reporting period of the UPWP, FY 2018-2019

- Continuing in phase I. Determine the preferred trail alignment.
- Complete a 30% PE package and develop a prospectus.
- Prepare amendment for phase II PE, ROW acquisition and final design.
- Quarterly progress reports to Metro.
- Begin phase II, preliminary engineering, ROW acquisition and final design

Schedule for Completing Activities:

Phase I planning - Qtr 2 2017-2018 thru Qtr 2, 2018 - 2019.

Phase II - Qtr 2, 2018-2019 thru Qtr 3, 2019-2020.

Phase II - Qtr 4, 2019-2020 thru Qtr 4, 2020-2021.

Entities Responsible for Activity:

- Metro
- Oregon Department of Transportation (ODOT)
- Federal Transit Administration (FTA)
- TriMet
- Tualatin Hills Park & Recreation District (THPRD)
- Community groups and organization involved in transportation issues
- General Public

Other Stakeholders:

- City of Beaverton
- Washington County
- Oregon Department of Transportation (ODOT)
- TriMet

IV. PROJECT DEVELOPMENT PLANNING

- Metro Council
- Federal Highway Administration (FHWA)
- Interested Public

Budget for Project FY 2018-2019

- \$1,141,000 – Total Budget
 - \$800,000 – Federal Funds (for project development and preliminary engineering)
 - \$91,000 – Local Funds for project development and preliminary engineering
 - \$250,000 – Local Funds for right-of-way

MEMORANDUM OF UNDERSTANDING
BETWEEN METRO AND
SOUTH METRO AREA REGIONAL TRANSIT
IMPLEMENTING
MOVING AHEAD FOR PROGRESS IN THE 21ST CENTURY ACT (MAP-21)

This MEMORANDUM OF UNDERSTANDING (MOU) is made and entered into by and between **METRO**, the Portland Urbanized Area Metropolitan Planning Organization (MPO), acting by and through its elected officials, hereinafter referred to as METRO, and the **SOUTH METRO AREA REGIONAL TRANSIT**, acting by and through its elected officials, hereinafter referred to as SMART, collectively referred to as the Parties.

WITNESSETH,

WHEREAS, by authority granted in ORS 190.110, units of local government or state agencies may enter into agreements for the performance of any or all functions and activities that parties to the agreement, or their officers or agents, have the authority to perform, and

WHEREAS, intergovernmental agreements defining roles and responsibilities for transportation planning between the MPO for an area and the public transit operator(s) for the area are required by MAP-21 and the Code of Federal Regulations (CFR), Chapter 23, Section 450.314; and

WHEREAS, METRO and SMART are mutually interested in the implementation of a multimodal transportation system and the Parties agree to consultation and coordination in the development of the Regional Transportation Plan (RTP), Metropolitan Transportation Improvement Program (MTIP), Regional Travel Options (RTO) program, multi-modal corridor studies, Transit Environmental Impact Statements/ Preliminary Engineering, Unified Planning Work Program (UPWP), and SMART's short-term Transit Investment Plan; and

WHEREAS, the Metropolitan Transportation Planning program is in the mutual interest of METRO and SMART and they mutually agree to appropriate funding shares to support the program; and

WHEREAS, METRO and SMART have responsibilities for complying with Federal, State, and Local regulations related to transportation and the provision of public transit; and

WHEREAS, METRO and SMART acknowledge that SMART is represented by the position for the "Cities of Clackamas County" on the Joint Policy Advisory Committee on Transportation (JPACT) and the Transportation Policy Alternatives Committee (TPAC).

NOW THEREFORE, the premises being in general as stated in the foregoing, it is agreed by and between the Parties hereto as follows:

TERMS OF AGREEMENT

1. Pursuant to the authority above, METRO and SMART agree to define roles and responsibilities in carrying out the metropolitan transportation planning process, as further described in this MOU.
2. The term of this MOU will begin on July 1, 2014 and will terminate on June 30, 2017.
3. This MOU may be revisited and modified as needed, when the Parties so determine.

METRO Agrees to:

1. Adopt and maintain the RTP and the MTIP as required by the Oregon Transportation Planning Rule and for coordination of METRO and SMART public involvement processes.
2. Provide for a coordinated, cooperative, and continuing transportation planning and programming process.
3. Manage the operation of JPACT and TPAC.
4. Develop the Congestion Management Process that is inclusive of transit, transportation demand management, and traffic operations strategies as required by federal regulations.
5. Coordinate with the Oregon Department of Transportation (ODOT) to develop and maintain regional Intelligent Transportation Systems (ITS) architecture for traffic and transit operations.
6. Conduct multimodal corridor alternative analyses, in cooperation with SMART and affected local governments, in corridors needing a major transportation investment, as called for in local or regional transportation plans.
7. Be the federally designated lead agency for transit New Starts planning as prescribed by the process administered by the Federal Transit Administration through the conduct of a multi-modal corridor alternatives analysis and selection of a locally preferred alternative (or similar designation) as adopted by the METRO Council and other participating agencies. This will apply to major transit projects that have been identified in local or regional transportation plans and are expected to seek federal funds.
8. Lead the preparation of National Environmental Policy Act (NEPA) documents, including draft and final environmental impact statements in cooperation with SMART and affected local governments, in those corridors where a transit project has been designated as the locally preferred alternative or other similar designation by the METRO Council following completion of a multimodal corridor alternatives analysis or where a locally developed transit project anticipates seeking federal funding.
9. Prepare data as necessary to fulfill the requirements of the Federal Transit Administration's New Starts Reporting requirements.
10. Prepare for METRO Council adoption any ordinances, resolutions, and reports required to meet appropriate federal, state, and regional requirements in the development and advancement of federally funded major transit projects.
11. Conduct air quality conformity determinations for transportation plans, programs, and projects as required by federal and state regulations.
12. Develop, maintain, and analyze transportation-related data and GIS information for use in transportation planning studies.
13. Maintain and update regional travel forecasting models for the Portland metropolitan area, that provide base year and future year travel estimates for person trips, transit trips, and walk/bike trips.
14. Consult with SMART on development of the annual UPWP and include work elements of interest to SMART to the extent feasible within funding constraints.
15. Coordinate with SMART on early, ongoing, and responsive public involvement activities, as required by federal, state, and locally mandated rules and regulations, in the transportation planning and programming process.

SMART Agrees to:

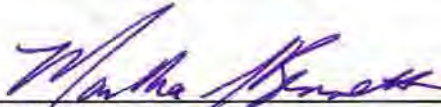
1. Coordinate and consult with METRO on development of transit plans and programs as they relate to performance of the regional transportation system. These include but are not limited to: a short-term Transit Investment Plan, Employee Commute Trip Reduction Plans, ADA Paratransit Service Plans, transit management system planning, development of appropriate ITS architecture, SMART annual service plan, High Capacity Transit (HCT) planning, access to jobs and reverse commute programs, other transit services planning, pedestrian access to transit planning, and park-and-ride facility planning. SMART shall also provide program and policy development guidance and technical

assistance in preparing transit elements of the RTP that relate to the SMART system and its interface with the Tri-County Metropolitan Transportation District of Oregon (TriMet) and other public and private transit providers. This includes development of proposed transit networks for regional travel forecasting models.

2. Coordinate closely with METRO regarding transit system projects requiring a major transportation investment such as a New Starts or Small Starts projects, and the development of related transit Environmental Impact Statements/Preliminary Engineering. Such efforts may include but are not limited to assistance in route and transit system planning, design, and estimating capital and operating costs.
3. Cooperate with METRO to continue to improve the cost-effective delivery of planning and preliminary engineering services where required and to ensure planning and engineering work for New Starts projects are adequately funded.
4. Coordinate with METRO in collection and analysis of transit related data utilized to complete National Transit Database (NTD) reports.
5. Submit the following for review and/or consideration of adoption by JPACT and the METRO Council:
 - a. The short-term Transit Investment Plan with documentation of its consistency with the RTP.
 - b. The annual Paratransit Service Plan with documentation of compliance with Federal regulations and the RTP.
 - c. Projects for inclusion in the MTIP/STIP.
6. Consult with METRO on development of the annual UPWP to include work elements of interest to SMART to the extent feasible within funding constraints.
7. Assist METRO with preparation of the annual Regional Travel Options Report.
8. Coordinate with SMART's JPACT and TPAC representatives to address policy issues that affect transit in the region.
9. Provide annual funding toward work elements of interest to SMART in METRO's transportation planning work program.
10. Coordinate public involvement activities with METRO in the transportation planning and programming process, as required by state and federal planning regulations,

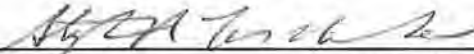
IT IS MUTUALLY AGREED:

The undersigned agencies in the State of Oregon, in accordance with CFR, Chapter 23, Section 450.314 (MPO Agreements) do hereby mutually agree to consult and coordinate in carrying out transportation planning and programming the Portland Urbanized Area as required by this Subpart.



 Martha Bennett
 Chief Operating Officer
 Metro
 4/28/14

 Date



 STEPHAN A. LASHBROOK
 TRANSIT DIRECTOR
 SMART
 4/18/14

 Date

V. OTHER PLANNING RELATED INFORMATION

FY 2018-19 Unified Planning Work Program Funding Summary

3/13/2018

ODOT Key #	FFY 2018 PL ¹	FFY 18 Sec 5303 ²	FY 17 Sec 5303 ² Carryover	STBG ² In Lieu of Dues	STBG ² FY 17 Carryover	TriMet Support	ODOT Support Funds	Corridor & Systems Planning FFY 18 STBG ²	Corridor & Systems Planning FY 17 STBG ² Carryover	RTO STBG/ 5307 ²	TSMO STBG ² FFY 18	Creating Livable Streets STBG ²	EVA STBG ²	RTO ODOT ²	TSMO Strategic Plan STBG ² Funds	SWEDS FTA	Other Anticipated Funds ³	Metro/Local Match	Total
METRO	21271	21271	19801	21271	19281			20887	19294/1929	19290/1929	21041	19843	19902						
General MPO Transportation Planning																			
1 Transportation Planning	665,787	33,759	-	307,521	90,224	-	-	-	-	-	-	-	-	-	-	-	-	49,388	1,146,679
2 Regional Transportation Plan Update	253,272	168,253	77,410	43,913	-	-	-	-	-	-	-	-	-	-	-	-	-	33,143	575,991
3 Regional Transit Strategy	16,230	4,137	-	25,045	45,257	-	-	-	-	-	-	-	-	-	-	-	-	8,520	99,189
4 Metropolitan Transportation Improvement Program (MTIP)	49,999	369,158	-	630,434	44,536	-	-	-	-	-	-	-	-	-	-	-	-	119,505	1,213,632
5 Air Quality Program	43,674	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	43,674
6 Civil Rights	156,544	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	156,544
7 Transportation System Management & Operations (TSMO) - Regional Mobility Program	-	-	-	8,979	-	-	-	-	-	-	69,010	-	-	-	-	-	-	8,926	86,915
8 Transportation System Management & Operations (TSMO) - Regional Travel Options	-	-	-	-	-	-	-	-	-	2,802,835	-	-	-	172,219	-	-	-	130,646	3,105,700
9 Regional Freight Program	-	-	-	49,242	-	-	-	-	-	-	-	-	-	-	-	-	-	5,636	54,878
10 Data Management, Data Visualization and Performance Measurement	211,448	-	-	-	-	236,582	183,490	-	-	-	-	-	-	-	-	-	55,000	911,868	1,598,388
11 Economic Demographic and Land Use Forecasting Maintenance	162,105	-	-	7,286	-	-	-	-	-	-	-	-	-	-	-	-	-	114,966	284,357
12 Travel Forecast Maintenance	659,383	-	-	-	-	19,196	98,527	-	-	-	-	-	-	-	-	-	-	250,652	1,027,758
13 Technical Assistance Program	-	-	-	67,979	-	8,418	25,828	-	-	-	-	-	-	-	-	-	-	7,780	110,005
14 MPO Management and Services	276,999	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	276,999
15 Regional Safety Program	-	-	-	24,774	-	-	-	-	-	-	-	-	-	-	-	-	-	2,835	27,609
MPO Planning Projects																			
1 Mobility Policy Refinement Planning	-	-	-	52,934	-	-	-	-	-	-	-	-	-	-	-	-	-	6,059	58,993
2 Complete Streets	2,500	-	-	26,374	134,271	-	-	-	-	-	-	50,000	-	-	-	-	-	21,856	235,001
3 Transportation System Management & Operations -- Plan Update	-	-	-	-	-	-	-	-	-	-	-	-	-	-	271,728	-	-	31,100	302,828
4 Economic Demographic and Land Use Forecasting Development & Application Program	65,417	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	115,869	181,286
5 Travel Forecast Development & Application	505,473	-	-	-	-	-	15,682	-	-	-	-	-	-	-	-	-	-	-	521,155
6 Corridor Refinement and Project Development	-	-	-	-	136,563	-	-	432,984	-	-	-	-	-	-	-	-	745,777	76,040	1,391,364
7 Powell-Division Transit Corridor Project	-	-	-	-	-	-	-	-	500,000	-	-	-	-	-	-	-	-	57,227	557,227
8 Southwest Corridor Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	216,977	2,159,811	342,486	2,719,274
9 Economic Value Atlas (EVA)	-	-	-	-	-	-	-	-	-	-	-	-	25,557	-	-	-	-	308,781	334,338
10 Red Line Enhancement	-	-	-	-	-	-	-	103,407	-	-	-	-	-	-	-	-	-	25,461	128,868
Metro Subtotal	3,068,831	575,307	77,410	1,244,481	450,851	264,196	323,527	536,391	500,000	2,802,835	69,010	50,000	25,557	172,219	271,728	216,977	2,960,588	2,628,744	16,238,652
GRAND TOTAL	3,068,831	575,307	77,410	1,244,481	450,851	264,196	323,527	536,391	500,000	2,802,835	69,010	50,000	25,557	172,219	271,728	216,977	2,960,588	2,628,744	16,238,652

¹ PL funds include \$1,016,912 carryover from FY 17 and ODOT match

² Federal funds only, no match included

³ Reflects Local Contributions to projects; sales; Regional Bonded Funding via TriMet

V. OTHER PLANNING RELATED INFORMATION

Southwest Washington Regional Transportation Council
Unified Planning Work Program
Placeholder



If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

So, hello. We're Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO.18-4877, FOR THE PURPOSE OF ADOPTING THE FISCAL YEAR 2018-19 UNIFIED PLANNING WORK PROGRAM

Date: April 10, 2018

Prepared by: John Mermin
(503) 797-1747

BACKGROUND

The Unified Planning Work Program (UPWP) is developed annually by Metro as the Metropolitan Planning Organization (MPO) for the Portland Metropolitan Area. It is a federally-required document that serves as a guide for transportation planning activities to be conducted over the course of each fiscal year, beginning July 1.

The UPWP is developed by Metro with input from local governments, TriMet, ODOT, the Port of Portland, FHWA, and FTA. Included in the UPWP are detailed descriptions of the transportation planning tasks, listings of various activities, and a summary of the amount and source of state and federal funds to be used for planning activities.

ANALYSIS/INFORMATION

1. **Known Opposition** – No known opposition
2. **Legal Antecedents** – this resolution adopts a UPWP for the Portland metropolitan area, as defined in Title 23 of the Code of Federal Regulations, Parts 450 and 420, and title 49, of the Code of Federal Regulations, Part 613.
3. **Anticipated Effects** – Approval means that grants can be submitted and contracts executed so work can commence on July 1, 2018 in accordance with established Metro priorities.
4. **Budget Impacts** – Approval of this resolution is a companion to the UPWP. It is a prerequisite to receipt of Federal planning funds and is, therefore, critical to the Metro budget. The UPWP matches projects and studies reflected in the proposed Metro budget submitted by the Metro Chief Operating Officer to the Metro Council. The UPWP is subject to revision in the final adopted Metro budget.

RECOMMENDED ACTION

Approve Resolution No.18-4877 adopting a Unified Planning Work Program for the Fiscal Year 2018-19.

Agenda Item No. 4.3

Resolution No. 18-4888, For the Purpose of Filling a
Vacancy on the Metro Central Station Enhancement
Committee

Consent Agenda

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF FILLING A VACANCY)	RESOLUTION NO. 18-4888
ON THE METRO CENTRAL STATION)	
COMMUNITY ENHANCEMENT COMMITTEE)	Introduced by Councilor Sam Chase in concurrence with Council President Tom Hughes

WHEREAS, Metro Code Chapter 2.19.030, "Membership of the Advisory Committees," states that all members and alternate members of all Metro Advisory Committees shall be appointed by the Council President and shall be subject to confirmation by the Council; and

WHEREAS, Metro Code Chapter 2.19.120, "Metro Central Station Community Enhancement Committee (MCSCE)," provides for the committee; and

WHEREAS, Metro Code Chapter 2.19.120(b)(1) sets forth representation criteria for membership on the committee; and

WHEREAS, a vacancy has occurred in representation of the Environmental Community; and

WHEREAS, the Council President has appointed a representative as set forth in Exhibit "A", subject to confirmation by the Metro Council; now, therefore,

BE IT RESOLVED that the Metro Council confirms the appointment of the Metro Central Station Community Enhancement Committee, as set forth in Exhibit "A" attached hereto.

ADOPTED by the Metro Council this 3rd day of May 2018.

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

Exhibit A to Resolution No. 18-4888
Metro Central Station Community Enhancement Committee Member Confirmation

The following person shall serve the duration of the 2018-2019 committee term vacated by Mary Peveto:

Candice Jimenez Environmental Community

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 18-4888, FOR THE PUROSE OF FILLING A VACANCY ON THE METRO CENTRAL STATION COMMUNITY ENHANCEMENT COMMITTEE

Date: 4/12/18

Prepared by: Rob Nathan, 503-797-1691

BACKGROUND

The Metro Central Station Community Enhancement Committee is charged with helping develop plans to administer grant funds, solicit and review grant applications, and select for funding improvement projects that benefit the area directly affected by Metro Central garbage transfer station including portions of Northwest and North Portland.

Sam Chase, councilor of Metro District 5, chairs the seven-member committee. Members are nominated from their respective neighborhood association: Forest Park, Friends of Cathedral Park, Linnton, the Northwest Industrial Business Association (NIBA) and the Northwest District. One member represents environmental groups with an interest in the grant target area. Members are to serve a two-year term. Two vacancies have occurred on the committee due to term limits. Both the environmental representative seat and NIBA seat are vacant.

A recruitment effort to fill the positions was launched in January 2018 to seek replacements to represent the environmental representative seat and NIBA seat.

We have received one interest form from Donovan Smith of Portland Harbor Community Coalition, and another from Candice Jimenez of the Northwest Portland Area Indian Health Board. Both interest forms are attached to this document. No representative has yet been identified to represent the NIBA.

ANALYSIS/INFORMATION

1. **Known Opposition**

There is no known opposition to appointment of either Donovan Smith or Candice Jimenez to the Metro Central Community Enhancement Committee.

2. **Legal Antecedents**

Chapter 2.19 of the Metro Code Relating to Advisory Committees; Section 2.19.120 provides for a Metro Central Station Community Enhancement Committee and sets forth guidelines for representation.

3. **Anticipated Effects**

Adoption of this resolution would confirm the appointment of Candice Jimenez.

4. Budget Impacts

There are no known costs associated with implementation of this legislation.

RECOMMENDED ACTION

Staff recommends Candice Jimenez to the Metro Central Community Enhancement Committee. Her interest form articulates her passion for community enhancement. In addition, her lived experience with Native communities in the Northwest area, community connections, and experience in Metro's leadership development pilot makes her a well-positioned candidate for this seat.



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

Metro Central Community Enhancement Committee Application for committee membership

Metro seeks community representatives to serve a two-year term (2017-2019) on the Metro Central Enhancement Committee. Each year committee members help solicit and review grant applications, and fund a slate of neighborhood improvement projects that benefit Northwest Portland. This committee funds grants totaling approximately \$250,000 per year. **Deadline for nominations WAS December 1, 2016.**

Funding for the Metro Central Enhancement Committee grants are generated from a \$1 surcharge collected on each ton of garbage taken to Metro's Central Transfer Station, located in Northwest Portland. Funds are used to compensate the community most directly affected by the facility. Since the Metro Central grant program was established in 1991, approximately \$3.9 million has gone to more than 380 local projects. For more details, visit www.oregonmetro.gov/grants.

Sam Chase, councilor of Metro District 5, chairs the seven-member Metro Central enhancement committee. Members must live within the grant target area and must be nominated by their respective neighborhood association. The following positions are open for nominations:

- Forest Park Neighborhood Association
- Friends of Cathedral Park
- Linnton Neighborhood Association
- Northwest Industrial area (NINA)
- Northwest District Association

Members must be confirmed by the Metro Council and serve a two-year term from January 2017 to December 2019. Neighborhood Association representatives must live within the boundary of their respective neighborhood, with the exception of the business representative working with NINA. The committee's environmental representative is confirmed until November 2017.

Metro seeks a mix of committee members that bring experience and expertise including:

- a commitment to community service
- knowledge of the needs of the neighborhood and its unique features
- experience reviewing proposals or with projects that involve community partners
- appreciation of the challenges and benefits of engaging diverse communities.

Duties include:

- serve a two-year term with an opportunity to be reappointed for a second consecutive term
- annually review 20 or more grant applications
- attend three committee meetings annually (2-3 hours each) March, October and November
- develop funding recommendations together with other committee members

To be eligible for consideration, applications for membership must be submitted by the respective Neighborhood Association in which the applicant resides.



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

Metro Central Community Enhancement Program Committee interest form

Please return completed two-page application to:

Metro Regional Center
Attn: Molly Chidsey
Email: Molly.Chidsey@oregonmetro.gov
Questions? Call 503-797-1690

Information

Name: Candice Jimenez_____

Organization or business (optional): Northwest Portland Area Indian Health Board_____

Mailing address: 2121 SW Broadway, Suite 300_____

City: Portland_____ State: OR_____ Zip: 97201_____

Preferred phone: 503-926-4179_____ Email: candicebjimenez@yahoo.com_____

Residential address: 8801 NE Wygant Street, Portland, OR 97220_____

Check one:

- Forest Park Neighborhood Association
- Friends of Cathedral Park
- Linnton Neighborhood Association
- Northwest District Neighborhood Association
- Northwest Industrial area (NINA)

Metro strives for membership on its committee that reflects the diversity of the Portland metro region.

The following demographic information is optional:

Gender: Female_____ Age: 33_____ Race or ethnicity: Confederated Tribes of Warm Springs_____

Briefly describe your interest in the Metro Central Enhancement Committee and why you would like to serve.

As an employee of a non-profit public health organization serving both the regional and urban needs of Native American tribal peoples, I continually realize the critical lens needed for serving local communities where they are located whether that means the marginalized communities surrounding a certain space or those affected by infrastructure in the area such as a waste or recycling facility. I believe it is our duty to be aware of the way that our structural needs can and do have an impact on those around us, as a part of the enhancement committee there exists space to make a positive impact through funding decisions that will be positive and led by the community's needs.



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oregonmetro.gov

Members of the Metro Central Enhancement Committee offer a wide variety of complementary skills and experiences. Please describe your relevant knowledge and experience.

I began my career with the Northwest Portland Area Indian Health Board, a tribal-run organization comprised of the 43 member tribes in Oregon, Washington and Idaho. Since 2013 I have supported tribal-led research related to child passenger safety and pre-teen oral health. I began as a Graduate Research Assistant within the Native CARS Study (Native Children Always Ride Safe) -- a multi-tribe intervention project designed to improve evaluating child passenger restraint use in six Northwest tribes. This project, funded initially the NIH Native American Research Centers for Health (NARCH), has been funded by National Institute of Minority Health & Health Disparities (NIMHD) since 2008. I, and our project team, adhere to the tenets of community-based participatory research while ensuring scientific rigor of trial design and statistical sophistication of the analysis of the group-randomized community interventions. Additionally, I have continued project coordination efforts within the Toddler Obesity and Tooth Decay Prevention (TOTS) to Tweens Study. This study uses a sequential explanatory mixed methods approach while supporting our experienced dental health team investigate quantitative and qualitative factors that may be important in explaining the caries rate in tribal children. Most recently, I've been actively involved in supporting program evaluation and tribal engagement efforts as a Project Coordinator with the Northwest Native American Center of Excellence in partnership with Oregon Health & Science University and Portland State University. Within each of these grant-funded projects there is constant communication with funders as well as ongoing awareness of new grant opportunities in public health.

Please explain how you keep informed and aware of the community's diverse needs and priorities. Summarize any relevant experience working with people of varied backgrounds

During the 2016-2017 year I participated in a yearlong leadership cohort with individual leaders of various backgrounds at the Native American Youth and Family Center under a program led by the Coalition of Communities of Color. Within this program I have developed a network of mentors and relationships that directly brought me into the BRIDGES Metro Pilot program that has allowed space for further leadership development in the Metro programming abroad and included the opportunity to serve on an interview panel within Metro Communications and application for the Enhancement Committee. Through each of these experiences I've developed communication networks across communities and backgrounds that allow me to learn of the needs and priorities of those communities different than mine. It also has allowed me to share the needs and history of the Native American community not only in Portland as the 9th largest Native American population but also across the region. In addition, I follow and am a part of various social justice opportunities and serve on community advisory councils for Health Share of Oregon and Oregon State University College of Public Health and Human Sciences.

Do you anticipate any conflicts of interest that might require you to excuse yourself from the review of any potential project? For example, do you or an immediate family member staff or sit on the board of an organization that might seek a grant from this program? Are you a consultant that might be interested in submitting a proposal for the type of work that this program funds? Please explain.

No. I do not see any potential conflicts of interests that would require me to excuse myself.

Metro Central Community Enhancement Committee Application for committee membership

Metro seeks community representatives to serve a two-year term (2017-2019) on the Metro Central Enhancement Committee. Each year committee members help solicit and review grant applications, and fund a slate of neighborhood improvement projects that benefit Northwest Portland. This committee funds grants totaling approximately \$250,000 per year. **Deadline for nominations WAS December 1, 2016.**

Funding for the Metro Central Enhancement Committee grants are generated from a \$1 surcharge collected on each ton of garbage taken to Metro's Central Transfer Station, located in Northwest Portland. Funds are used to compensate the community most directly affected by the facility. Since the Metro Central grant program was established in 1991, approximately \$3.9 million has gone to more than 380 local projects. For more details, www.oregonmetro.gov/grants.

Sam Chase, councilor of Metro District 5, chairs the seven-member Metro Central enhancement committee. Members must live within the grant target area and must be nominated by their respective neighborhood association. The following positions are open for nominations:

Forest Park Neighborhood Association
Friends of Cathedral Park
Linnton Neighborhood Association
Northwest Industrial area (NINA)
Northwest District Association

Members must be confirmed by the Metro Council and serve a two-year term from January 2017 to December 2019. Neighborhood Association representatives must live within the boundary of their respective neighborhood, with the exception of the business representative working with NINA. The committee's environmental representative is confirmed until November 2017.

Metro seeks a mix of committee members that bring experience and expertise including:

- a commitment to community service
- knowledge of the needs of the neighborhood and its unique features
- experience reviewing proposals or with projects that involve community partners
- appreciation of the challenges and benefits of engaging diverse communities.

Duties include:

- serve a two-year term with an opportunity to be reappointed for a second consecutive term
- annually review 20 or more grant applications
- attend three committee meetings annually (2-3 hours each) March, October and November
- develop funding recommendations together with other committee members

To be eligible for consideration, applications for membership must be submitted by the respective Neighborhood Association in which the applicant resides.

**Metro Central Community Enhancement Program
Committee interest form**

Please return completed two-page application to:

Metro Regional Center
Attn: Molly Chidsey
Email: HYPERLINK "mailto:Molly.Chidsey@oregonmetro.gov" Molly.Chidsey@oregonmetro.gov
Questions? Call 503-797-1690

Information

Name: Donovan Smith_____

Organization or business (optional): _____

Portland Harbor Community Coalition_____

Mailing address: _____

City: Beaverton State: OR_____ Zip: 97007_____

Preferred phone: 503-756-6128 Email: dmsmith106@gmail.com_____

Residential address: _____
15635 SW Snowy Owl Blvd

- Check one:
- Forest Park Neighborhood Association
 - Friends of Cathedral Park
 - Linnton Neighborhood Association
 - Northwest District Neighborhood Association
 - Northwest Industrial area (NINA)

*Metro strives for membership on its committee that reflects the diversity of the Portland metro region.
The following demographic information is optional:*

Gender: M_____ Age: 26 Race or ethnicity: Black American_____

Briefly describe your interest in the Metro Central Enhancement Committee and why you would like to serve.

As an active member of the Portland Harbor Community Coalition, it's important to me to see projects in around the river help alleviate the burden most-impacted communities in this area (typically Black, Brown) have had to bear.

Members of the Metro Central Enhancement Committee offer a wide variety of complementary skills and experiences. Please describe your relevant knowledge and experience.

As a member of the Portland Harbor Community Coalition, I have been a part of a sustained collective effort to ensure environmental and economic justice are at the forefront of a billion dollar federal cleanup of an 11 mile stretch of the Willamette River from Broadway Bridge to Sauvie's Island. Utilizing grassroots organizing, media and other tactics our coalition has been continues to remain a leading voice in the implementation of cleanups that will include private and public agencies -- including Metro who owns one of the major contaminated sites, Willamette Cove.

Please explain how you keep informed and aware of the community's diverse needs and priorities. Summarize any relevant experience working with people of varied backgrounds

As a native Portlander, and fourth generation Oregonian I have seen and experienced firsthand the need for frontline communities voices to continue to be elevated in an increasingly diverse and growing Oregon.

Do you anticipate any conflicts of interest that might require you to excuse yourself from the review of any potential project? For example, do you or an immediate family member staff or sit on the board of an organization that might seek a grant from this program? Are you a consultant that might be interested in submitting a proposal for the type of work that this program funds? Please explain.

Portland Harbor Community Coalition is eligible for funding, and may, but has not committed to seeking funding through this program. If PHCC does decide to pursue this funding, I would disclose this information immediately to the panel.

Agenda Item No. 4.4

Resolution No. 18-4876, 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, Multnomah County, ODOT, and Portland (MA18-07-MAR)

Consent Agenda

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING OR AMENDING) RESOLUTION NO. 18-4876
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,)
MULTNOMAH COUNTY, ODOT, AND)
PORTLAND (MA18-07-MAR)

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, two of the five projects are important safety protective fencing projects that need to be added to the 2018 MTIP and received their funding approval from the Oregon Transportation Commission (OTC) during their December 2017 meeting ; and

WHEREAS, Multnomah County’s Burnside St – Burnside (Willamette River) Bridge East Approach fencing project and the city of Portland’s NE 12th Ave Over I-84 Union Pacific RR Bridge fencing project will construct necessary protective safety/screening fencing providing traveling motorists additional safety, and reflects ODOT’s compliance with Statute (ORS) 366.462 requiring all freeway overpasses constructed after November 4, 1994 to have fences designed to deter persons from throwing objects from the overpasses onto the freeways; and

WHEREAS, Metro’s new SFY19 Planning funding project will provide the require planning funds to cover the identified costs in Metro’s new draft 2018-2019 Unified Planning Work Program currently moving through Metro’s approval process plus ensures the new planning funds allocation can be obligated by July 2018 allowing expenditures to start as of July 2018 as required; and

WHEREAS, the city of Portland’s St Johns Truck Strategy – Phase II proposes a significant scope change to remove the intersection modification to North Portland Rd/Columbia Blvd as a noncritical scope element while keeping it on the side with a plan to potentially fund it later with local System Development Charge funds, and adds approximately \$1.3 million in city local funds keep the project within the revised budget limitations for the remaining scope elements to be able to deliver the project; and

WHEREAS, the funding split from Key 20414, ODOT's Road Safety Audit Implementation will shift \$775,000 to Key 21071, ODOT's SW Naito Pkwy – SW Huber St Phase 2 project, \$40,000 to Key 18789, ODOT's OR213 at S Union Mills Rd project, and \$500,000 to ODOT's project Key 21289 to assist in better fund leveraging of their All Roads Safety Transportation (ARTS) Program; 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 February 2018 Formal MTIP Amendment; and

WHEREAS, all projects included in the February 2018 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 March 9, 2018 and approved the amendment recommendation to JPACT; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on March 15, 2018 to formally amend the 2018-21 MTIP to include the March 2018 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 **18-4876**



Proposed March 2018 Formal Amendment Bundle			
Amendment Type: FORMAL, MA18-07-MAR			
Total Number of Projects: 5			
ODOT Key	Lead Agency	Project Name	Required Changes
Project #1 21284	Multnomah County	Burnside St: Burnside (Willamette River) Bridge East Approach	ADD NEW PROJECT: The project is being added to the 2018 MTIP and is being funded from the bridge overpass protective screening program. Constructing the fence on this freeway overpass will improve safety for motorists.
Project #2 21271	Metro	Portland Metro Planning SFY19	ADD NEW PROJECT: The project is being added to the 2018 MTIP and support required MPO transportation planning activities that USDOT mandates the MPO to complete
Project #3 21283	Portland	NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)	ADD NEW PROJECT: The project is being added to the 2018 MTIP and is being funded from the bridge overpass protective screening program. Constructing the fence on this freeway overpass will improve safety for motorists.
Project #4 18819	Portland	St Johns Truck Strategy Phase II	SCOPE CHANGE: The amendment reflects a significant scope change to the project due to budget limitations. The North Portland Rd/Columbia Blvd intersection realignment is being removed from the project through the formal amendment
Project #5 20414	ODOT	Road Safety Audit Implementation	COST DECREASE/FUNDING SPLIT: This amendment reduces the overall programming amount of committed HSIP to the project. \$1,655,000 in committed funding is being split off this project and re-programmed to Keys 21071, 18789, and 21289.

Exhibit A to Resolution 18-4876

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #1 EXISTING MTIP PROGRAMMING - None New Project

PROJECT #1 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
21284	TBD	Multnomah County	Burnside St: Burnside (Willamette River) Bridge East Approach	Highway	\$ 650,000
Project Description:			On Burnside St at I-5, construct protective fencing for Burnside St Bridge east approach to provide safety to the traveling motorist		

Amended MTIP Fund Programming by Phase

Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Other	Construction	Total
NHPP-FAST	Z001	Federal	2019		\$ 71,784				\$ 71,784
State	Match	State	2019		\$ 8,216				\$ 8,216
NHPP-FAST	Z001	Federal	2020					\$ 511,461	\$ 511,461
State	Match	State	2020					\$ 58,539	\$ 58,539
Total:				\$ -	\$ 80,000	\$ -	\$ -	\$ 570,000	\$ 650,000

- 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 Highways Performance Program (FAST Act) funds
 3. State = General state funds provided by the lead agency in support of the required match to the federal funds.

Amendment Summary

This is a new project being added to the 2018 MTIP. The project will provide protective safety fencing to traveling motorists. The approved funding for this project originates from the bridge overpass screening program. Approval from the Oregon Transportation Commission (OTC) was required for this project. OTC approval occurred during their December 2018 meeting.

Exhibit A to Resolution 18-4876

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new 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
21271	TBD	Metro	Portland Metro Planning SFY19	Other	\$ 4,079,989
Project Description:			For Metro, annual MPO planning funds for federal fiscal year 2019 in support of UPWP and other planning activities the MPO is required to complete.		

Amended MTIP Fund Programming by Phase

Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Other	Construction	Total
STP>200K	Z230	Federal	2018	\$ 1,244,481					\$ 1,244,481
Local	Match	Local	2018	\$ 142,436					\$ 142,436
PL	Z450	Federal	2018	\$ 1,841,187					\$ 1,841,187
State	Match	State	2018	\$ 210,732					\$ 210,732
5303	Z277D	Federal	2018	\$ 575,307					\$ 575,307
Local	Match	Local	2018	\$ 65,846					\$ 65,846
Total:				\$ 4,079,989	\$ -	\$ -	\$ -	\$ -	\$ 4,079,989

Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
	2. STP>200K = Federal Surface Transportation Program funds allocated to urban MPO areas with populations greater than 200,000
	3. State = General state funds provided by the lead agency in support of the required match to the federal funds.
	4. PL = Federal planning funds normally allocated to the MPO in support of required planning activities
	5. 5303 = Federal transit planning funds allocated to support transit related planning activities
	6. Local = General local funds the lead agency provides in support of the required match to the federal funds.

Amendment Summary

This is a new project being added to the 2018 MTIP. Per agreement with USDOT, the planning funds are authorized to be programmed in FFY 2018 with a planned obligation at the beginning of the 2019 State Fiscal Year 2019 (July 2018). Funding is allocated to Metro to complete various required planning activities in support of the Regional Transportation Plan (RTP). Metropolitan Transportation Improvement Program (MTIP), and other regional transportation planning studies

Exhibit A to Resolution 18-4876

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #3 EXISTING MTIP PROGRAMMING - None New Project

PROJECT #3 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
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21283	TBD	Portland	NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)	Highway	\$ 250,000
Project Description:			On NE 12th Ave over I-84, construct protective fencing for the 12th Ave bridge to provide safety to the traveling motorist		

Amended MTIP Fund Programming by Phase

Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Other	Construction	Total
NHPP-FAST	Z001	Federal	2019		\$ 40,378				\$ 40,378
State	Match	State	2019		\$ 4,622				\$ 4,622
NHPP-FAST	Z001	Federal	2020					\$ 183,946	\$ 183,946
State	Match	State	2020					\$ 21,054	\$ 21,054
Total:				\$ -	\$ 45,000	\$ -	\$ -	\$ 205,000	\$ 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 Highways Performance Program (FAST Act) funds
 3. State = General state funds provided by the lead agency in support of the required match to the federal funds.

Amendment Summary

This is a new project being added to the 2018 MTIP. The project will provide protective safety fencing to traveling motorists. The approved funding for this project originates from the bridge overpass screening program. Approval from the Oregon Transportation Commission (OTC) was required for this project. OTC approval occurred during their December 2018 meeting.

Exhibit A to Resolution 18-4876

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #4 EXISTING MTIP PROGRAMMING									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
18819	70773	Portland	St Johns Truck Strategy Phase II					Highway	\$ 3,345,990
Project Description:		Freight mobility - bicycle and pedestrian safety improvements							
Existing MTIP Project Fund Programming by Phase									
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
State STP-FLX	M240	Federal	2016		\$ 733,764				\$ 733,764
Local	Match	Local	2016		\$ 83,983				\$ 83,983
State STP-FLX	M240	Federal	2017			\$ 78,334			\$ 78,334
Local	Match	Local	2017			\$ 8,966			\$ 8,966
State STP-FLX	M240	Federal	2018				\$ 2,190,258		\$ 2,190,258
Local	Match	Local	2018				\$ 250,685		\$ 250,685
Total:				\$ -	\$ 817,747	\$ 87,300	\$ 2,440,943	\$ -	\$ 3,345,990
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. The funding is still committed to the project, but is now obligated in a prior year outside of the current 2018 MTIP. The funding in that year is referred to as "prior obligated". 3. State STP-FLX = Federal Surface Transportation Program (Flex) allocated and managed by ODOT 4. Local = local funds the lead agency commits to the project as part of the required match to the awarded federal funds.								

Amendment Summary

Above reflects current pre-amendment project programming. Proposed amended changes are stated on the next page

PROJECT #4 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
18819	70773	Portland	St Johns Truck Strategy Phase II	Highway	\$ 4,519,092

Project Description: ~~Freight mobility—bicycle and pedestrian safety improvements-~~
Construct roadway safety improvements to N Lombard, N Fessenden/St Louis, and N Columbia Way corridors.

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
TIFIA	M040	Federal	2016		\$ 733,764				\$ 733,764
Local	Match	Local	2016		\$ 83,983				\$ 83,983
OTHER	OTH0	Local	2018			\$ 138,045			\$ 138,045
State STP-FLX	M240	Federal	2018				\$ 2,268,592		\$ 2,268,592
Local	Match	Local	2018				\$ 259,651		\$ 259,651
OTHER	OTH0	Local	2018				\$ 1,035,057		\$ 1,035,057
									\$ -
Total:				\$ -	\$ 817,747	\$ 138,045	\$ 3,563,300	\$ -	\$ 4,519,092

- 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. TIFIA = Federal funds that were re-distributed back to the States during 2015 for additional programming needs.
 4. OTHER = Local funds contributing to the project that are not local matching funds, but are to cover the phase costs or used as local overmatch.
 5. State STP-FLX = Federal Surface Transportation Program (Flex) allocated and managed by ODOT
 6. Local = local funds the lead agency commits to the project as part of the required match to the awarded federal funds.

Amendment Summary

The amendment reflects a major scope change to the project due to budget limitations. The initial North Portland Rd/ Columbia Blvd intersection planned scope improvement is being removed from the project. The updated cost estimate for all three scope elements exceeded the available project funding. The updated cost estimate with all three scope activities totals \$7.4 million. The North Portland RD/Columbia Blvd intersection improvement costs have been estimate now at \$3.04 million. The removal of the North Portland Rd/Columbia Blvd intersection enables the other two scope elements for traffic calming to N St Louis/Fessenden, and safety improvements to North Lombard can continue as part of the project and are considered higher priorities. Removing the North Portland Rd/Columbia Blvd scope eliminates a planned re-alignment of the intersection geometry and replacement of a traffic signal. The City is considering completing these improvements at a later date. The project also adds storm water mitigation management to the scope for the North St Johns/Lombard intersection.

Exhibit A to Resolution 18-4876

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #5 EXISTING MTIP PROGRAMMING										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20414	70970	ODOT	Road Safety Audit Implementation					Local Road	\$ 3,034,244	
Project Description:			Address unanticipated safety improvements as identified							
Existing MTIP Project Fund Programming by Phase										
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
HSIP-FAST	ZS30	Federal	2019					\$ 3,034,244	\$ 3,034,244	
									\$ -	
Total:			\$ -	\$ -	\$ -	\$ -	\$ 3,034,244	\$ 3,034,244		

PROJECT #5 PROPOSED AMENDED CHANGES										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20414	70970	ODOT	Road Safety Audit Implementation					Local Road	\$ 1,719,244	
Project Description:			Address unanticipated safety improvements as identified							
Amended MTIP Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
HSIP-FAST	ZS30	Federal	2019					\$ 1,719,244	\$ 1,719,244	
									\$ -	
Total:			\$ -	\$ -	\$ -	\$ -	\$ 1,719,244	\$ 1,719,244		

- 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
 3. HSIP-FAST = Federal Highway Safety Improvement Program funding (from the FAST Act) allocated to and managed by ODOT. This HSIP fund category = 100% federal funds with no required matching funds.

Amendment Summary

This amendment reduces the authorized funding to the project which was split off and planned to be committed to other projects. \$775k is split to Key 21071 OR99OR99W: SW Naito Pkwy - SW Huber St Phase 2 as approved by OTC on 5/18/17 and \$40,000 to K18789 OR213 at S Union Mills Rd and \$500,000 to K21289 as approved by OTC on 1/18/18

Memo

Date: Friday, April 20, 2018
 To: Metro Council and Interested Parties
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: March 2018 MTIP Formal Amendment plus Approval Request of Resolution 18-4876

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, MULTNOMAH COUNTY, ODOT AND PORTLAND (MA18-07-MAR)

BACKGROUND

What this is:

The March 2018 Formal Metropolitan Transportation Improvement Program (MTIP) Amendment bundle contains required changes and updates impacting Metro, Multnomah County, ODOT and Portland. Five projects are included in the amendment bundle. Three of the five projects in the March 2018 bundle are new projects being added to the 2018 MTIP. They are summarized in the below table:

2018-2021 Metropolitan Transportation Improvement Program Exhibit A to Resolution 18-4876			
Proposed March 2018 Formal Amendment Bundle Amendment Type: FORMAL, MA18-07-MAR Total Number of Projects: 5			
ODOT Key	Lead Agency	Project Name	Required Changes
Project #1 21284	Multnomah County	Burnside St: Burnside (Willamette River) Bridge East Approach	ADD NEW PROJECT: The project is being added to the 2018 MTIP and is being funded from the bridge overpass protective screening program. Constructing the fence on this freeway overpass will improve safety for motorists.
Project #2 21271	Metro	Portland Metro Planning SFY19	ADD NEW PROJECT: The project is being added to the 2018 MTIP and support required MPO transportation planning activities that USDOT mandates the MPO to complete
Project #3 21283	Portland	NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)	ADD NEW PROJECT: The project is being added to the 2018 MTIP and is being funded from the bridge overpass protective screening program. Constructing the fence on this freeway overpass will improve safety for motorists.
Project #4 18819	Portland	St Johns Truck Strategy Phase II	SCOPE CHANGE: The amendment reflects a significant scope change to the project due to budget limitations. The North Portland Rd/Columbia Blvd intersection realignment is being removed from the project through the formal amendment
Project #5 20414	ODOT	Road Safety Audit Implementation	COST DECREASE/FUNDING SPLIT: This amendment reduces the overall programming amount of committed HSIP to the project. \$1,655,000 in committed funding is being split off this project and re-programmed to Keys 21071, 18789, and 21289.

What is the requested action?

JPACT approves Resolution 18-4876 and requests the Metro Council's final approval for resolution 18-4876 enabling the five identified projects to be amended correctly into the 2018 MTIP with final approval to occur from USDOT.

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

1. Project: Burnside St: Burnside (Willamette River) Bridge East Approach	
Lead Agency:	Multnomah County
ODOT Key Number:	21284 MTIP ID Number: TBD
Project Description:	On Burnside St at I-5, construct protective fencing for Burnside St Bridge east approach to provide safety to the traveling motorist
What is changing?	Through this formal amendment, the new project is being added to the 2018 MTIP.
Additional Details:	<p><u>From the December 2017 OTC Staff Report:</u></p> <p>Oregon Revised Statute (ORS) 366.462 requires that all freeway overpasses constructed after November 4, 1993 have fences that are designed to deter persons from throwing objects from the overpasses onto the freeways. This statute also requires that the Oregon Department of Transportation (ODOT) develop a prioritization system to construct fences first on those overpasses that involve the greatest risks, and to construct at least 15 fences per year on existing freeway overpasses.</p> <p>Currently 12 freeway overpasses in Region 1 do not have fences. The intent is to complete the fences on these remaining freeway overpasses as part of the 2018-2021 STIP.</p> <p>The Burnside Bridge (bridge 00511) is owned by Multnomah County. The eastern approaches (bridge 00511B) cross over Interstate 5, three Interstate 5 connections, and several rail lines. Constructing the fence on this freeway overpass will improve safety for motorists and move ODOT closer to completion of this program. Since this local agency bridge crosses a freeway, the state will provide the funding to install the fencing. ODOT prioritized this location because this bridge has sidewalks and is in an urban area. Funding for this project will come from the bridge overpass protective screening program. The budget for this program is \$1.5 million per year.</p>
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal amendment.
Total Programmed Amount:	\$80,000 of National Highway Performance Program (NHPP) + match for Preliminary Engineering plus \$570,000 of NHPP + match for the Construction phase for a total programmed amount of \$650,000
Added Notes:	OTC approval required and occurred during their December 2017 meeting.

2. Project: Portland Metro Planning SFY2019	
Lead Agency:	Metro
ODOT Key Number:	21271 MTIP ID Number: TBD
Project Description:	For Metro, annual MPO planning funds for federal fiscal year 2019 in support of UPWP and other planning activities the MPO is required to complete.
What is changing?	This is a new project being added to the 2018 MTIP. Per agreement with USDOT, the planning funds are authorized to be programmed in FFY 2018 with a planned obligation at the beginning of the 2019 State Fiscal Year (July 2018).
Additional Details:	<p>The STP/STBG, PL, and 5303 Planning funds are allocated to Metro on an annual basis directly from ODOT-Salem and are used to fund the required activities within the Unified Planning Work Program (UPWP). These activities are required planning activities approved by USDOT and are in compliance with 23 CFR 450.308 and 23 450.420</p> <p>Funding is allocated to Metro to complete various required planning activities identified in the annual UPWP that support the RTP and other regionally significant transportation studies and activities. A few examples of transportation planning</p>

	<p>areas the UPWP funds support include the following:</p> <ul style="list-style-type: none"> - RTP development and management activities - MTIP development, management, and amendment - Regional Transit Strategies - Air Quality program - Designing Livable Streets - Public involvement - Title VI – Environmental Justice - Transportation Systems Management and Operations (TSMO) – Regional Mobility Program - TSMO – Regional Travel Options - Regional Freight Program <p>The Planning funds also support technical areas the MPO must complete including:</p> <ul style="list-style-type: none"> - Geographic Information Systems – Mapping and Land Formation - Economic Demographic and Land Use Forecasting - Model Development Program - Behavior Based Freight Model <p>Finally, the Planning funds support areas within the MPO to complete required administrative services and special corridor planning studies and project of regional significance.</p> <p>The complete list of planning and administrative activities, their scope of work and estimated costs the annual Planning funds support can be seen in the UPWP Metro produces each year.</p>
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal amendment.
Total Programmed Amount:	Includes \$1,244,481 of STP>200k + match, and \$1,841,187 of PL + match and \$575,307 of 5303 + local match = a total programming amount of \$4,079,989
Added Notes:	UPWP planning fund allocations occur around the same time as the new draft UPWP is moving forward through the approval process.

3. Project:	NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)		
Lead Agency:	Portland		
ODOT Key Number:	21283	MTIP ID Number:	TBD
Project Description:	On NE 12th Ave over I-84, construct protective fencing for the 12th Ave bridge to provide safety to the traveling motorist		
What is changing?	The amendment adds a new project to the 2018 MTIP. <u>From the December 2017 OTC Staff Report:</u>		
Additional Details:	<p>The project will provide protective safety fencing to traveling motorists. The approved funding for this project originates from the bridge overpass screening program. Funding for this project will come from the bridge overpass protective screening program. The budget for this program is \$1.5 million per year.</p> <p>Oregon Revised Statute (ORS) 366.462 requires that all freeway overpasses constructed after November 4, 1993 have fences that are designed to deter persons from throwing objects from the overpasses onto the freeways. This statute also requires that the Oregon Department of Transportation (ODOT) develop a prioritization system to construct fences first on those overpasses that involve the greatest risks, and to construct at least 15 fences per year on existing freeway overpasses.</p>		

	<p>Currently 12 freeway overpasses in Region 1 do not have fences. The intent is to complete the fences on these remaining freeway overpasses as part of the 2018-2021 STIP.</p> <p>The Northeast 12th Avenue over Interstate 84 and Union Pacific Railroad Bridge (bridge 07039) is owned by the City of Portland. Constructing the fence on this freeway overpass will improve safety for motorists and move ODOT closer to completion of this program. Since this local agency bridge crosses a freeway, the state will provide the funding to install the fencing. This location was prioritized because this bridge has sidewalks, and is located within one block of Benson High School</p>
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal MTIP amendment
Total Programmed Amount:	The project is programmed with \$45,000 of federal National Highway Performance Program (NHPP) + match for Preliminary Engineering plus \$205,000 of NHPP + match for construction for a total programming amount of \$250,000
Added Notes:	Approval from the Oregon Transportation Commission (OTC) was required for this project. OTC approval occurred during their December 2017 meeting.

4. Project: St Johns Truck Strategy II	
Lead Agency:	Portland
ODOT Key Number:	18819
MTIP ID Number:	70773
Project Description:	<p>Freight mobility – bicycle and pedestrian safety improvements Construct roadway safety improvements to N Lombard, N Fessenden/St Louis, and N Columbia Way corridors.</p>
What is changing?	<p>The primary project initially included three main safety improvement design elements to construct which included (1) traffic calming on N St Louis/ Fessenden, (2) safety Improvements to N Lombard, and (3) Intersection modifications to N Portland Rd/ Columbia Blvd. However, updated cost estimates revealed the three scope elements would significantly exceed the amount of grant funding for the project.</p> <p>The amendment reflects a major scope change to the project due to budget limitations. The initial North Portland Rd/ Columbia Blvd intersection planned scope improvement is being removed from the project. The updated cost estimate with all three scope activities totals \$7.4 million. The North Portland Rd/Columbia Blvd intersection improvement costs have been estimated now at \$3.04 million.</p> <p>The change does not significantly affect the original Intent of the project. The primary design objective is to reduce the attractiveness of using N St Louis/ Fessenden as an alternative route for freight traffic through the St Johns neighborhood, and instead use the designated freight route around the neighborhood.</p> <p>The earlier Implementation phase of the truck strategy constructed most of significant improvements to encourage freight to use the designated freight route within the strategy. The remaining freight route Improvements will be constructed via the current phase (on N Lombard west of St Louis Ave). The current phase also plans to construct the most significant disincentive element of the strategy, which is traffic calming and pedestrian crossing safety Improvements on N St Louis and Fessenden.</p> <p>The final disincentive element is the intersection improvements at N Portland Rd/ Columbia Blvd Intersection, but are not considered as effective as the traffic calming, and may not even be necessary If the traffic calming element performs well. PBOT</p>

	<p>plans to evaluate the effectiveness of traffic calming Improvements upon completion in terms of reducing cut-through fright traffic. The evaluation will be based primarily on an assessment of how much cut-through truck traffic is still using N St Louis/ Fessenden. If more disincentives are needed, and final phase that constructs the N Portland Rd/ Columbia Blvd improvements will be initiated with planned System Development Charge funds allocated to the St Johns Truck Strategy.</p> <p>The City of Portland is now proposing to refine the scope and add funds to include the following:</p> <ul style="list-style-type: none"> • Add curb ramp replacements to meet American Disabilities Act (ADA) regulation. • Add storm water management facilities to project as to meet federal and city requirements. • Remove the intersection re-alignment of the North Portland Road/Columbia Boulevard. The remaining elements are sufficient to achieve the full intent of the project. • Increase the total right-of-way budget to \$138,045 to accommodate for design modifications that now require additional temporary construction easements. • Increase the estimated construction budget to \$3,563,300 to address new Portland Bureau of Transportation (PBOT) pavement restoration standards. <p>The removal of the North Portland Rd/Columbia Blvd intersection enables the other two scope elements for traffic calming to N St Louis/Fessenden, and safety improvements to North Lombard can continue as part of the project, and are considered higher priorities. Removing the North Portland Rd/Columbia Blvd scope eliminates a planned re-alignment of the intersection geometry and replacement of a traffic signal.</p> <p>The federal funding for the project originates from ODOT. As a result, ODOT has participated in the reviews and final recommendations for the project’s revised scope of work.</p>
Additional Details:	The City is considering completing the removed improvements at a later date. The revised project scope also adds storm water mitigation management to the scope for the North St Johns/Lombard intersection as a result of the reviews.
Why a Formal amendment is required?	The change to the project reflects a significant scope change which requires a formal MTIP Amendment per the FHWA/FTA MTIP STIP Amendment Matrix
Total Programmed Amount:	The total project programmed amount increases from \$3,345,990 to \$4,519,092. The city of Portland is providing an additional \$1,035,057 in local funds for the construction phase to cover the remaining major scope elements.
Added Notes:	OTC approval is also required. The item went before the OTC during their March 2018 meeting and was approved.

5. Project:	Road Safety Audit Implementation		
Lead Agency:	ODOT		
ODOT Key Number:	20414	MTIP ID Number:	70980
Project Description:	Address unanticipated safety improvements as identified		
What is changing?	The amendment reduces the current HSIP funding amount of \$3,034,244 to \$1,719,244 by splitting off existing funding and committing it to other existing ARTS projects		
Additional Details:	<p><u>From the 10/18/2018 OTC Staff Letter:</u></p> <p>The Oregon Department of Transportation (ODOT) conducted a Road Safety Audit (RSA) in July 2015 on Oregon 99 West (Barbur Boulevard) to identify system-wide and location-specific safety issues including short, intermediate, and long term</p>		

	<p>recommendations for improving safety on Oregon 99 West between Southwest Naito Parkway to Southwest Huber Street in the City of Portland. ODOT has since committed to using the recommendations from the RSA to select and fund projects that support goals for short and intermediate term improvements that will improve safety on the corridor.</p> <p>The Barbur RSA report identified inconsistent signage as one of the key safety issues of Southwest Barbur corridor between Naito Parkway and Capitol Highway and suggested overhead signing to increase sign visibility and improve way finding. ODOT evaluated and prioritized recommendations provided by the Barbur RSA team and identified two overhead signs for priority implementation to improve safety in the corridor: Northbound Oregon 99 West :</p> <ul style="list-style-type: none"> • MP 2.01 – south of Southwest Barbur at Southwest Naito Parkway Split, and • MP 2.2 – north of Southwest Bancroft Street. <p>If the signs are not constructed at these locations, it is possible that ODOT will not fulfill all the safety improvement recommendations in the Barbur Road Safety Audit which could result in more crashes on the corridor.</p> <p>The total cost for the project is approximately \$775,000 and will come from funds set aside in the 2018-2021 Draft STIP from the All Roads Transportation Safety (ARTS) Program to implement the RSA findings.</p>
<p>Why a Formal amendment is required?</p>	<p>Cost changes above 20% to projects with than exiting cost of \$1 million or more require a formal MTIP Amendment</p>
<p>Total Programmed Amount:</p>	<p>The project is programmed 100% federal HSIP (no local or state matching funds required) currently at \$3,034,244. The three funding splits reduce the HSIP programming to \$1,719,244.</p>
<p>Added Notes:</p>	<p>OTC approval was required and occurred during their 1/18/2018 meeting</p>

Note: The Amendment Matrix at right is included as a reference the rules and justification for Formal Amendment and Administrative Modifications that the MPOs and ODOT must follow

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

ODOT-FTA-FHWA Amendment Matrix	
Type of Change	
FULL AMENDMENTS	
1. Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized	
2. Major change in project scope. Major scope change includes: <ul style="list-style-type: none"> • Change in project termini - greater than .25 mile in any direction • Changes to the approved environmental footprint • Impacts to AQ conformity • Adding capacity per FHWA Standards • Adding or deleting worktype 	
3. Changes in Fiscal Constraint by the following criteria: <ul style="list-style-type: none"> • FHWA project cost increase/decrease: <ul style="list-style-type: none"> • Projects under \$500K – increase/decrease over 50% • Projects \$500K to \$1M – increase/decrease over 30% • Projects \$1M and over – increase/decrease over 20% • All FTA project changes – increase/decrease over 30% 	
4. Adding an emergency relief permanent repair project that involves substantial change in function and location.	
ADMINISTRATIVE/TECHNICAL ADJUSTMENTS	
1. Advancing or Slipping an approved project/phase within the current STIP (If slipping outside current STIP, see Full Amendments #2)	
2. Adding or deleting any phase (except CN) of an approved project below Full Amendment #3	
3. Combining two or more approved projects into one or splitting an approved project into two or more, or splitting part of an approved project to a new one.	
4. Splitting a new project out of an approved program-specific pool of funds (but not reserves for future projects) or adding funds to an existing project from a bucket or reserve if the project was selected through a specific process (i.e. ARTS, Local Bridge...)	
5. Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data.	
6. Changing name of project due to change in scope, combining or splitting of projects, or to better conform to naming convention. (For major change in scope, see Full Amendments #2)	
7. Adding a temporary emergency repair and relief project that does not involve substantial change in function and location.	

- 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 March 2018 Formal MTIP amendment will include the following:

<u>Action</u>	<u>Target Date</u>
● Initiate the required 30-day public notification process.....	February 26, 2018
● TPAC notification and approval recommendation.....	March 9, 2018
● Completion of public notification process.....	March 27, 2018
● JPACT approval and recommendation to Council.....	April 19, 2018
● Metro Council approval.....	May 3, 2018*

*Note: If any significant public comments are received that are deemed necessary for review by JPACT, the impacted projects or complete amendment will be pulled from the Metro Council agenda and returned to JPACT for their review and direction.

USDOT Approval Steps:

<u>Action</u>	<u>Target Date</u>
● Metro development of amendment narrative package	May 4 , 2018
● Amendment bundle submission to ODOT for review.....	May 7, 2018

- Submission of the final amendment package to USDOT..... May 11, 2018
- ODOT clarification and approval..... Late May , 2018
- USDOT clarification and final amendment approval..... Late May 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:

JPACT recommends the approval of Resolution 18-4876. (*TPAC approval 3/9/2018, JPACT approval on 4/19/18*)

Attachment: Project Location Maps and OTC Staff Report copies

Date: Friday, April 20, 2018
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: Attachment 1 to the March 2018 MTIP Formal Amendment Staff Report – Project Location Maps & OTC letters as applicable

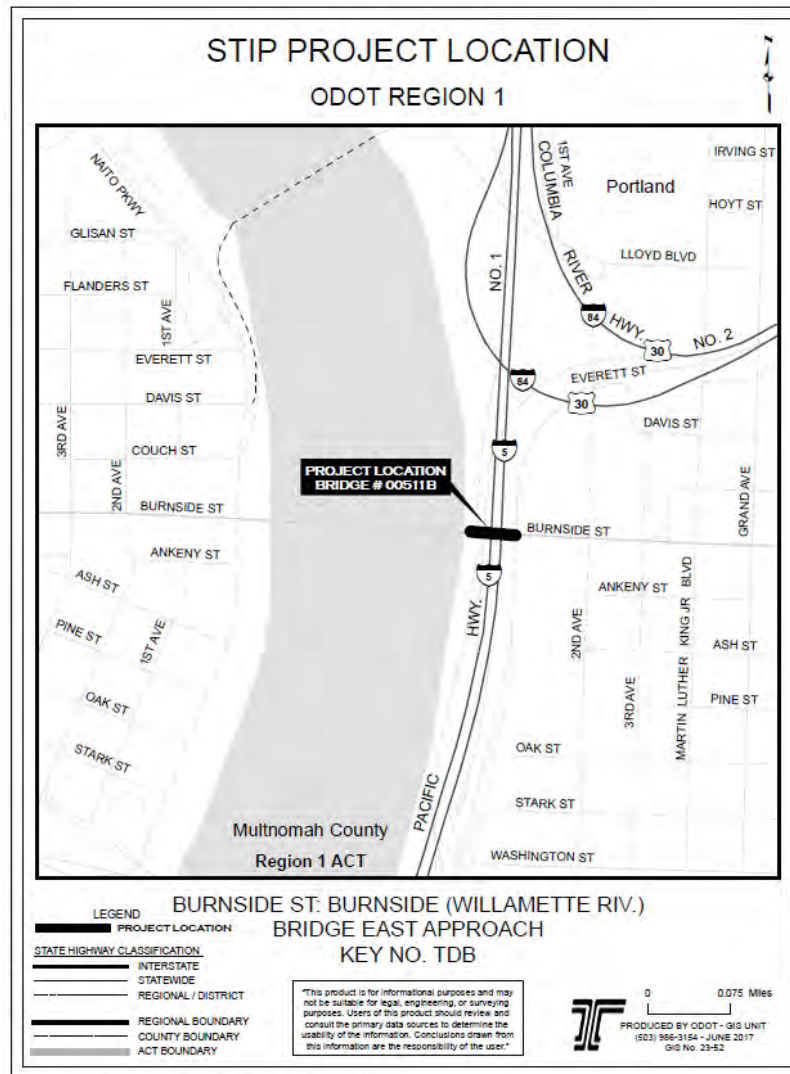
BACKGROUND

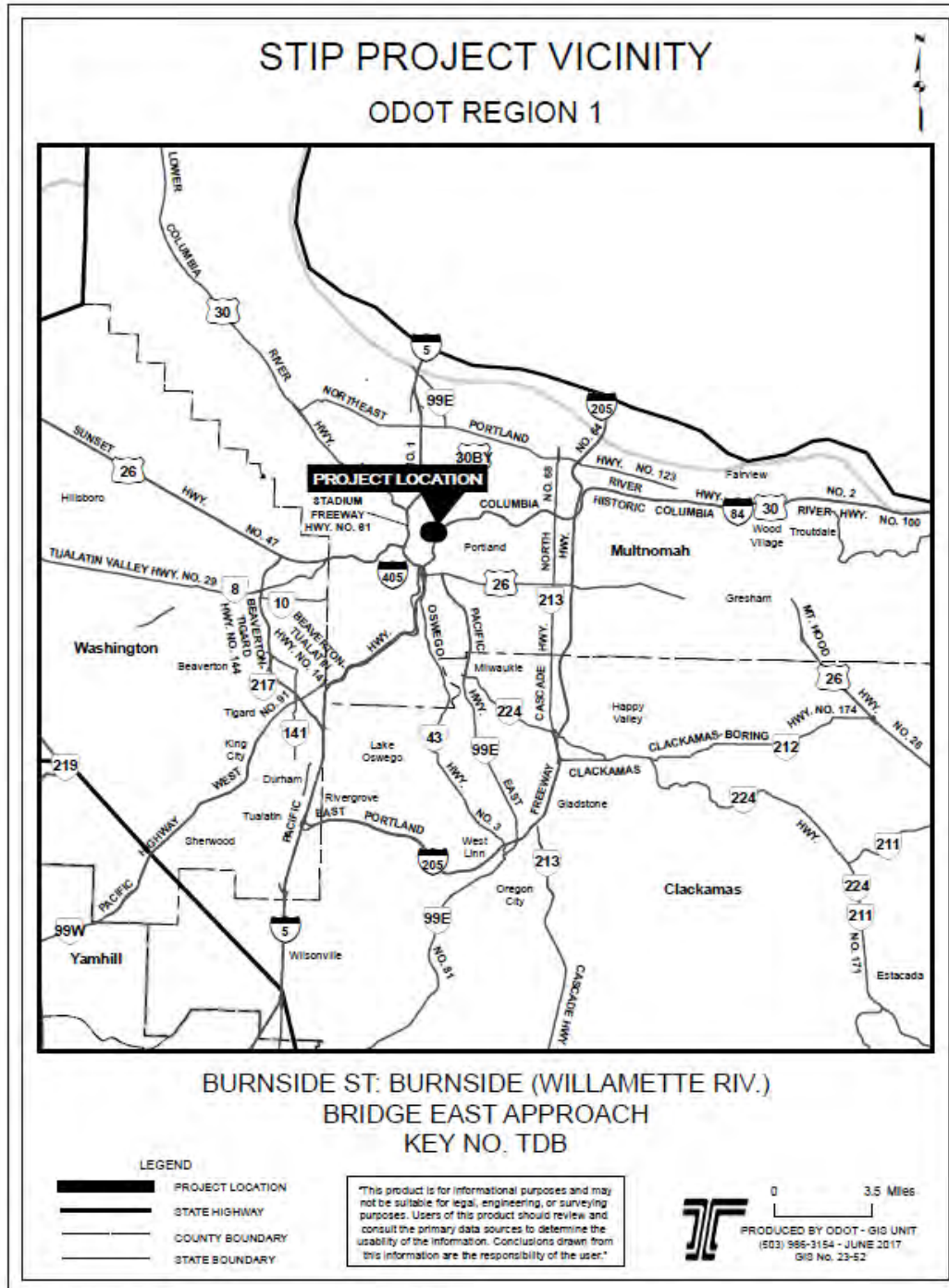
Available project location maps and OTC request letters are included in this attachment to the staff report for reference for their applicable projects. Maps and/or OTC letters are included for:

- Key 21284 – Burnside St: Burnside (Willamette River) Bridge East Approach
- Key 21283 – NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)
- Key 18819 – St Johns Truck Strategy Phase II
- Key 20414 – Road Safety Audit Implementation

Key 21284

Burnside St: Burnside (Willamette River) Bridge East Approach





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OTC Letter for Key 21284



Oregon
Kate Brown, Governor

Oregon Transportation Commission
Office of the Director, MS 11
355 Capitol St NE
Salem, OR 97301-3871

DATE: December 4, 2017
TO: Oregon Transportation Commission

[Original signature on file]

From: Matthew L. Garrett
Director

SUBJECT: Consent 12 - Amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to add one new project, Burnside Street: Burnside (Willamette River) Bridge east approach.

Requested Action:

Request approval to amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to add one new project, protective fencing for Burnside Street: Burnside (Willamette River) Bridge east approach, located in Region 1, Multnomah County. The total estimated cost for this project is \$650,000.

Funding for this project will come from the bridge overpass protective screening program. The budget for this program is \$1.5 million per year.

STIP Amendment Funding Sources

Project	Proposed Funding
Bridge Overpass Protective Screening FFY 2019 (KN 20082)	\$199,598
Bridge Overpass Protective Screening FFY 2020 (KN 20083)	\$450,402
TOTAL	\$650,000

Project to be added

Burnside Street: Burnside (Willamette River) Bridge east approach (KN TBD)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2019	\$0	\$80,000
Right of Way	N/A	N/A	N/A
Utility Relocation	N/A	N/A	N/A
Construction	2020	\$0	\$570,000
	TOTAL	N/A	\$650,000

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Background:

Oregon Revised Statute [\(ORS\) 366.462](#) requires that all freeway overpasses constructed after November 4, 1993 have fences that are designed to deter persons from throwing objects from the overpasses onto the freeways. This statute also requires that the Oregon Department of Transportation (ODOT) develop a prioritization system to construct fences first on those overpasses that involve the greatest risks, and to construct at least 15 fences per year on existing freeway overpasses.

Currently 12 freeway overpasses in Region 1 do not have fences. The intent is to complete the fences on these remaining freeway overpasses as part of the 2018-2021 STIP.

The Burnside Bridge (bridge 00511) is owned by Multnomah County. The eastern approaches (bridge 00511B) cross over Interstate 5, three Interstate 5 connections, and several rail lines. Constructing the fence on this freeway overpass will improve safety for motorists and move ODOT closer to completion of this program. Since this local agency bridge crosses a freeway, the state will provide the funding to install the fencing. ODOT prioritized this location because this bridge has sidewalks and is in an urban area.

With Commission approval, this screening project can proceed to provide safety to the traveling motorists by designing and installing the protective screening and deter individuals from throwing objects onto the freeway. Without approval, this location will continue to provide opportunities for individuals to throw objects onto the freeway.

Attachments:

- Attachment 1 - Location and Vicinity Maps

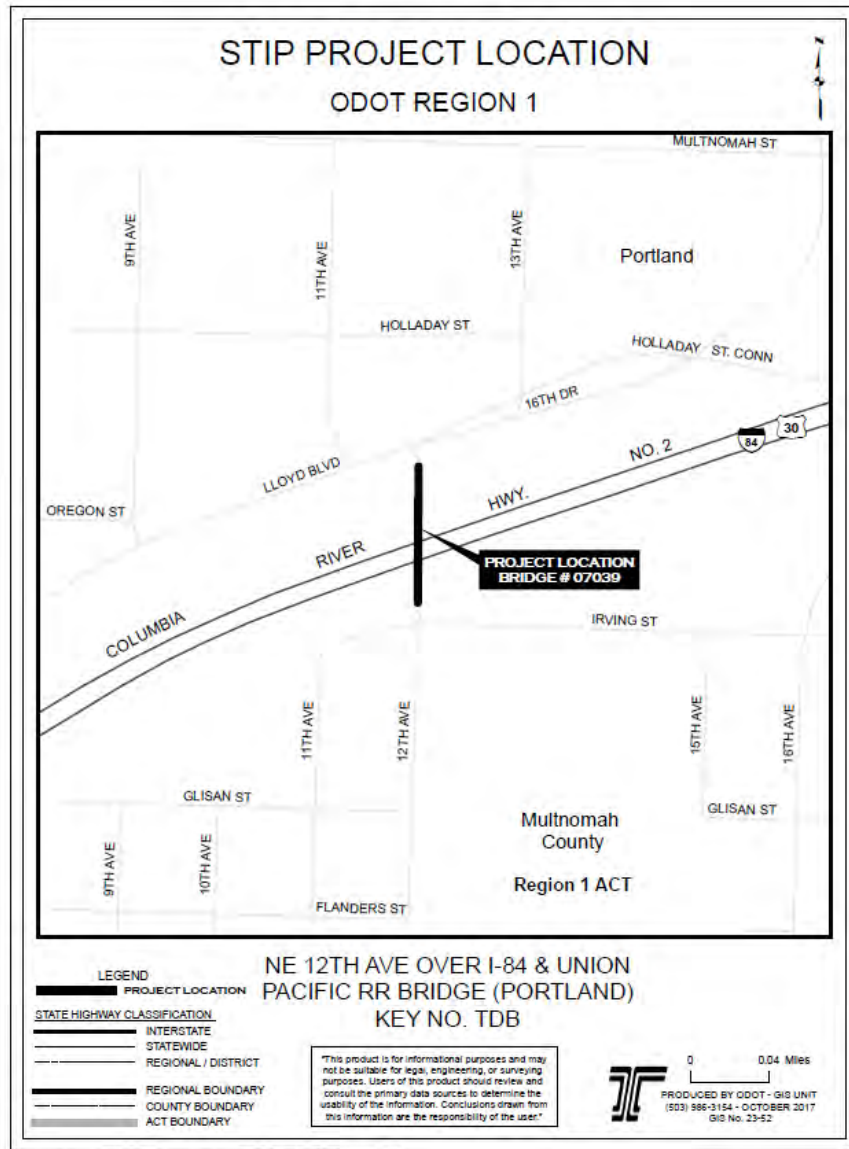
Copies (w/attachment) to:

Jerri Bohard	Travis Brouwer	Tom Fuller	Bob Gebhardt
Paul Mather	McGregor Lynde	Rian Windsheimer	Vaughan Rademeyer
Arlene Santana	Amanda Sandvig	Jeff Flowers	Lynn Averbek
Rachelle Nelson			

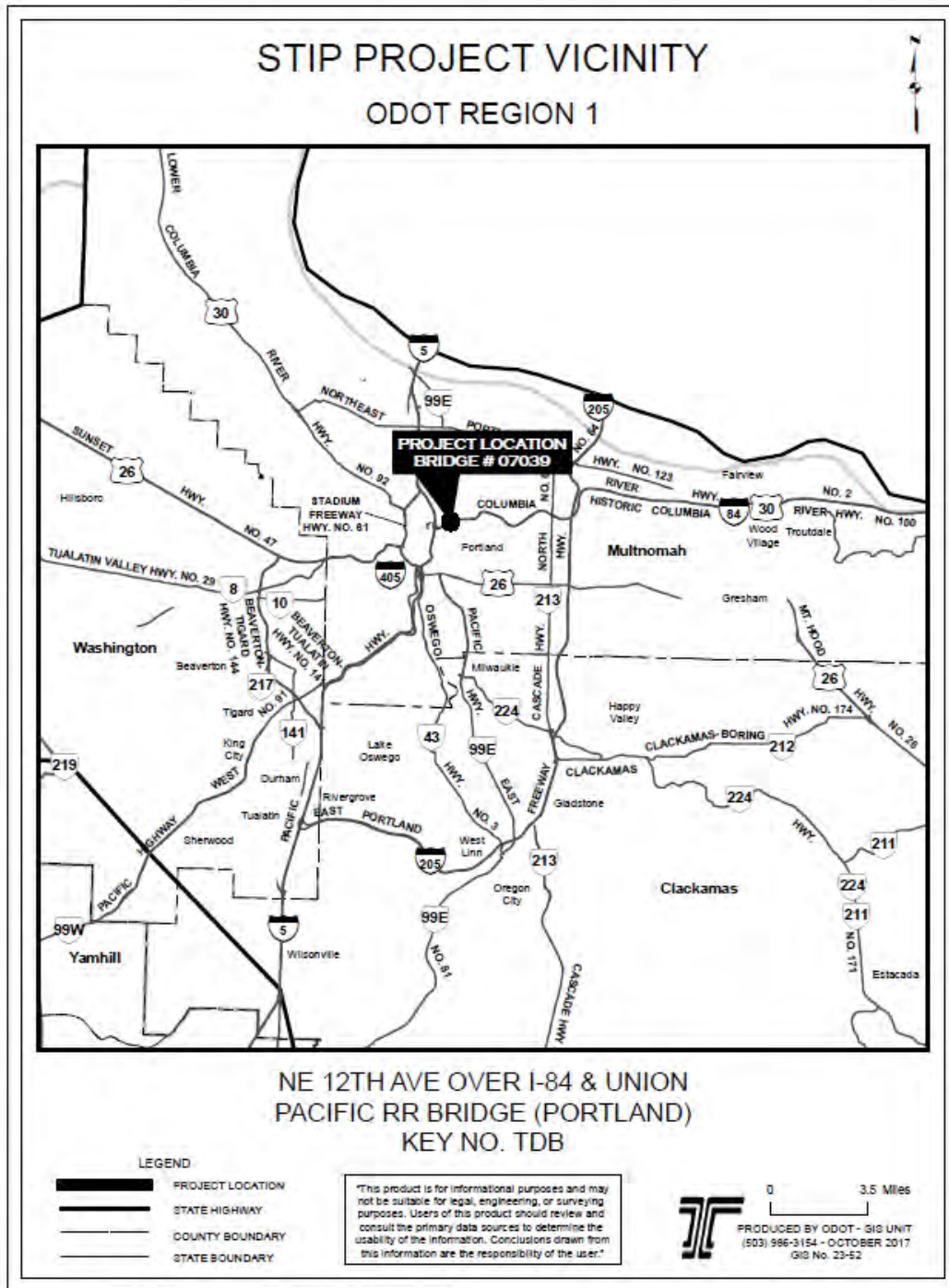
Key 21283

NE 12th Ave Over I-84 & Union Pacific RR Bridge (Portland)

Attachment 1



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OTC Letter for Key 21283



Oregon
Kate Brown, Governor

Oregon Transportation Commission
Office of the Director, MS 11
355 Capitol St NE
Salem, OR 97301-3871

DATE: December 4, 2017
TO: Oregon Transportation Commission

[Original signature on file]

From: Matthew L. Garrett
Director

SUBJECT: **Consent 11** – Amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to add one new project, Northeast 12th Avenue over Interstate 84 and Union Pacific Railroad Bridge (Portland)

Requested Action:

Request approval to amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to add one new project, protective fencing for Northeast 12th Avenue over Interstate 84 and Union Pacific Railroad (UPRR) Bridge (Portland), located in Region 1, Multnomah County. The total estimated cost for this project is \$250,000.

Funding for this project will come from the bridge overpass protective screening program. The budget for this program is \$1.5 million per year.

STIP Amendment Funding Sources

Project	Proposed Funding
NE 12 th Ave over Interstate 84 and Union Pacific Railroad Bridge (Portland)	\$250,000
Bridge Overpass Protective Screening FFY2019	\$199,598
TOTAL	\$449,598

Project to be added

NE 12th Ave over Interstate 84 and Union Pacific Railroad Bridge (Portland) (KN TBD)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2019	\$0	\$45,000
Right of Way	N/A	N/A	N/A
Utility Relocation	N/A	N/A	N/A
Construction	2020	\$0	\$205,000
TOTAL		\$0	\$250,000

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Background:

Oregon Revised Statute [\(ORS\) 366.462](#) requires that all freeway overpasses constructed after November 4, 1993 have fences that are designed to deter persons from throwing objects from the overpasses onto the freeways. This statute also requires that the Oregon Department of Transportation (ODOT) develop a prioritization system to construct fences first on those overpasses that involve the greatest risks, and to construct at least 15 fences per year on existing freeway overpasses.

Currently 12 freeway overpasses in Region 1 do not have fences. The intent is to complete the fences on these remaining freeway overpasses as part of the 2018-2021 STIP.

The Northeast 12th Avenue over Interstate 84 and Union Pacific Railroad Bridge (bridge 07039) is owned by the City of Portland. Constructing the fence on this freeway overpass will improve safety for motorists and move ODOT closer to completion of this program. Since this local agency bridge crosses a freeway, the state will provide the funding to install the fencing. This location was prioritized because this bridge has sidewalks, and is located within one block of Benson High School.

With Commission approval, this screening project can proceed to provide safety to the traveling motorists by designing and installing the protective screening and deter individuals from throwing objects onto the freeway. Without approval, this location will continue to provide opportunities for individuals to continue to throw objects onto the freeway.

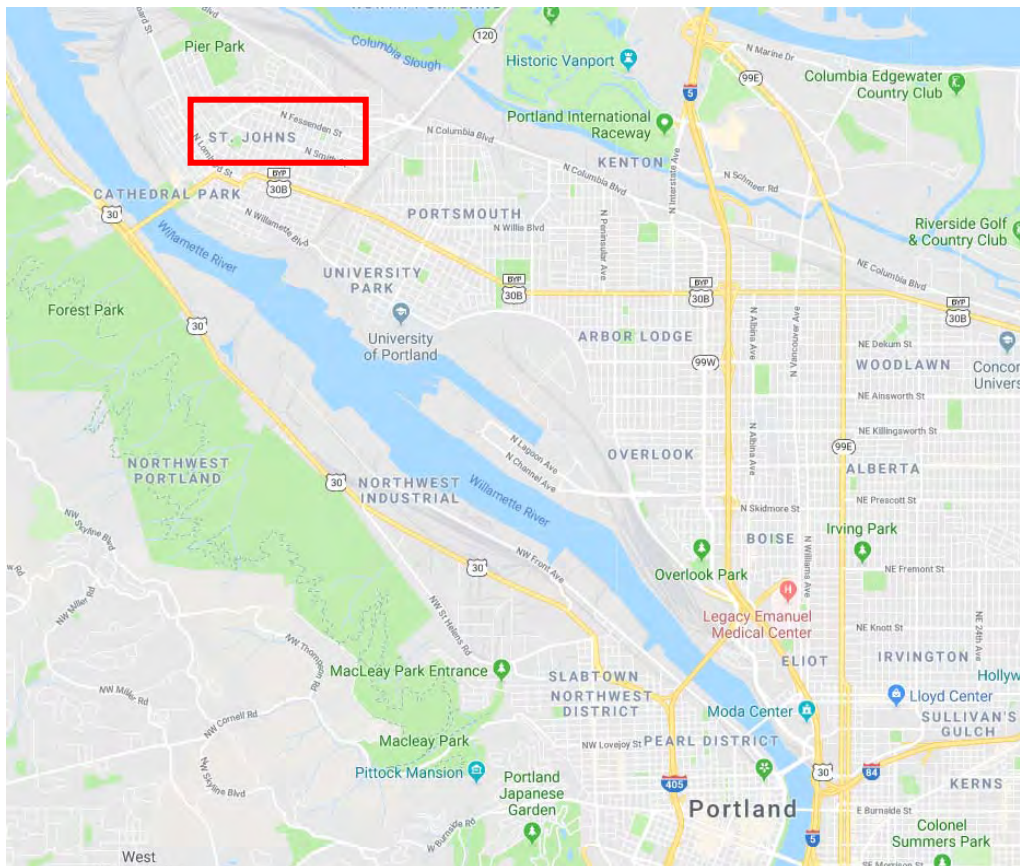
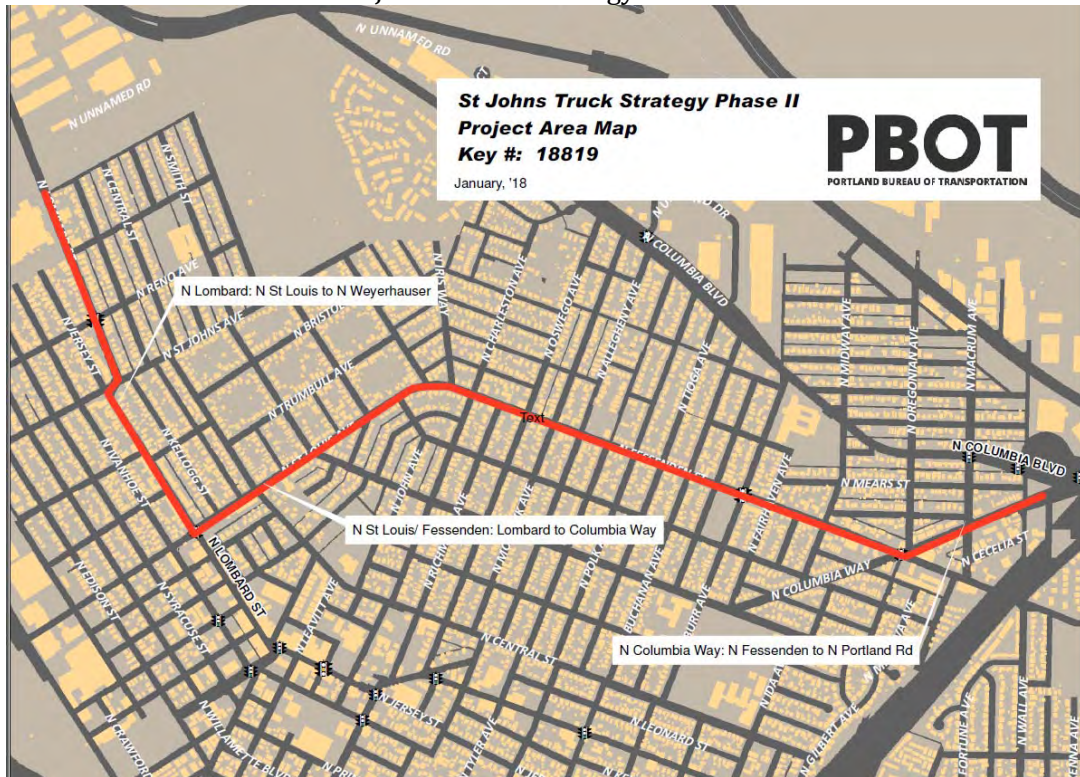
Attachments:

- Attachment 1 - Location and Vicinity Maps

Copies (w/attachment) to:

Jerri Bohard	Travis Brouwer	Tom Fuller	Bob Gebhardt
Paul Mather	McGregor Lynde	Rian Windsheimer	Vaughan Rademeyer
Arlene Santana	Amanda Sandvig	Jeff Flowers	Lynn Averbeck
Rachelle Nelson			

Key 18819 St Johns Truck Strategy Phase II





Oregon
Kate Brown, Governor

Oregon Transportation Commission
Office of the Director, MS 11
355 Capitol St NE
Salem, OR 97301-3871

DATE: March 5, 2018
TO: Oregon Transportation Commission

[Original signature on file]

From: Matthew L. Garrett
Director

SUBJECT: **Consent 12** – Amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to refine the project scope and increase funding for right-of-way and construction phases on the St. Johns Truck Strategy Phase II project.

Requested Action:

Request approval to amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to refine the project scope and increase funding for right-of-way and construction phases on the St. Johns Truck Strategy Phase II project. The City of Portland is providing additional funding to increase the right-of-way phase to \$138,045 and the construction phase to \$3,563,300 to address funding shortfalls from scope refinement.

With this amendment, the total funds from the City of Portland will be \$1,173,102 and the new total estimated cost of the project will be \$4,519,092.

Project to be increased

ST JOHNS TRUCK STRATEGY PHASE II (KN:18819)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	N/A	\$0	\$0
Preliminary Engineering	2016	\$817,747	\$817,747
Right of Way	2018	\$87,300	\$138,045
Utility Relocation	N/A	\$0	\$0
Construction	2018	\$2,440,943	\$3,563,300
Other	N/A	\$0	\$0
TOTAL		\$3,345,990	\$4,519,092

Background:

The St. Johns Truck Strategy, adopted by City of Portland Council in 2001, identified several safety and operational improvement projects within the St. Johns neighborhood. The collective intent of these projects is to encourage freight moving through the St. Johns neighborhood to use the designated freight route and discourage cut-through traffic. St. Johns Truck Strategy Phase I was built in 2012.

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March 5, 2018
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In 2014, project refinement work was completed to define the scope of work for Phase II. The St. Johns Truck Strategy Phase II project will accomplish some of the elements identified in the original St. Johns Truck Strategy. The main elements of Phase II include safety improvements along the North Lombard freight route, traffic calming (discouraging fast moving, excessive, and non-local traffic) along the North St. Louis/Fessenden corridor and changes to the North Portland Road/ Columbia Boulevard intersection to discourage cut-through freight.

The Region 1 Enhance program provided funding for design and construction of Phase II as part of the 2015-2018 STIP selection process. ODOT's intergovernmental agreement with the City of Portland requires that any additional funds needed to complete the project must be provided by the City of Portland. The City of Portland has agreed to pay the shortfalls in funding for the project as per the intergovernmental agreement. A STIP amendment is required to add the local funding to the project and show the updated total project cost for each phase of the project.

The original scope of this project included:

- Median refuge islands curb extensions
- Pedestrian hybrid beacons, enhanced pedestrian signals, speed-reader boards and striping
- Sidewalk infill
- Intersection re-alignment at North St. Johns Avenue/North Lombard intersection and realignment at North Portland Road/Columbia Boulevard.

The City of Portland is now proposing to refine the scope and add funds to include the following:

- Add curb ramp replacements to meet American Disabilities Act (ADA) regulation.
- Add storm water management facilities to project as to meet federal and city requirements.
- Remove the intersection re-alignment of the North Portland Road/Columbia Boulevard. The remaining elements are sufficient to achieve the full intent of the project.
- Increase the total right-of-way budget to \$138,045 to accommodate for design modifications that now require additional temporary construction easements.
- Increase the estimated construction budget to \$3,563,300 to address new Portland Bureau of Transportation (PBOT) pavement restoration standards.

Options

With approval, the project will move forward with reduced elements, the intent of the project is still met, and the design will be completed and constructed.

Without approval, the additional elements in the project will need to be cut in order to fit within the existing budget. This will reduce the elements needed to meet the intent of the project, and may fall short of meeting the overall project goals for reducing the freight traffic and non-local traffic on local streets in the St. Johns area, further reducing the potential improved safety on local streets.

Attachments:

- Attachment 1 – Location and Vicinity Maps

Key 20414

\$775k shifted from Key 20414 to 21071

From the May 5, 2017 OTC agenda Item that allowed Key 21071 to be added into the MTIP and STIP



Oregon
Kate Brown, Governor

Oregon Transportation Commission
Office of the Director, MS 11
355 Capitol St NE
Salem, OR 97301-3871

DATE: May 5, 2017
TO: Oregon Transportation Commission

[Original signature on file]

FROM: Matthew L. Garrett
Director

SUBJECT: Consent 11 – Amend the 2015-2018 Statewide Transportation Improvement Program (STIP) to add Oregon 99 West: Southwest Naito Parkway to Southwest Huber Street – Phase 2 project.

Requested Action:

Request approval to amend the 2015-2018 Statewide Transportation Improvement Program (STIP) to add the Oregon 99 West: Southwest Naito Parkway to Southwest Huber Street – Phase 2 project which supports the Barbur Road Safety Audit (Barbur RSA) implementation. The project is located on Barbur Boulevard (Oregon 99 West) between Southwest Huber Street and Southwest Naito Parkway in Multnomah County. The total cost for the project is approximately \$775,000 and will be funded by the Oregon Department of Transportation (ODOT) Region 1 All Roads Transportation Safety (ARTS) Program via the Road Safety Audit Implementation project in the 2018-2021 Draft STIP.

STIP Amendment Funding Summary

Project	Current Funding	Proposed Funding
Road Safety Audit Implementation	\$3,034,244	\$2,259,244
Oregon 99 West: Southwest Naito Parkway to Southwest Huber Street – Phase 2	\$0	\$775,000
TOTAL	\$3,034,244	\$3,034,244

Projects to add:

Oregon 99 West: Southwest Naito Parkway to Southwest Huber Street – Phase 2 (KN TBD)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2017	\$0	\$162,000
Right of Way	2018	\$0	\$50,000
Utility Relocation	2018	\$0	\$20,000
Construction	2018	\$0	\$543,000
Other	N/A	\$0	\$0
TOTAL		\$0	\$775,000

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5/9/2017

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Projects to reduce funding:

Road Safety Audit Implementation (KN 20414)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	N/A	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
Other	2019	\$3,034,244	\$2,259,244
TOTAL		\$3,034,244	\$2,259,244

Background:

The Oregon Department of Transportation (ODOT) conducted a Road Safety Audit (RSA) in July 2015 on Oregon 99 West (Barbur Boulevard) to identify system-wide and location-specific safety issues including short, intermediate, and long term recommendations for improving safety on Oregon 99 West between Southwest Naito Parkway to Southwest Huber Street in the City of Portland. ODOT has since committed to using the recommendations from the RSA to select and fund projects that support goals for short and intermediate term improvements that will improve safety on the corridor.

The Barbur RSA report identified inconsistent signage as one of the key safety issues of Southwest Barbur corridor between Naito Parkway and Capitol Highway and suggested overhead signing to increase sign visibility and improve way finding. ODOT evaluated and prioritized recommendations provided by the Barbur RSA team and identified two overhead signs for priority implementation to improve safety in the corridor:

Northbound Oregon 99 West :

- MP 2.01 – south of Southwest Barbur at Southwest Naito Parkway Split, and
- MP 2.2 – north of Southwest Bancroft Street.

If the signs are not constructed at these locations, it is possible that ODOT will not fulfill all the safety improvement recommendations in the Barbur Road Safety Audit which could result in more crashes on the corridor.

The total cost for the project is approximately \$775,000 and will come from funds set aside in the 2018-2021 Draft STIP from the All Roads Transportation Safety (ARTS) Program to implement the RSA findings.

Attachments:

- Attachment 1 – Location and Vicinity Maps
- Attachment 2 – Project Schedule

Agenda Item No. 4.5

Resolution No. 18-4883, 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 Metro, ODOT, and TriMet (AP18-08-APR)

Consent Agenda

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING OR AMENDING) RESOLUTION NO. 18-4883
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, CORRECTIONS, OR)
CANCELLATIONS IMPACTING METRO, ODOT,)
AND TRIMET (AP18-08-APR))

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, Metro is receiving a supplemental \$590,720 funding allocation of federal Surface Transportation Block Grant funds from ODOT via formula allocation from ODOT’s federal fiscal Year 2018-20 Transportation Options program in support of Metro’s Regional Transportation Options (RTO) program which is the region’s transportation demand management program to manage congestion and reduce air pollution through the reduction of single-occupant vehicle travel; and

WHEREAS, ODOT has completed the revised the scope for the US30 Sandy River (Troutdale) Bridge project consisting of sidewalk replacement and foundation repairs resulting in a decrease of funding needed for Preliminary Engineering and now is committing construction phase funding of \$1,465,000 planned for 2019 for a total project cost of \$1,735,000; and

WHEREAS, TriMet, in support of JPACT’s decision to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment, is committing \$10 million of local funds for project development work to three ODOT projects including \$2.5 million for Preliminary Engineering (PE) work for the OR217 – SW 72nd Ave to OR10 (SW Scholl’s Ferry Rd) project, \$5 million for PE activities for the I-5 Rose Quarter Improvement project, plus \$2.5 million supporting pre-NEPA project development Planning phase activities for the I-205 - Stafford Rd to OR99E project; and

WHEREAS, TriMet has received a revised 5309 grant allocation in 2019 for the Portland to Milwaukie Light Rail project based on the Federal Transit Agency’s Annual Report on Funding Recommendations Capital Investment Grant program for FY 2019 increasing the FY 2019 allocation from \$38 million to \$65.6 million along with required match raises the total FY 2019 commitment to the Portland to Milwaukie Light Rail project to \$117,515,849; 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 February 2018 Formal MTIP Amendment; and

WHEREAS, all projects included in the April 2018 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 April 6, 2018 and approved the amendment recommendation to JPACT; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on April 19, 2018 to formally amend the 2018-21 MTIP to include the April 2018 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 18-4883



Proposed April 2018 Formal Amendment Bundle			
Amendment Type: FORMAL, AP18-08-APR			
Total Number of Projects: 6			
ODOT Key	Lead Agency	Project Name	Required Changes
Project #1 21312 New	Metro	Metro Transportation Options (FFY 18-20)	Add New Project: The amendment adds approved funding for Metro's Regional Transportation Options Program for the federal fiscal Year period of 2018-2020). Funding is in addition to identified funding in project ID 19292
Project #2 20703 New	ODOT	US30: Sandy River (Troutdale) Bridge	<p>Add New Project: The construction phase is added to the project which adds the project to the active 2018-21 MTIP.</p> <p>The project is an HB2017 awarded project with a total of \$6,315,000 allocation of HB2017 funding. The scope of work includes sidewalk replacement, foundation repair, and bridge painting. Subsequent to the HB2017 award, a bridge inspection revealed that it did not require painting. Consequently, a savings of \$4,580,000 was realized and transferred to another Bridge program project.</p> <p>The revised total project cost estimate to complete the revised scoped project consisting of sidewalk replacement and foundation repair totals \$1,735,000.</p>

<p>Project #3 21179</p>	<p>ODOT</p>	<p>OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)</p>	<p>Add Funding: \$2.5 million is being added to the PE phase.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>
<p>Project #4 19071</p>	<p>ODOT</p>	<p>I-5 Rose Quarter Improvement Project</p>	<p>Add Funding: \$5 million is being added to the PE phase.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>

<p>Project #5 19786</p>	<p>ODOT</p>	<p>I-205: Stafford Rd - OR99E</p>	<p>Add Funding: This amendment adds 2.5 million of local funds contributed from TriMet to support the pre-NEPA project development Planning phase per the approved ODOT-TriMet Intergovernmental Agreement Funding Contribution Agreement: I-205, OR217, and Rose Quarter Improvement project.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>
<p>Project #6 20843</p>	<p>TriMet</p>	<p>Portland to Milwaukie Light Rail (2019)</p>	<p>Add Funding: This amendment increases the authorized Section 5309 Capital Investment Grant (CIG) allocation to the Portland to Milwaukie Light Rail in 2019. The increase is based on the FTA CIG recommendations for Federal Fiscal Year 2019.</p>

Exhibit A to Resolution 18-4883

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #1 EXISTING MTIP PROGRAMMING - None New Project

PROJECT #1 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
21312	TBD	Metro	Metro Transportation Options (FFY 18-20)	Other	\$ 622,695

Project Description:

Amended MTIP Fund Programming by Phase

Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (RTO Implement)	Total
State STBG FLX	Z240	Federal	2018					\$ 590,720	\$ 590,720
Local	Match	Local	2018					\$ 31,975	\$ 31,975
									\$ -
Total:				\$ -	\$ -	\$ -	\$ -	\$ 622,695	\$ 622,695

Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
	2. State STBG FLX = Fedeal Surface Transportation Program Block Grant funds allocated to ODOT
	3. Local = General local agency funds used to provide the minimum match requirement to the federal funds.

Amendment Summary

The formal amendment creates a new project with supplemental funding from ODOT in support of Metro's Regional Travel Options (RTO) FY 2018 program in Key 19292. The RTO program implements strategies to help diversify trip choices, reduce pollution and improve mobility. RTO includes all of the alternatives to driving alone, such as carpooling, vanpooling, riding transit, bicycling, walking and telecommuting. Source funding split off from ODOT project grouping buckets 20582, 20583, & 20584)

Exhibit A to Resolution 18-4883

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #2 EXISTING MTIP PROGRAMMING (from the 2015 MTIP)										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20703	71007	ODOT	US30: Sandy River (Troutdale) Bridge					Highway	\$ 565,001	
Project Description:			Design shelf ready plans to paint bridge; replace sidewalk, and repair foundation.							
Existing MTIP Project Fund Programming by Phase										
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
NHPP-FAST	Z001	Federal	2017		\$ 506,975				\$ 506,975	
State	Match	State	2017		\$ 58,026				\$ 58,026	
Total:				\$ -	\$ 565,001	\$ -	\$ -	\$ -	\$ 565,001	

PROJECT #2 PROPOSED AMENDED CHANGES										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20703	71007	ODOT	US30: Sandy River (Troutdale) Bridge					Highway	\$ 1,735,000	
Project Description:			Design shelf ready plans to paint bridge, replace sidewalk, and repair foundation. Replace sidewalk and repair foundation							
Amended MTIP Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
STBG 5-200K FASTG	Z231	Federal	2017		\$ 242,271				\$ 242,271	
State	Match	State	2017		\$ 27,729				\$ 27,729	
ADVCON	ACPO	Federal	2019				\$ 1,314,545		\$ 1,314,545	
State	Match	State	2019				\$ 150,455		\$ 150,455	
Total:				\$ -	\$ 270,000	\$ -	\$ 1,465,000	\$ -	\$ 1,735,000	
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 MTIP. They are shown above in their programming years in the shaded fields. The funding is still committed to the project, but is now obligated in a prior year outside of the current 2018 MTIP. The funding in that year is referred to as "prior obligated".</p> <p>3. NHPP-FAST = Federal National Highway Performance Program funds allocated from the FAST Act</p> <p>4. STBG 5-200K FASTG = Federal Surface Transportation Block Grant funds allocated to areas with populations between 5,000-200,000 from the FAST Act</p>									

	5. ADVCON = Federal Advance Construction fund type code. Used as a federal place holder until the specific federal fund type code is determined and committed to the project.
	6. State = General state funds generally used as the required local match requirement against the federal funds.

Amendment Summary

The project was awarded a total of \$6,315,000 of HB2017 funding. The PE phase for this project was added to the 2015 MTIP back last July allowing the PE phase to obligate the federal funds before the end of FFY 2017. STBG funds were obligated in place of the NHPP funds on July 6, 2017. Subsequent to that action, a review of the bridge determined it did not require painting. The revised primary scope element now consisted of actions to replace the sidewalk and repair the bridge foundation. The change in scope of eliminating the painting component reduced the total project cost to \$1,735,000. The PE phase was reduced to \$270K and the Construction phase estimated at \$1,465,000 for a total project cost estimate now of \$1,735,0000.

Exhibit A to Resolution 18-4883

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #3 EXISTING MTIP PROGRAMMING (from the 2015 MTIP)									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
21179	71034	ODOT	OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)					Highway	\$ 9,400,000
Project Description:			On OR217 from about 72nd Ave to SW Scholl's Ferry Road (OR210) construct New NB auxiliary lane segments (HB2017 awarded Project, \$54,000,000 original award)						
Existing MTIP Project Fund Programming by Phase									
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total
ADVCON	ACPO	Federal	2018		\$ 8,434,620				\$ 8,434,620
State	Match	State	2018		\$ 965,380				\$ 965,380
Total:				\$ -	\$ 9,400,000	\$ -	\$ -	\$ -	\$ 9,400,000

PROJECT #3 PROPOSED AMENDED CHANGES									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
21179	71034	ODOT	OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)					Highway	\$ 11,900,000
Project Description:			On OR217 from about 72nd Ave to SW Scholl's Ferry Road (OR210) construct New NB auxiliary lane segments (HB2017 awarded Project, \$54,000,000 original award)						
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total
ADVCON	ACPO	Federal	2018		\$ 8,434,620				\$ 8,434,620
State	Match	State	2018		\$ 965,380				\$ 965,380
TriMet GF	Overmatch	Local	2018		\$ 2,500,000				\$ 2,500,000
Total:				\$ -	\$ 11,900,000	\$ -	\$ -	\$ -	\$ 11,900,000

- Notes:
1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment.
 2. ADVCON = Federal Advance Construction fund type code. Used as a federal place holder until the specific federal fund type code is determined and committed to the project.
 3. State = General state funds generally used as the required local match requirement against the federal funds.
 4. TriMet GF = Local other funds (specifically TriMet general funds) committed to the project

Amendment Summary
 By agreement between ODOT and TriMet, TriMet is providing \$2,500,000 of their local funds in support of the OR217 NB Aux Lane project

Exhibit A to Resolution 18-4883

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
 Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #4 EXISTING MTIP PROGRAMMING (from the 2015 MTIP)									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
19071	70784	ODOT	I-5 Rose Quarter Improvement Project					Highway	\$ 20,391,997
Project Description:			Planning and project development efforts of the Broadway-Weidler facility plan and the N/NE Quadrant , which identified transportation investments that would result in improved safety and operations as well as supporting economic growth. Proposed multi-modal improvements include: ramp-to-ramp (auxiliary) lanes, highway shoulders, highway covers, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. (HB2017 Named & Conditioned project to add \$16,265,452 of NHFP funds)						
Existing MTIP Project Fund Programming by Phase									
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total
NHPP-Exempt	M002	Federal	2016		\$ 1,474,354				\$ 1,474,354
State	Match	State	2016		\$ 124,382				\$ 124,382
NHPP-Exempt	MOE2	Federal	2016		\$ 2,331,145				\$ 2,331,145
State	Match	State	2016		\$ 196,664				\$ 196,664
NHFP	Z460	Federal	2018		\$ 15,000,000				\$ 15,000,000
State	Match	State	2018		\$ 1,265,452				\$ 1,265,452
Total:				\$ -	\$ 20,391,997	\$ -	\$ -	\$ -	\$ 20,391,997
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 MTIP. They are shown above in their programming years in the shaded fields. The funding is still committed to the project, but is now obligated in a prior year outside of the current 2018 MTIP. The funding in that year is referred to as "prior obligated". 3. NHPP-Exempt = Federal National Highway Performance Program funding 4. State = General state funds normally committed as the required matching funds to the federal funds 5. NHFP = Federal National Highway Freight Program funds allocated to Oregon (ODOT) annual through a formula methodology								

Amendment Summary
 Project changes are shown on the next page

PROJECT #4 PROPOSED AMENDED CHANGES

ODOT Key	MTIP ID	Lead Agency	Project Name	Project Type	Project Cost
19071	70784	ODOT	I-5 Rose Quarter Improvement Project	Highway	\$ 25,391,997
Project Description:			Planning and project development efforts of the Broadway-Weidler facility plan and the N/NE Quadrant , which identified transportation investments that would result in improved safety and operations as well as supporting economic growth. Proposed multi-modal improvements include: ramp-to-ramp (auxiliary) lanes, highway shoulders, highway covers, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. (HB2017 Named & Conditioned project to add \$16,265,452 of NHFP funds)		

Amended MTIP Fund Programming by Phase

Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
NHPP-Exempt	M002	Federal	2016		\$ 1,474,354				\$ 1,474,354
State	Match	State	2016		\$ 124,382				\$ 124,382
NHPP-Exempt	MOE2	Federal	2016		\$ 2,331,145				\$ 2,331,145
State	Match	State	2016		\$ 196,664				\$ 196,664
NHFP	Z460	Federal	2018		\$ 15,000,000				\$ 15,000,000
State	Match	State	2018		\$ 1,265,452				\$ 1,265,452
Other TriMet GF	OTH0	Local	2018		\$ 5,000,000				\$ 5,000,000
Total:				\$ -	\$ 25,391,997	\$ -	\$ -	\$ -	\$ 25,391,997

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-Exempt = Federal National Highway Performance Program funding
	3. State = General state funds normally committed as the required matching funds to the federal funds
	4. NHFP = Federal National Highway Freight Program funds allocated to Oregon (ODOT) annual through a formula methodology

Amendment Summary

This amendment adds \$5 million of local funds contributed from TriMet to support the PE phase per the approved ODOT-TriMet Intergovernmental Agreement Funding Contribution Agreement: I-205, OR217, and Rose Quarter

Exhibit A to Resolution 18-4883

**2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects**



PROJECT #5 EXISTING MTIP PROGRAMMING (from the 2015 MTIP)									
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost
19786	70859	ODOT	I-205: Stafford Rd - OR99E					Highway	\$ 12,500,000
Project Description:			Complete pre-NEPA project development planning activities to add a 3rd through-lane on I-205 in each direction and a 4th lane on the Abernethy Bridge to separate through traffic and complete required seismic upgrades.						
Existing MTIP Project Fund Programming by Phase									
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Wav	Construction	Other	Total
NHFP	Z460	Federal	2016	\$ 2,305,500					\$ 2,305,500
State	Match	State	2016	\$ 194,500					\$ 194,500
NHFP	Z460	Federal	2018	\$ 9,222,000					\$ 9,222,000
State	Match	State	2018	\$ 778,000					\$ 778,000
Total:				\$ 12,500,000	\$ -	\$ -	\$ -	\$ -	\$ 12,500,000
Notes:	1. Red Font = Funding reductions made to the project phase. Blue font = Additions made to the project as part of the amendment. 2. Funding programmed in years before 2018 are considered prior obligated and will be shown in the prior obligated total for the project in the MTIP. They are shown above in their programming years in the shaded fields. The funding is still committed to the project, but is now obligated in a prior year outside of the current 2018 MTIP. The funding in that year is referred to as "prior obligated". 3. NHFP 3. State = General state funds normally committed as the required matching funds to the federal funds 4. NHFP = Federal National Highway Freight Program funds allocated to Oregon (ODOT) annual through a formula methodology								

Amendment Summary
Project changes are stated on the next page

PROJECT #5 PROPOSED AMENDED CHANGES									
ODOT Key	MTIP ID	Lead Agency	Project Name				Project Type	Project Cost	
19786	70859	Federal	I-205: Stafford Rd - OR99E				Highway	\$ 15,000,000	
Project Description:		Complete pre-NEPA project development planning activities to add a 3rd through-lane on I-205 in each direction and a 4th lane on the Abernethy Bridge to separate through traffic and complete required seismic upgrades.							
Amended MTIP Fund Programming by Phase									
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
NHFP	Z460	Federal	2016	\$ 2,305,500					\$ 2,305,500
State	Match	State	2016	\$ 194,500					\$ 194,500
NHFP	Z460	Federal	2018	\$ 9,222,000					\$ 9,222,000
State	Match	State	2018	\$ 778,000					\$ 778,000
Local (TriMet GF)	Overmatch	Local	2018	\$ 2,500,000					\$ 2,500,000
Total:				\$ 15,000,000	\$ -	\$ -	\$ -	\$ -	\$ 15,000,000
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-Exempt = Federal National Highway Performance Program funding 3. State = General state funds normally committed as the required matching funds to the federal funds 4. NHFP = Federal National Highway Freight Program funds allocated to Oregon (ODOT) annual through a formula methodology								

Amendment Summary

This amendment adds 2.5 million of local funds contributed from TriMet to support the pre-NEPA project development Planning phase per the approved ODOT-TriMet Intergovernmental Agreement Funding Contribution Agreement: I-205, OR217, and Rose Quarter

Exhibit A to Resolution 18-4883

2018-2021 Metropolitan Transportation Improvement Program Chapter 5 Tables Amendment
Action: Amend the MTIP to increase or adjust required funding and scope, or add new projects



PROJECT #6 EXISTING MTIP PROGRAMMING										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20843	70929	TriMet	Portland to Milwaukie Light Rail (2019)					Transit	\$ 68,006,708	
Project Description:		This project extends light rail from PSU in downtown Portland to Milwaukie and north Clackamas County. It includes a multi-modal bridge carrying light rail, streetcar, buses, bicycles and pedestrians.								
Existing MTIP Project Fund Programming by Phase										
Fund Type Code	Fund Code	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total	
5309	FF30	Federal	2019					\$ 38,000,000	\$ 38,000,000	
Local	Match	Local	2019					\$ 25,333,333	\$ 25,333,333	
Other	Overmatch	Local	2019					\$ 4,673,375	\$ 4,673,375	
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 68,006,708	\$ 68,006,708	

PROJECT #6 PROPOSED AMENDED CHANGES										
ODOT Key	MTIP ID	Lead Agency	Project Name					Project Type	Project Cost	
20843	70929	TriMet	Portland to Milwaukie Light Rail (2019)					Transit	\$ 117,515,849	
Project Description:		This project extends light rail from PSU in downtown Portland to Milwaukie and north Clackamas County. It includes a multi-modal bridge carrying light rail, streetcar, buses, bicycles and pedestrians.								
Amended MTIP Fund Programming by Phase										
Fund Code	Note	Type	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total	
5309	FF30	Federal	2019					\$ 65,664,144	\$ 65,664,144	
Local	Match	Local	2019					\$ 51,851,705	\$ 51,851,705	
Total:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 117,515,849	\$ 117,515,849	
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. 5309 = Federal FTA Section 5309 Capital Investment Grants. Awards are nationwide competitive.</p> <p>3. Local = Local agency funds normally used as matching funds to satisfy the federal match requirement and/or to cover remaining project costs.</p> <p>4. Other = Local agency funds used beyond the required match to the federal funds when needed to separate local matching funds and other local funds.</p>									

Amendment Summary

This amendment increases the authorized Section 5309 Capital Investment Grant (CIG) allocation to the Portland to Milwaukie Light Rail in 2019. The increase is based on the CIG recommendations for Federal Fiscal Year 2019

Memo



Date: Friday April 20, 2018
 To: Metro Council and Interested Parties
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: April 2018 MTIP Formal Amendment plus Approval Request of Resolution 18-4883

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 METRO, ODOT AND TRIMET (AP18-08-APR)

BACKGROUND

What this is:

The April 2018 Formal Metropolitan Transportation Improvement Program (MTIP) Amendment bundle contains required changes and updates impacting Metro, ODOT and TriMet. Six projects are included in the amendment bundle. They are summarized in the below table:

Proposed April 2018 Formal Amendment Bundle Amendment Type: FORMAL, AP18-08-APR Total Number of Projects: 6			
ODOT Key	Lead Agency	Project Name	Required Changes
Project #1 21312 New	Metro	Metro Transportation Options (FFY 18-20)	Add New Project: The amendment adds approved funding for Metro's Regional Transportation Options Program for the federal fiscal Year period of 2018-2020). Funding is in addition to identified funding in project ID 19292
Project #2 20703 New	ODOT	US30: Sandy River (Troutdale) Bridge	<p>Add New Project: The construction phase is added to the project which adds the project to the active 2018-21 MTIP.</p> <p>The project is an HB2017 awarded project with a total of \$6,315,000 allocation of HB2017 funding. The scope of work includes sidewalk replacement, foundation repair, and bridge painting. Subsequent to the HB2017 award, a bridge inspection revealed that it did not require painting. Consequently, a savings of \$4,580,000 was realized and transferred to another Bridge program project.</p> <p>The revised total project cost estimate to complete the revised scoped project consisting of sidewalk replacement and foundation repair totals \$1,735,000.</p> <p>Add Funding: \$2.5 million is being added to the PE phase.</p>
Project #3 21179	ODOT	OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)	<p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>

Project #4 19071	ODOT	I-5 Rose Quarter Improvement Project	<p>Add Funding: \$5 million is being added to the PE phase.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>
Project #5 19786	ODOT	I-205: Stafford Rd - OR99E	<p>Add Funding: This amendment adds 2.5 million of local funds contributed from TriMet to support the pre-NEPA project development Planning phase per the approved ODOT-TriMet Intergovernmental Agreement Funding Contribution Agreement: I-205, OR217, and Rose Quarter Improvement project.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet will provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region. This one of three projects receiving a portion of the \$10 million from TriMet.</p>
Project #6 20843	TriMet	Portland to Milwaukie Light Rail (2019)	<p>Add Funding: This amendment increases the authorized Section 5309 Capital Investment Grant (CIG) allocation to the Portland to Milwaukie Light Rail in 2019. The increase is based on the FTA CIG recommendations for Federal Fiscal Year 2019.</p>

What is the requested action?

JPACT is recommending final approval from Metro Council for the April 2018 Formal MTIP amendment as stated in Resolution 18-4883 enabling the six identified projects to be amended correctly into the 2018 MTIP, with final approval to occur from USDOT.

TPAC DISCUSSION

The amendment discussion at TPAC was far more detailed than past formal amendment notifications. TPAC members are demonstrating an increased hunger for the logic and rationale driving the MTIP amendments. TPAC members also provided staff with a request to expand the level of details about the project amendments especially for Exhibit A and the Public Notification tables. Their questions are similar to the questions USDOT asks about the project amendment. Understanding the specific changes to the project is important as a result of the proposed amendment, but also why the change is occurring.

A specific area TPAC members asked for expanded amendment details are in the preview summary tables in the change field in Exhibit A and the Public Notification Tables. This field was used to provide a simple one line tickler about the amendment change. TPAC members asked staff to provide expanded details to help understand the need for the amendment.

TPAC members also requested specific details about the JPACT bonding decision to be included for three affected projects: Keys 21179, 19071, and 19786. As noted in the preview table on the

previous pages, the bond information has been added to the project change field for the three impacted projects.

A final discussion area included the ability of staff to develop and provide TPAC members with a construction phase equity report summary. The purpose of such a report would provide a perspective of projects with construction phases and how they support RTP equity goals. MTIP amendments occur to position phase funding in the correct timing and amount for obligation purposes enabling the lead agency then to expend the funds. When construction phase funding is obligated, the lead agency solicits bids for construction and construction management as required. The selection of the construction contractor and the relationship towards RTP equity goals is at the heart of the TPAC request. Developing such a report appears feasible and there is interest behind it. However, developing a construction equity report will require voluntary effort from local agencies and ODOT to submit the required construction contractor data to Metro. The advantage of developing a construction equity report would help address Metro equity performance measurement requirements.

In a somewhat parallel effort, Metro staff are working on Construction Career Pathways project that is examining equity issues in the hiring and career progression of construction personnel. MTIP/RTP staff will coordinate with the project manager to determine what they have learned and incorporate any recommendations into the TPAC request. Staff will return with a progress report to TPAC at a future date.

The TPAC discussion resulted in a modified approval recommendation of draft resolution 18-4883 and the April 2018 Formal MTIP amendment as follows:

- a. Provide a few necessary corrections to Exhibit A and the Public Notification tables as noted (e.g. Two projects were missing required funding years in the table. Correction have been made).
- b. Expand the amendment change details in Exhibit A and the Public Notification tables to provide additional details about the project amendment.
- c. Expand the project change details for Keys 21179, 19701, and 19786 in this amendment for improve clarity to include remarks about the JPACT vote to bond a subset of the RFFA funds and TriMet's involvement.
- d. Explore the feasibility of and develop a construction phase equity compliance report which TPAC members could review on a periodic basis.

Note: MTIP staff concurs with the above TPAC recommendations. Corrections to the support materials have been made. A detailed summary of the six projects being amended is provided in the below tables:

1. Project: Metro Transportation Options (FFY 18-20)	
Lead Agency:	Metro
ODOT Key Number:	20703 MTIP ID Number: TBD
Project Description:	Supplemental funding from ODOT supporting Key 19292 - FY 2018 Metro RTO program (from ODOT Keys 20582, 20583, & 20584)
What is changing?	Through this formal amendment, the new project is being added to the 2018 MTIP. ODOT is contributing funding towards Metro Regional Transportation Options (RTO) program for FY 2018-2020. Metro's RTO program is the region's transportation demand management program to manage congestion and reduce air pollution through the reduction of single-occupant vehicle travel. RTO supports the work of regional public and private partners who help people become more aware of the various travel options available to them and encourage the use of those options. A variety of strategies are implemented to address trips for all purposes, including commuting, shopping, activities, and more. As the region's population and economy

	grows, the RTO program will gain efficiencies moving people and goods on built-out transportation infrastructure. RTO funding is sourced from RFFA Step 1 allocation and is programmed in Keys 19292 for FY 2018.
Additional Details:	RTO funding is sourced from RFFA Step 1 allocation and is programmed in Keys 19292 for FY 2018. The supplemental STBG funding from ODOT is slit off of three existing project grouping buckets in Keys 20582, 20583, and 20584. The supplemental funding is available to be obligated as of July 2018.
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal amendment.
Total Programmed Amount:	All funds are programmed in the MTIP's Other phase. The ODOT total STBG contribution is \$590,720 with Metro providing \$31,975 of required local matching funds. The total programmed amount is \$622,695
Added Notes:	

2. Project: US30: Sandy River (Troutdale) Bridge	
Lead Agency:	ODOT
ODOT Key Number:	20703 MTIP ID Number: 71007
Project Description:	Replace sidewalk and repair foundation
What is changing?	Through this formal amendment, the new project is being added to the 2018 MTIP.
Additional Details:	<p>The project is an HB2017 awarded project with a total of \$6,315,000 allocation of HB2017 funding. The scope of work includes sidewalk replacement, foundation repair, and bridge painting. Subsequent to the HB2017 award, a bridge inspection revealed that it did not require painting. At the December 2017 OTC meeting, the OTC agreed to change the project scope and removed the painting component to the project. ODOT estimated a savings of \$4,580,000 of which \$1,246,615 was transferred to the I-5 Crowson Rd project (in Jackson County, OR). The remaining savings was returned to the State Bridge Program (and for later re-allocation back to this project as needed).</p> <p>The revised total project cost estimate to complete the revised scoped project consisting of sidewalk replacement and foundation repair totals \$1,735,000. The PE phase is now estimated at \$270,000 with the Construction phase estimated at \$1,465,000. Unexpended obligated funds from the PE phase are being transferred to the Construction phase with the remaining balance coming from the State Bridge Program and HB2017 authorized allocation.</p> <p>The Construction phase is schedule to begin during federal fiscal year 2019.</p> <p>The amendment adds the full project to the 2018 MTIP which includes adjusting the project scope, corrects the PE phase programming, and adds the construction phase.</p>
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal amendment.

Project Name	US30: SANDY RIVER (TROUTDALE) BRIDGE	
	K20703	
PHASE	YEAR	COST
Planning		\$ -
Preliminary Engineering	2017	\$ 565,000
Right of Way		\$ -
Utility Relocation		\$ -
Construction	2019	\$ 5,750,000
Other		\$ -
TOTAL		\$ 6,315,000



Total Programmed Amount:	The PE phase is decreased to a total of \$270,000. The Construction phase programming is \$1,465,000 for a total programmed amount of \$1,735,000
Added Notes:	OTC approval based on the HB2017 award first occurred during their September 2017 meeting. The re-scoping and funding re-programming action occurred during their December 2017 meeting.

3. Project: OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)																
Lead Agency:	ODOT															
ODOT Key Number:	21179															
MTIP ID Number:	71034															
Project Description:	On OR217 from about 72nd Ave to SW Scholl's Ferry Road (OR210) construct New NB auxiliary lane segments (HB2017 awarded Project, \$54,000,000 original award)															
What is changing?	<p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet desires to provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region.</p> <p>ODOT has begun development of the following three projects:</p> <ol style="list-style-type: none"> 1. Construction of a northbound auxiliary lane along OR217 between SW 72nd Avenue and SW Scholl's Ferry Rd (the "NB OR217 Project") 2. Widening of I-205 between Abernethy Bridge and Stafford Road (the "I-205 Project") 3. Construction of an auxiliary lane and shoulders on I-5 near the Broadway/Weidler interchange, and replacing existing overpasses with a land bridge (the "Rose Quarter Project"). <p>As a result of the agreement between ODOT and TriMet:</p> <ul style="list-style-type: none"> • \$2,500,000 will be added to the planning phase of the Interstate 205: Stafford Road to Oregon Highway 99 East project (ODOT Project Key 19786) • \$2,500,000 will be added to the preliminary engineering phase of the Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road) project (ODOT Project Key 21179). • \$5,000,000 will be added to the preliminary engineering phase of the Interstate 5 Rose Quarter Improvement Project (ODOT Project Key 19071). <p>STIP amendment funding summary</p> <table border="1"> <thead> <tr> <th>Project</th> <th>Current Funding</th> <th>Proposed Funding</th> </tr> </thead> <tbody> <tr> <td>Interstate 205: Stafford Road to Oregon 99 East</td> <td>\$12,500,000</td> <td>\$15,000,000</td> </tr> <tr> <td>Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road) (not including HB 2017 funding)</td> <td>\$9,400,000</td> <td>\$11,900,000</td> </tr> <tr> <td>Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)</td> <td>\$20,391,997</td> <td>\$25,391,997</td> </tr> <tr> <td>TOTAL</td> <td>\$42,291,997</td> <td>\$52,291,997</td> </tr> </tbody> </table>	Project	Current Funding	Proposed Funding	Interstate 205: Stafford Road to Oregon 99 East	\$12,500,000	\$15,000,000	Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road) (not including HB 2017 funding)	\$9,400,000	\$11,900,000	Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)	\$20,391,997	\$25,391,997	TOTAL	\$42,291,997	\$52,291,997
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TOTAL	\$42,291,997	\$52,291,997														
Additional Details:	The IGA is the "Funding Contribution Agreement: I-205, OR217, and Rose Quarter" and was approved on February 6, 2018.															
Why a Formal amendment is required?	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized requires a formal amendment.															

Total Programmed Amount:	All current funding programmed in Key 21179 is in the PE phase. As a result of the funding addition, the PE phase to Key 21179 will increase from \$9,400,000 to \$11,900,000
Added Notes:	OTC approval was required and occurred during their March 2018 meeting

4. Project: I-5 Rose Quarter Improvement Project																
Lead Agency:	ODOT															
ODOT Key Number:	19071 MTIP ID Number: 19071															
Project Description:	<p>Planning and project development efforts of the Broadway-Weidler facility plan and the N/NE Quadrant, which identified transportation investments that would result in improved safety and operations as well as supporting economic growth. Proposed multi-modal improvements include: ramp-to-ramp (auxiliary) lanes, highway shoulders, highway covers, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. (HB2017 Named & Conditioned project to add \$16,265,452 of NHFP funds)</p>															
What is changing?	<p>The amendment adds \$5 million of local TriMet funds to support the PE phase</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet desires to provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region.</p> <p>ODOT has begun development of the following three projects:</p> <ol style="list-style-type: none"> 4. Construction of a northbound auxiliary lane along OR217 between SW 72nd Avenue and SW Scholl’s Ferry Rd (the “NB OR217 Project”) 5. Widening of I-205 between Abernethy Bridge and Stafford Road (the “I-205 Project”) 6. Construction of an auxiliary lane and shoulders on I-5 near the Broadway/Weidler interchange, and replacing existing overpasses with a land bridge (the “Rose Quarter Project”). <p>As a result of the agreement between ODOT and TriMet:</p> <ul style="list-style-type: none"> • \$2,500,000 will be added to the planning phase of the Interstate 205: Stafford Road to Oregon Highway 99 East project (ODOT Project Key 19786) • \$2,500,000 will be added to the preliminary engineering phase of the Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) project (ODOT Project Key 21179). • \$5,000,000 will be added to the preliminary engineering phase of the Interstate 5 Rose Quarter Improvement Project (ODOT Project Key 19071). <p>STIP amendment funding summary</p> <table border="1"> <thead> <tr> <th>Project</th> <th>Current Funding</th> <th>Proposed Funding</th> </tr> </thead> <tbody> <tr> <td>Interstate 205: Stafford Road to Oregon 99 East</td> <td>\$12,500,000</td> <td>\$15,000,000</td> </tr> <tr> <td>Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) (not including HB 2017 funding)</td> <td>\$9,400,000</td> <td>\$11,900,000</td> </tr> <tr> <td>Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)</td> <td>\$20,391,997</td> <td>\$25,391,997</td> </tr> <tr> <td>TOTAL</td> <td>\$42,291,997</td> <td>\$52,291,997</td> </tr> </tbody> </table>	Project	Current Funding	Proposed Funding	Interstate 205: Stafford Road to Oregon 99 East	\$12,500,000	\$15,000,000	Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) (not including HB 2017 funding)	\$9,400,000	\$11,900,000	Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)	\$20,391,997	\$25,391,997	TOTAL	\$42,291,997	\$52,291,997
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TOTAL	\$42,291,997	\$52,291,997														

Additional Details:	The IGA is the “Funding Contribution Agreement: I-205, OR217, and Rose Quarter” and was approved on February 6, 2018.
Why a Formal amendment is required?	Cost increases at or greater than 20% for \$1 million or higher programmed projects require a formal amendment per the Amendment Matrix. The additional \$5 million equals a 24.5% increase to the project
Total Programmed Amount:	The programming for the project (all in the PE phase) increase from \$20,391,997 to \$25,391,997
Added Notes:	Approval from the Oregon Transportation Commission (OTC) was required for this project. OTC approval occurred during their March 2017 meeting.

5. Project: I-205: Stafford Rd to Oregon 99 East																
Lead Agency:	ODOT															
ODOT Key Number:	19786															
MTIP ID Number:	70859															
Project Description:	Complete pre-NEPA project development planning activities to add a 3rd through-lane on I-205 in each direction and a 4th lane on the Abernethy Bridge to separate through traffic and complete required seismic upgrades.															
What is changing?	<p>\$2.5 million of local funds from TriMet are being added to support the project’s the pre-NEPA project development planning phase.</p> <p>In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to develop high capacity transit, highway bottleneck, and active transportation projects in preparation for potential state and regional investment. Metro has agreed to provide these funds to TriMet, and TriMet will then sell the bonds.</p> <p>TriMet desires to provide \$10,000,000 to State upon the completion of the bond sale to assist in developing the projects set forth in this Agreement as part of a multiagency approach to address multiple transportation, safety, and freight issues in the region.</p> <p>ODOT has begun development of the following three projects:</p> <ol style="list-style-type: none"> 7. Construction of a northbound auxiliary lane along OR217 between SW 72nd Avenue and SW Scholl’s Ferry Rd (the “NB OR217 Project”) 8. Widening of I-205 between Abernethy Bridge and Stafford Road (the “I-205 Project”) 9. Construction of an auxiliary lane and shoulders on I-5 near the Broadway/Weidler interchange, and replacing existing overpasses with a land bridge (the “Rose Quarter Project”). <p>As a result of the agreement between ODOT and TriMet:</p> <ul style="list-style-type: none"> • \$2,500,000 will be added to the planning phase of the Interstate 205: Stafford Road to Oregon Highway 99 East project (ODOT Project Key 19786) • \$2,500,000 will be added to the preliminary engineering phase of the Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) project (ODOT Project Key 21179). • \$5,000,000 will be added to the preliminary engineering phase of the Interstate 5 Rose Quarter Improvement Project (ODOT Project Key 19071). <p>STIP amendment funding summary</p> <table border="1"> <thead> <tr> <th>Project</th> <th>Current Funding</th> <th>Proposed Funding</th> </tr> </thead> <tbody> <tr> <td>Interstate 205: Stafford Road to Oregon 99 East</td> <td>\$12,500,000</td> <td>\$15,000,000</td> </tr> <tr> <td>Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) (not including HB 2017 funding)</td> <td>\$9,400,000</td> <td>\$11,900,000</td> </tr> <tr> <td>Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)</td> <td>\$20,391,997</td> <td>\$25,391,997</td> </tr> <tr> <td>TOTAL</td> <td>\$42,291,997</td> <td>\$52,291,997</td> </tr> </tbody> </table>	Project	Current Funding	Proposed Funding	Interstate 205: Stafford Road to Oregon 99 East	\$12,500,000	\$15,000,000	Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl’s Ferry Road) (not including HB 2017 funding)	\$9,400,000	\$11,900,000	Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)	\$20,391,997	\$25,391,997	TOTAL	\$42,291,997	\$52,291,997
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Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)	\$20,391,997	\$25,391,997														
TOTAL	\$42,291,997	\$52,291,997														

Additional Details:	The IGA is the “Funding Contribution Agreement: I-205, OR217, and Rose Quarter” and was approved on February 6, 2018.
Why a Formal amendment is required?	Cost increases at or greater than 20% for \$1 million or higher programmed projects require a formal amendment per the Amendment Matrix. The additional \$2.5 million equals a 20% increase to the project
Total Programmed Amount:	The total project programmed amount increases from \$12,500,000 to \$15,000,000.
Added Notes:	Approval from the Oregon Transportation Commission (OTC) was required for this project. OTC approval occurred during their March 2017 meeting.

6. Project: Portland to Milwaukie Light Rail (2019)	
Lead Agency:	TriMet
ODOT Key Number:	20843
	MTIP ID Number: 70929
Project Description:	This project extends light rail from PSU in downtown Portland to Milwaukie and north Clackamas County. It includes a multi-modal bridge carrying light rail, streetcar, buses, bicycles and pedestrians.
What is changing?	<p>The amendment increases the estimated FFY 2019 5309 grant allocation based on the Annual Report on Funding Recommendations for FY 2019 – FTA 5309 Capital Investment Grants Program.</p> <p>The approved 5309 grant allocation to the Portland – Milwaukie Light Rail project increases from \$38,000,000 to \$65,664,144.</p> <div data-bbox="1019 814 1399 1144" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center;">Annual Report on Funding Recommendations</p> <p style="text-align: center;">Fiscal Year 2019 Capital Investment Grants Program</p> <p style="text-align: center;"><small>Report of the Secretary of Transportation to the United States Congress Pursuant to 49 USC 5309(o)(1) and Section 3005(o)(1) of the Fixing America's Surface Transportation Act</small></p> <p style="text-align: center;"><small>February 2018</small></p> <p style="text-align: center;"><small>Prepared by: Federal Transit Administration</small></p> <p style="text-align: center;"><small>Available from: Federal Transit Administration Office of Planning and Environment 1200 New Jersey Avenue, SE Washington, DC 20590</small></p> </div> <p>The <i>Annual Report on Funding Recommendations</i> is issued by the United States Secretary of Transportation to help inform the appropriations process for the upcoming fiscal year (FY) by providing information on projects that have been submitted to the Federal Transit Administration’s (FTA) discretionary Capital Investment Grants Program.</p> <p>Since 1964, Congress has provided Federal funds to supplement certain local transit projects. In FY 2017, Congress provided \$9.1 billion in formula funds distributed to state and local governments for local transit projects. The CIG Program supplements those expenditures with additional financial resources for transit capital projects that are locally planned, implemented, and operated. It provides discretionary funding for fixed guideway investments such as new and expanded heavy rail, commuter rail, light rail, streetcars, bus rapid transit, and ferries as well as corridor-based bus rapid transit investments that emulate the features of rail.</p> <p>There are three categories of eligible projects under the CIG program: New Starts, Small Starts, and Core Capacity. New Starts and Core Capacity projects are required by law to go through a three phase process - Project Development, Engineering, and Construction. Small Starts projects are required by law to go through a two phase process - Project Development and Construction. As defined in law, New Starts projects are those whose sponsors request \$100 million or more in Capital Investment Grants Program funds <u>or</u> have an anticipated total capital cost of \$300 million or more. Core Capacity projects are substantial investments in existing fixed-guideway corridors that are at capacity today or will be in five years, where the proposed project will increase capacity by not less than 10 percent. Small Starts projects are those whose sponsors request less than \$100 million in Capital Investment Grants Program funds <u>and</u> have an anticipated total capital cost of less than \$300 million.</p>

	<p>Section 5309 CIG funding is provided for a portion of the total project cost, including design and construction. By law, New Starts projects are limited to a maximum Section 5309 CIG program share of 60 percent, and Core Capacity and Small Starts projects are limited to a maximum Section 5309 CIG program share of 80 percent.</p> <p>Previous programming for the project was based on early estimates in 2019 for eligible projects. The FTA <i>Annual Report on Funding Recommendations</i> provides the approved updates for 2019.</p>
Additional Details:	The specific funding recommendations are stated on page 5 of the document in Table 1, "FY 2019 Funding Recommendations for the Section 5309 Capital Investment Grants (CIG) Program
Why a Formal amendment is required?	Cost changes above 20% to projects with than exiting cost of \$1 million or more require a formal MTIP Amendment
Total Programmed Amount:	The project 5309 amount increases to \$65,664,144. The local funding contribution increases to \$51,851,705. The revised total project programming amount is now \$117,515,849.
Added Notes:	

Note: The Amendment Matrix at right is included as a reference the rules and justification for Formal Amendment and Administrative Modifications that the MPOs and ODOT must follow

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

ODOT-FTA-FHWA Amendment Matrix	
Type of Change	
FULL AMENDMENTS	
1.	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized
2.	Major change in project scope. Major scope change includes: <ul style="list-style-type: none"> • Change in project termini - greater than .25 mile in any direction • Changes to the approved environmental footprint • Impacts to AQ conformity • Adding capacity per FHWA Standards • Adding or deleting worktype
3.	Changes in Fiscal Constraint by the following criteria: <ul style="list-style-type: none"> • FHWA project cost increase/decrease: <ul style="list-style-type: none"> • Projects under \$500K – increase/decrease over 50% • Projects \$500K to \$1M – increase/decrease over 30% • Projects \$1M and over – increase/decrease over 20% • All FTA project changes – increase/decrease over 30%
4.	Adding an emergency relief permanent repair project that involves substantial change in function and location
ADMINISTRATIVE/TECHNICAL ADJUSTMENTS	
1.	Advancing or Slipping an approved project/phase within the current STIP (if slipping outside current STIP, see Full Amendments #2)
2.	Adding or deleting any phase (except CN) of an approved project below Full Amendment #3
3.	Combining two or more approved projects into one or splitting an approved project into two or more, or splitting part of an approved project to a new one
4.	Splitting a new project out of an approved program-specific pool of funds (but not reserves for future projects) or adding funds to an existing project from a bucket or reserve if the project was selected through a specific process (i.e. ARTIS, Local Bridge...)
5.	Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data
6.	Changing name of project due to change in scope, combining or splitting of projects, or to better conform to naming convention. (For major change in scope, see Full Amendments #2)
7.	Adding a temporary emergency repair and relief project that does not involve substantial change in function and location.

- 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 March 2018 Formal MTIP amendment will include the following:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	March 28, 2018
• TPAC notification and approval recommendation.....	April 6, 2018
• JPACT approval and recommendation to Council.....	April 19, 2018
• Completion of public notification process.....	April 26, 2018
• Metro Council approval.....	May 3, 2018*

*Note: If any significant public comments are received that are deemed necessary for review by JPACT, the impacted projects or complete amendment will be pulled from the Metro Council agenda and returned to JPACT for their review and direction.

USDOT Approval Steps:

<u>Action</u>	<u>Target Date</u>
• Metro development of amendment narrative package	May 4, 2018
• Amendment bundle submission to ODOT for review.....	May 7, 2018
• Submission of the final amendment package to USDOT.....	May 11, 2018
• ODOT clarification and approval.....	Mid May , 2018
• USDOT clarification and final amendment approval.....	Late May/Early June 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 ACTIONS:

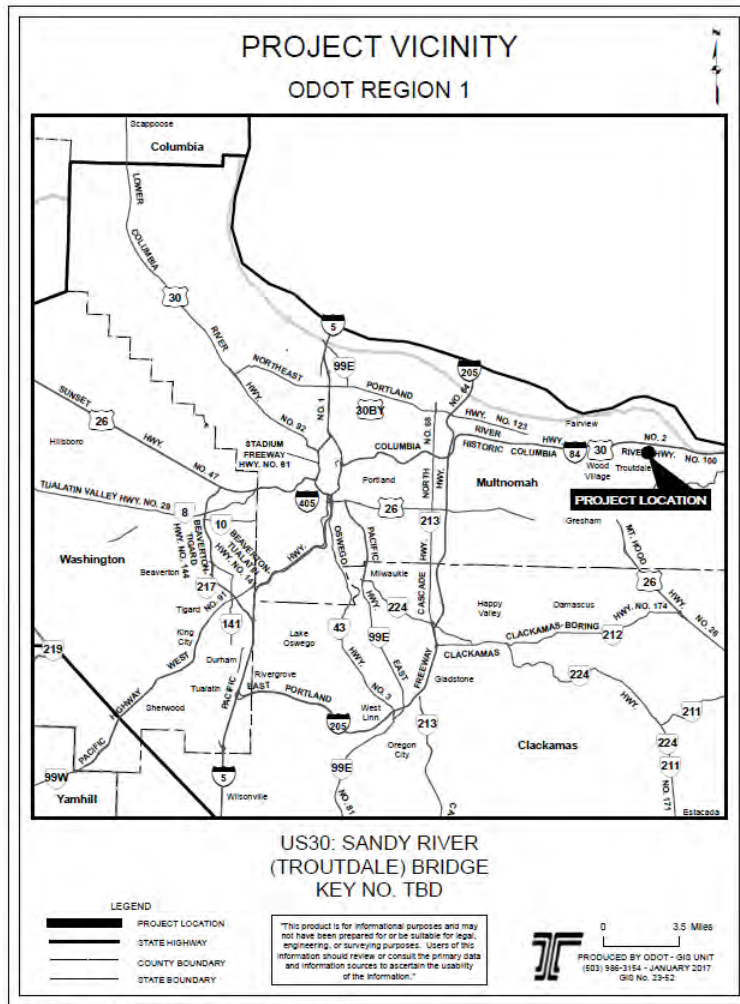
JPACT recommends Metro Council approve Resolution 18-4883 that include the following additions to the supporting materials and amendment processes:

1. Expand the summary information in the preview tables to provide additional details about each project amendment as needed.
2. Expand the preview summary in the Public Notification and Exhibit A tables to include applicable references and information about the 2016 JPACT action to bond a subset of RFFA funds to develop the high capacity transit, highway bottleneck and active transportation projects in preparation for potential state and regional investments for the three impacted project in this formal amendment.
3. Explore and develop follow-on reporting processes concerning how the MTIP amendment programming actions result in the final construction phase contracting decisions, bid awards, etc. from an equity perspective and report back to TPAC on a periodic basis as a way to close the circle from the initial MTIP programming and amendment process to the final contractor selection for the construction phase.

Staff comments to the above four TPAC modified approval recommendations: Staff concurs with all three approval recommendations in support of Resolution 18-4883 as follows:

- a. The "Required Changes" field preview summary tables in Exhibit A and the Public Notification tables include additional change details about the project amendment.
- b. The three bond related projects (in Key - 21179, OR217 SW 72nd Ave to OR10-Scholl's Ferry Rd, Key 19071 - Rose Quarter Improvement Project, and Key 19786 - I-205 Stafford Rd to OR99E) had additional bond related details added to the preview summary tables for both Exhibit A and the Public Notification Tables
- c. The request to develop a summary report concerning the final construction phase contractor selection and its impact upon equity is an endeavor that has an existing desire for additional discussion. Staff will coordinate with a parallel effort, the Construction Career Pathways project to help refine and determine the requirements TPAC has requested. Staff will bring progress report back to TPAC in the near future concerning the contracting equity reporting item request.

Attachment: Project Location Maps and OTC Staff Report copies





Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: December 4, 2017

TO: Oregon Transportation Commission
[Original signature on file]

FROM: Matthew L. Garrett
Director

SUBJECT: **Consent 9** – Amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to split one new bridge project (Interstate 5 over Crowson Road Northbound and Southbound Bridges) from an existing project (Interstate 5: California State Line – Ashland Paving) and to remove painting from another current project (U.S. 30: Sandy River Bridge).

Requested Action:

Request approval to amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to revise funding of three projects.

- Reduce funding for the Interstate 5: California State Line – Ashland Paving project by removing the Interstate 5 over Crowson Road northbound and southbound bridges in Ashland from the existing project. The total estimated cost for Interstate 5: California State Line – Ashland Paving will change from \$17,234,604 to \$16,724,604. The \$510,000 reduction will be transferred to the new project – Interstate 5 over Crowson Road Northbound and Southbound bridges.
- Change the scope of the U.S. 30: Sandy River (Troutdale) Bridge project located in Region 1. ODOT has determined the bridges do not need to be painted. Savings from this action total \$4,580,000, of which \$1,246,615 will be directed to a new Interstate 5 over Crowson Road project. The remaining savings of \$3,333,385 will be returned to the State Bridge Program.
- Create a new project named Interstate 5 over Crowson Road Northbound and Southbound Bridges. Funding for the new project will come from State Bridge Program funds that are currently associated with the bridges in the Interstate 5: California State Line – Ashland project and the U.S. 30: Sandy River (Troutdale) Bridge project. Total estimated cost of this project is \$1,756,615.

STIP Amendment Funding Summary

Project	Current Funding	Proposed Funding
Interstate 5 over Crowson Road NB and SB Bridges (Ashland) (new project)	\$0	\$1,756,615
U.S. 30: Sandy River (Troutdale) Bridge	\$6,315,000	\$1,735,000
State Bridge Program FFY 2018	\$1,175,105	\$4,508,490
Interstate 5: California State Line – Ashland Paving	\$17,234,604	\$16,724,604
TOTAL	\$24,724,709	\$24,724,709

Project to be added:

Interstate 5 over Crowson Road Northbound and Southbound Bridges (Ashland) (KN TBD)			
Phase	Year	Cost	
		Current	Proposed
Preliminary Engineering	N/A*	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	2018	\$0	\$1,756,615
TOTAL		\$0	\$1,756,615

* Preliminary engineering is in its final stages and will be completed under the Interstate 5: California State Line – Ashland Paving project.

Project to be reduced:

U.S. 30: Sandy River (Troutdale) Bridge (KN 20703)			
Phase	Year	Cost	
		Current	Proposed
Preliminary Engineering	2017	\$565,000	\$270,000
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	2019	\$5,750,000	\$1,465,000
TOTAL		\$6,315,000	\$1,735,000

Project to be increased:

State Bridge Program FFY 2018 (KN 20731)			
Phase	Year	Cost	
		Current	Proposed
Preliminary Engineering	N/A	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
Other	2018	\$1,175,105	\$4,508,490
TOTAL		\$1,175,105	\$4,508,490

Oregon Transportation Commission
 December 4, 2017
 Page 3

Project to be reduced:

Interstate 5: California State Line – Ashland Paving (KN 18873)			
Phase	Year	Cost	
		Current	Proposed
Preliminary Engineering	2015	\$996,000	\$996,000
Right of Way	2018	\$5,000	\$5,000
Utility Relocation	2018	\$5,000	\$5,000
Construction	2018	\$16,228,604	\$15,718,604
TOTAL		\$17,234,604	\$16,724,604

Background:

The U.S. 30: Sandy River Bridge project in Troutdale originally intended to replace the sidewalks, repair the foundation and paint the bridge. As the design team developed the project ODOT determined that the bridge painting is in good condition and it is not necessary to repaint the bridge at this time. The project will continue to include sidewalk replacements and foundation repair. Savings associated with not painting the bridge total \$4,580,000.

The Interstate 5 over Crowson Road northbound and southbound bridges in Ashland (08746N and 08746S at milepoint 13.29) were built in 1963. The deck on the northbound bridge was replaced as part of a widening project in 2000. A concrete overlay that was provided on the southbound bridge in 2002 is reaching the end of its service life. Both bridges were added in December 2015 to the Interstate 5: California State Line - Ashland Paving project for polymer concrete deck overlays. This overlay type is appropriate for decks that are in good structural condition and require a minimum of surface preparation. During project development, ODOT discovered that both concrete decks are contaminated with chlorides to a much greater extent than was originally thought. Thus, a polymer concrete deck overlay is not appropriate.

Due to the need to remove a significant portion of the existing decks, a structural overlay is needed. Since a structural overlay requires traffic control, construction duration, and crossovers that are beyond the scope of a polymer overlay project, these bridge repairs will require additional funding. In addition, the proximity of these bridges to the new Siskiyou Rest Area/Welcome Center, and the timing of its 2018 opening, necessitate the completion of the Crowson Road bridges in advance to eliminate the need to close the rest area/welcome center for several months just shortly after its opening. The design team investigated accelerating the Interstate 5: California State Line – Ashland project and determined it was not possible to do so. These circumstances require the Crowson Road bridges to be removed from the Interstate 5: California State Line - Ashland Paving project and addressed as a new separate project with an estimated construction cost of \$1,756,615.

With Commission approval, the State Bridge Program will be able to start work on the Crowson Road bridges on Interstate 5 with funding from the other two projects with minimal impact to the new Siskiyou Rest Area/Welcome Center. In addition, the additional funding back into the Bridge Program enables bringing future projects to the Commission for approval. Without approval, the Crowson Road

bridge structure will continue to deteriorate, ultimately requiring a minimum of a structural overlay, and perhaps a deck replacement, depending on when the work is programmed.

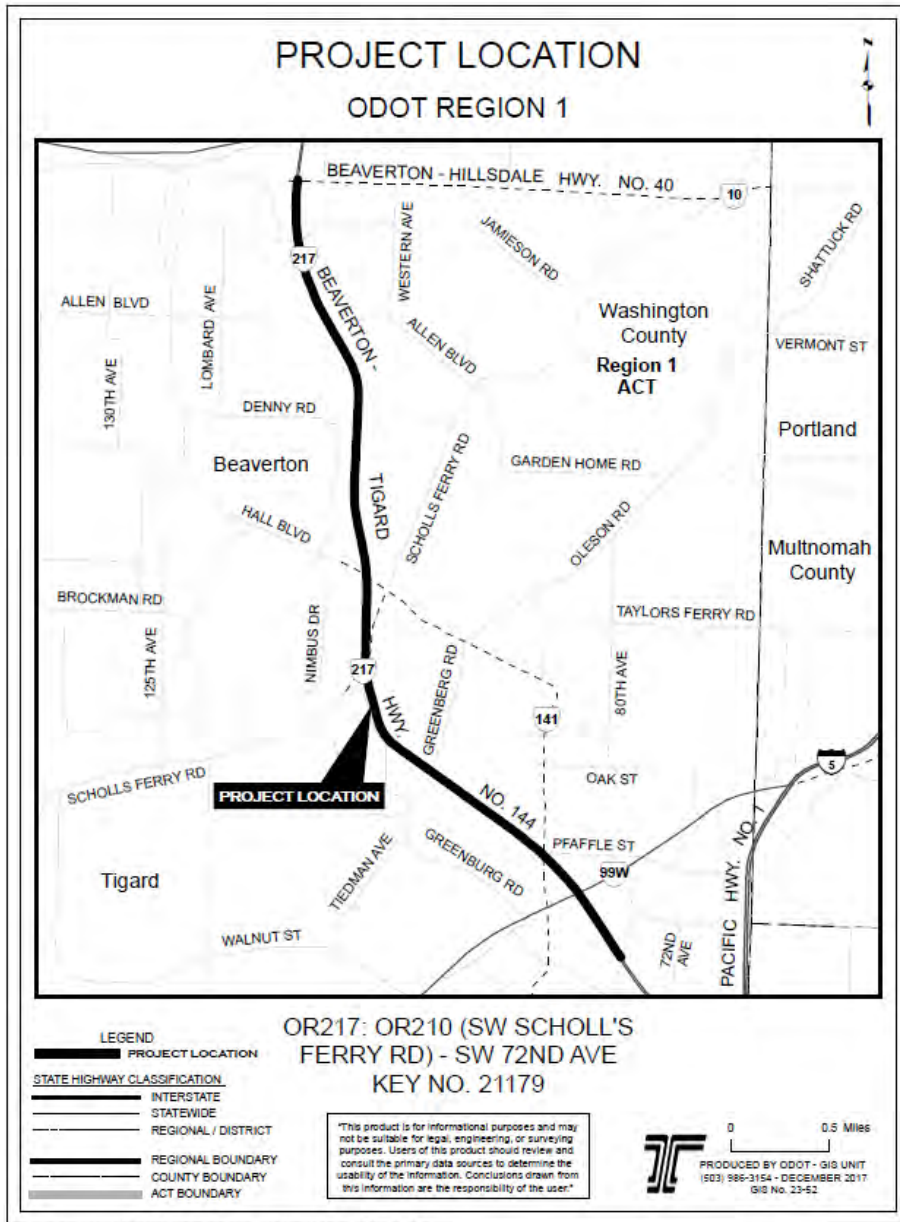
Attachments:

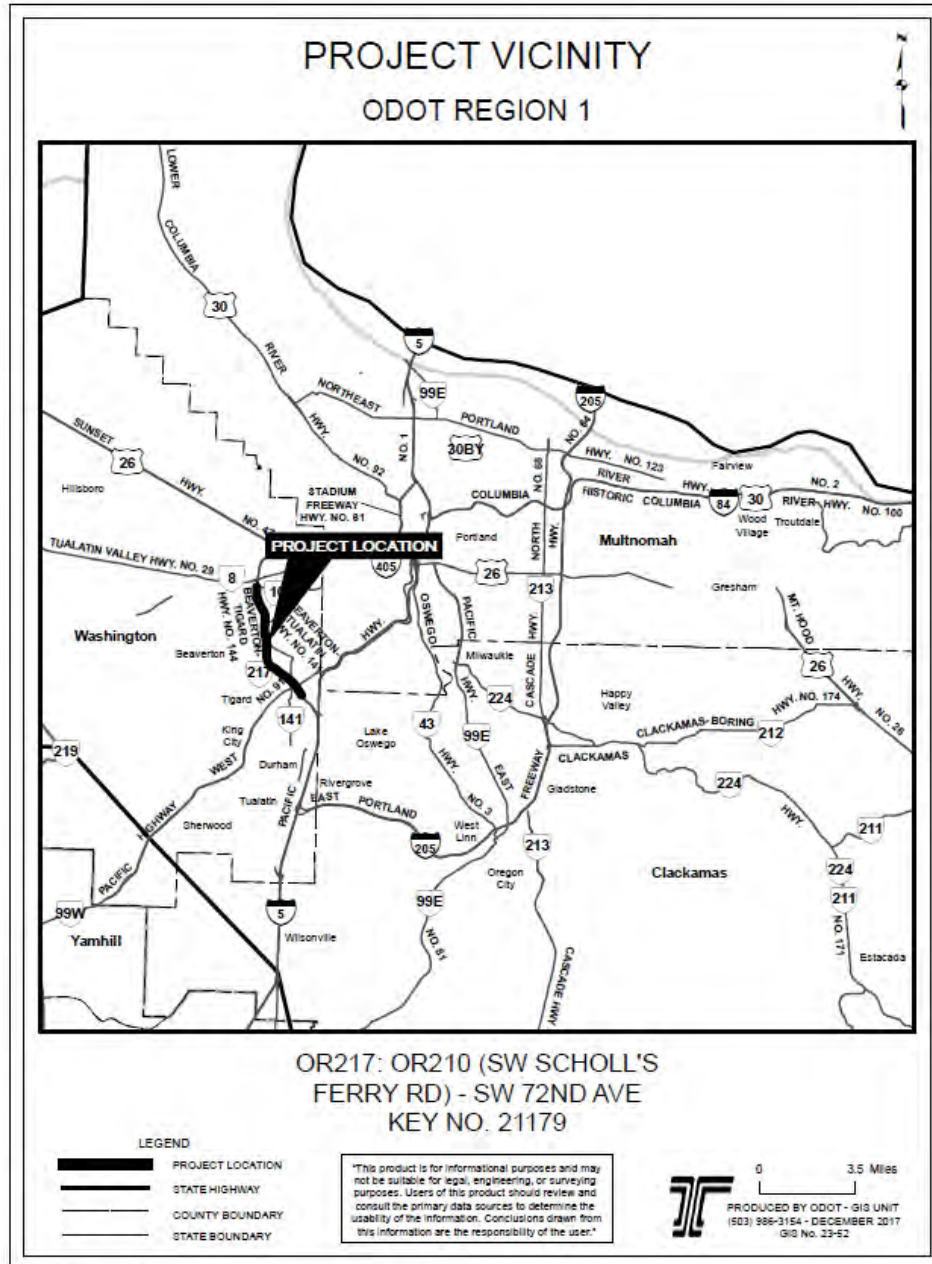
- Attachment 1 - Location and Vicinity Maps

Copies (w/attachment) to:

Jerri Bohard	Travis Brouwer	Tom Fuller	Bob Gebhardt
Paul Mather	McGregor Lynde	Fariborz Pakseresht	Jeff Flowers
Amanda Sandvig	Arlene Santana	Frank Reading	Naomi Birch
Rian Windsheimer	Vaughan Rademeyer	Rachelle Nelson	Lynn Averbek

Key 21179
OR217: SW 72nd Ave - OR10 (SW Scholl's Ferry Rd)





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Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 5, 2018
TO: Oregon Transportation Commission

[Original signature on file]

FROM: Matthew L. Garrett
 Director

SUBJECT: **Consent 14** - Amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to add funds to three projects in Region 1.

Requested Action:

Request approval to amend the 2018-2021 Statewide Transportation Improvement Program (STIP) to receive funding from TriMet for the following Region 1 projects by a total of \$10,000,000 with funds allocated per agreement.

- \$2,500,000 will be added to the planning phase of the Interstate 205: Stafford Road to Oregon Highway 99 East project;
- \$2,500,000 will be added to the preliminary engineering phase of the Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road) project; and
- \$5,000,000 will be added to the preliminary engineering phase of the Interstate 5 Rose Quarter Improvement Project.

STIP amendment funding summary

Project	Current Funding	Proposed Funding
Interstate 205: Stafford Road to Oregon 99 East	\$12,500,000	\$15,000,000
Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road) (not including HB 2017 funding)	\$9,400,000	\$11,900,000
Interstate 5 Rose Quarter Improvement Project (not including HB 2017 funding)	\$20,391,997	\$25,391,997
TOTAL	\$42,291,997	\$52,291,997

Oregon Transportation Commission
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 Page 2

Project to be increased

Interstate 205: Stafford Road – Oregon 99E (KN:19786)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	2016	\$12,500,000	\$15,000,000
Preliminary Engineering	N/A	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
Other	2019	\$0	\$0
TOTAL		\$12,500,000	\$15,000,000

Project to be increased

Oregon 217: SW 72nd Ave – Oregon 10 (SW Scholl's Ferry Road) (KN:21179)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	N/A	\$0	\$0
Preliminary Engineering	2018	\$9,400,000	\$11,900,000
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
Other	N/A	\$0	\$0
TOTAL		\$9,400,000	\$11,900,000

Project to be increased

Interstate 5 Rose Quarter Improvement Project (KN:19071)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	N/A	\$0	\$0
Preliminary Engineering	2016	\$20,391,997	\$25,391,997
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
Other	N/A	\$0	\$0
TOTAL		\$20,391,997	\$25,391,997

Background:

In 2016, the Metro Joint Policy Committee on Transportation (JPACT) voted to bond a subset of Regional Flexible Fund dollars to demonstrate their commitment to three key highway bottlenecks. TriMet will sell bonds to provide upfront funding for project development work on a total of four projects: the three highway bottleneck projects and the Southwest Corridor High Capacity Transit project.

Consent_14_TriMet_Fund_Ltr.docx
 2/21/2018

TriMet has agreed to provide \$10 million to ODOT in two installments, the first \$5 million within 30 days of written request by ODOT, and the second payment of \$5 million no earlier than 2020. The attached Intergovernmental Agreement (IGA) describes the complete set of terms, including ODOT's commitment to provide an annual report to the Joint Policy Advisory Committee on Transportation (JPACT) on the status of the projects (Attachment 2).

The three highway bottleneck projects receiving funding through this IGA are:

Interstate 5 Rose Quarter Improvement Project

This project addresses the one-mile section of Interstate 5 between the interchanges of Interstate 405 and Interstate 84, which includes the network of surface streets associated with the Broadway/Weidler interchange. This section of Interstate 5 has extremely high traffic volumes, closely spaced interchanges, and no shoulders, all of which contribute to it having one of the highest crash rates in Oregon. This section of highway also experiences chronic congestion resulting in significant costs to the economy and hindrance to the movement of goods and people.

This project will also add new auxiliary lanes and shoulders on Interstate 5 to improve safety and operations by providing more space for merging and weaving between Interstate 84 and Interstate 405. Rebuilding the overpasses as lids could provide new community connections and surface area to support enhanced bicycle and pedestrian facilities. A new bicycle and pedestrian bridge and upgrades to the bridges across Interstate 5 will provide safer and more convenient connections for all modes of travel.

Funding listed in in the chart above and programmed in the STIP is for preliminary engineering. HB 2017 included funding for construction that will be programmed in the 2021-2024 STIP.

Interstate 205: Stafford Road to Oregon 99 East

Interstate 205 has six lanes for most of its 25-mile length but only four lanes between exit 3 (Stafford Road, Lake Oswego) and exit 9 (Oregon 99E, Oregon City). Between 80,000 and 100,000 vehicles travel this narrow section of the highway on an average day. Closely-spaced interchanges on either end of the Abernethy Bridge contribute to the safety, mobility and reliability issues in this area.

This project adds a third lane on Interstate 205 in each direction between Abernethy Bridge and Stafford Road to improve traffic operations, improve access to industrial lands in East Clackamas County and improve safety. It will also ensure the bridge remains functional after a catastrophic earthquake.

Funding listed in in the chart above and programmed in the STIP is for preliminary engineering. Funding has not yet been identified for construction of this project.

Oregon 217: Southwest 72nd Avenue to Oregon 10 (Southwest Scholl's Ferry Road)

This project addresses mainline safety and operations improvements for 2.39 miles of Northbound Oregon 217 between SW 72nd Avenue and Southwest Scholls Ferry Road. Oregon 217 serves 120,000

trips per day, connects Interstate 5 and U.S. 26 and provides access to major regional destinations such as Washington Square Mall and Beaverton Regional Center. The primary safety and operational deficiencies on Oregon 217 include tight interchange spacing and short weaving sections resulting in an average of 200 accidents per year.

This project will add new auxiliary lanes between the northbound off-ramp at Oregon 99 West and the Scholls Ferry Road exit and will replace the Hall Boulevard overcrossing. The auxiliary lane are expected to reduce crashes by 30 to 70 percent and improve traffic reliability.

Funding listed in in the chart above and programmed in the STIP is for preliminary engineering. HB 2017 included funding for construction that will be programmed in the 2021-2024 STIP.

Options:

With approval, the TriMet funds will be programmed for the respective project planning and design phases as currently scheduled.

Without approval, the TriMet funds will not be added to the STIP for these projects. The projects will move forward as currently funded likely resulting in delay and the eventual need to reduce project elements.

Attachments:

- Attachment 1 - Location and Vicinity Maps
- Attachment 2 – ODOT/TriMet Intergovernmental Agreement

Key 19071

I-5 Rose Quarter project

Note: OTC letter is the same as for Key 21179



Southern Section



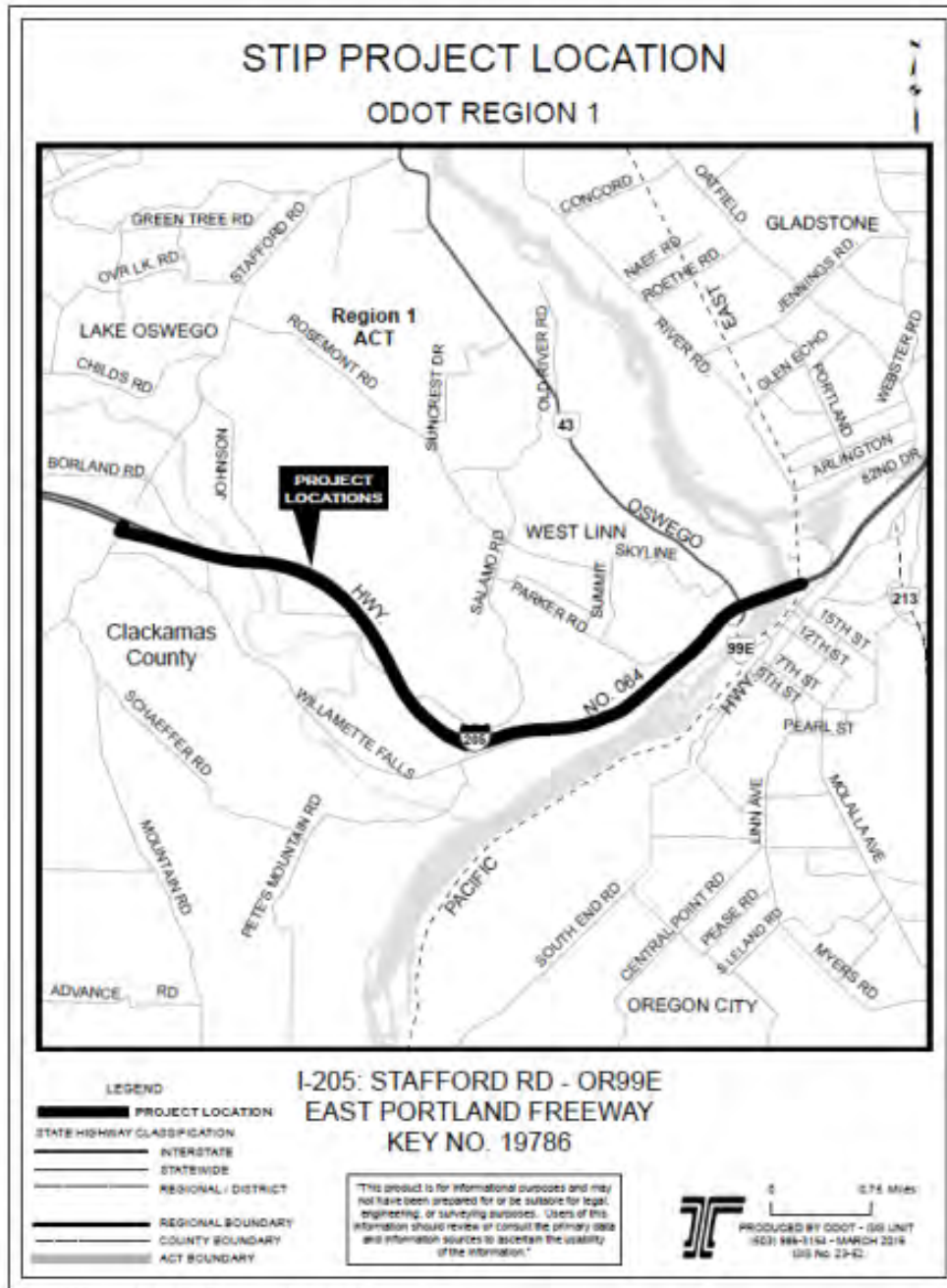
Northern Section

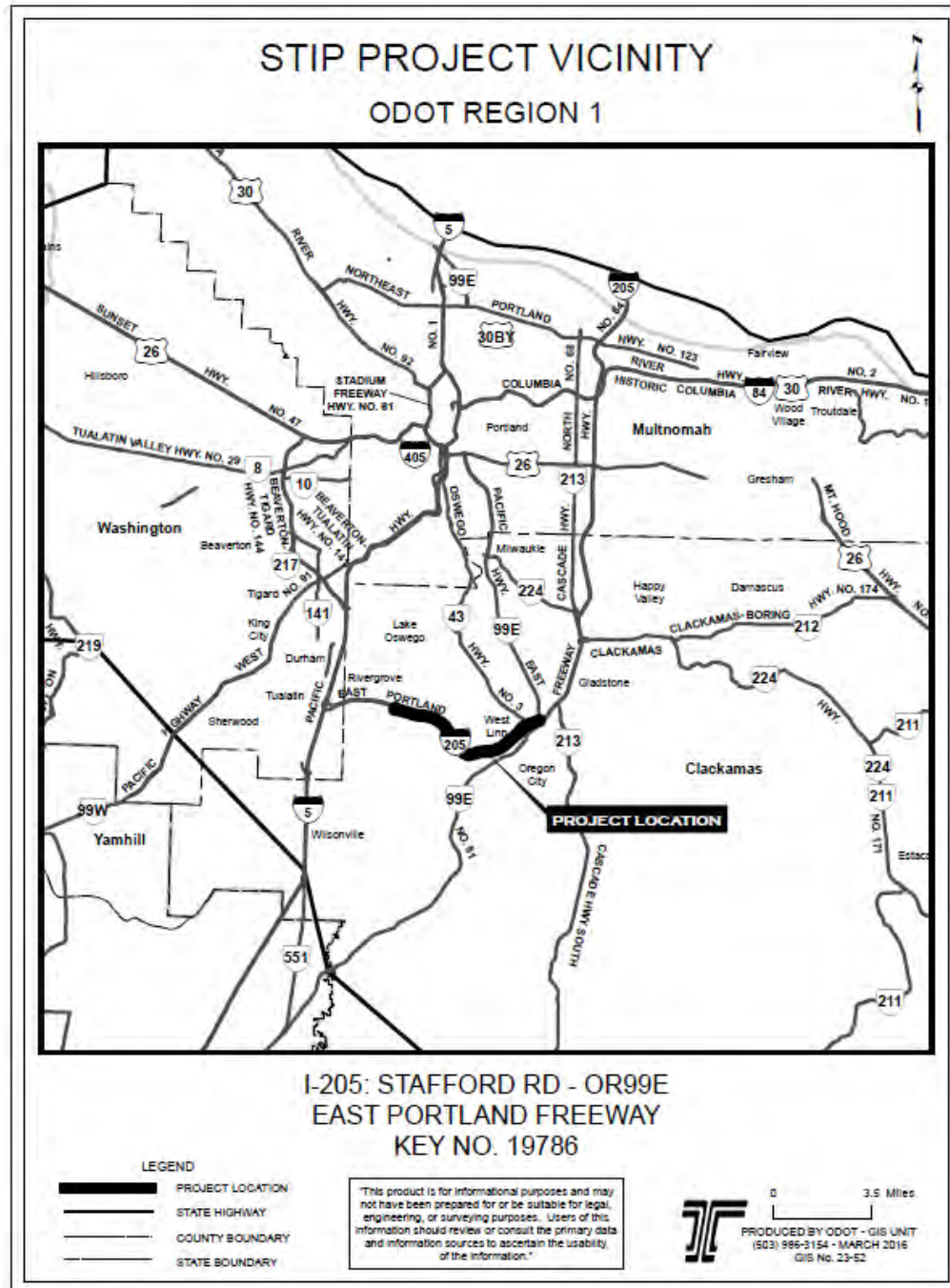


Key 19786

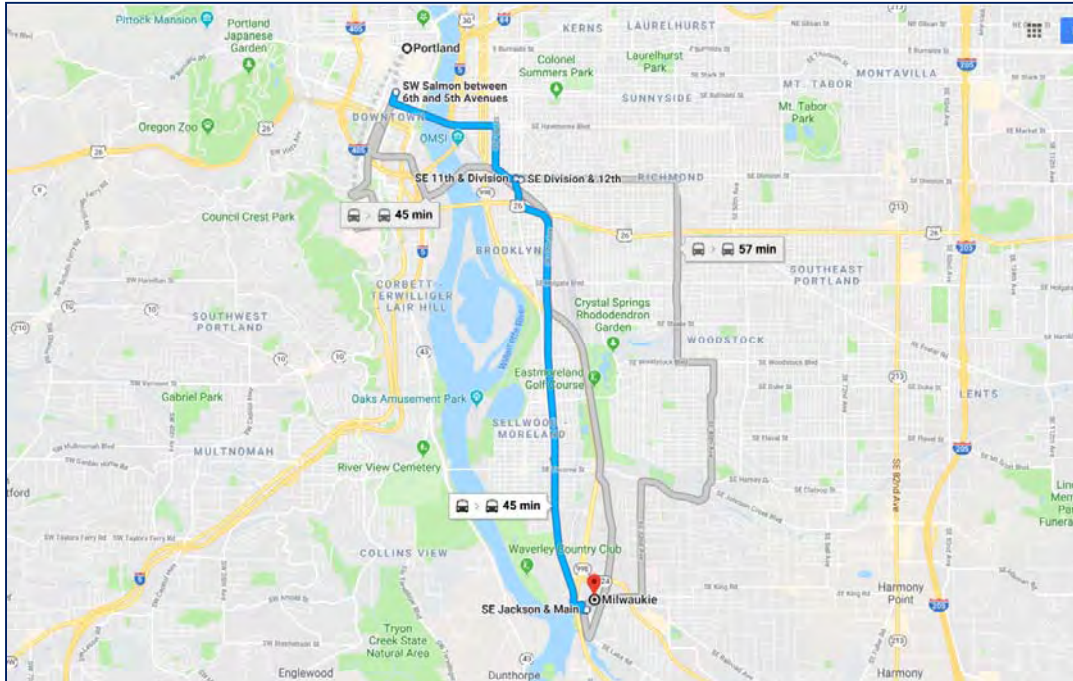
I-205: Stafford Rd to Oregon 99 East


Note: OTC letter is the same as for Key 21179






Key 20843
Portland to Milwaukie Light Rail (2019)





U.S. Department of Transportation
Federal Transit Administration



FACT SHEET:
FIXED GUIDEWAY CAPITAL INVESTMENT GRANTS
Chapter 53 Section 5309

	FY15 /MAP-21	FY16 (millions)	FY17 (millions)	FY18 (millions)	FY19 (millions)	FY20 (millions)
Section 5309	\$2,120.0	\$2,301.8	\$2,301.8	\$2,301.8	\$2,301.8	\$2,301.8

PROGRAM PURPOSE:
 The discretionary Capital Investment Grant (CIG) program provides funding for fixed guideway investments such as new and expanded rapid rail, commuter rail, light rail, streetcars, bus rapid transit, and ferries, as well as corridor-based bus rapid transit investments that emulate the features of rail. There are four categories of eligible projects under the CIG program: New Starts, Small Starts, Core Capacity, and Programs of Interrelated Projects:

Table 1 - FY 2019 Funding Recommendations for the Section 5309 Capital Investment Grants (CIG) Program

	Mode	Total Project Cost	Section 5309 CIG Request	Section 5309 CIG Share	Section 5309 CIG Funds Appropriated/Allocated Through FY 2017	Remaining Section 5309 CIG Funding Needs After FY 2017	President's FY 2018 CIG Budget Proposal	FY 2019 Section 5309 CIG Funding Recommendations
Existing New Starts Full Funding Grant Agreements (FFGAs)								\$ 835,664,144
Existing Core Capacity Full Funding Grant Agreements								\$ 200,000,000
Oversight - 1% take-down by statute								\$ 10,461,254
Total								\$ 1,046,125,398
Existing New Starts FFGAs								
CA	Los Angeles, Regional Connector	LRT	\$ 1,402,932,490	\$ 669,900,000	47.7%	\$ 365,000,000	\$ 304,900,000	\$ 100,000,000
CA	Los Angeles, Westside Subway Section 1	HR	\$ 2,821,957,153	\$ 1,250,000,000	44.3%	\$ 365,000,000	\$ 885,000,000	\$ 100,000,000
CA	Los Angeles, Westside Subway Section 2	HR	\$ 2,499,239,536	\$ 1,187,000,000	47.5%	\$ 200,000,000	\$ 987,000,000	\$ 100,000,000
CA	San Diego, Mid-Coast Corridor Transit Project	LRT	\$ 2,171,200,545	\$ 1,043,380,000	48.1%	\$ 150,000,000	\$ 893,380,000	\$ 100,000,000
MA	Boston Green Line Extension	LRT	\$ 2,297,618,856	\$ 996,121,000	43.4%	\$ 400,000,000	\$ 596,121,000	\$ 150,000,000
MD	Maryland National Capital Purple Line	LRT	\$ 2,407,030,286	\$ 900,000,000	37.4%	\$ 328,000,000	\$ 572,000,000	\$ 120,000,000
OR	Portland, Portland-Milwaukie Light Rail Project	LRT	\$ 1,490,350,173	\$ 745,175,087	50.0%	\$ 379,510,943	\$ 165,664,144	\$ 100,000,000
TX	Fort Worth, TEX Rail	CR	\$ 1,034,411,952	\$ 499,390,221	48.3%	\$ 234,000,000	\$ 243,390,221	\$ 100,000,000
Subtotal			\$ 16,124,740,971	\$ 7,290,966,308		\$ 2,641,510,943	\$ 4,649,455,365	\$ 835,664,144
Existing Core Capacity FFGAs								
CA	San Carlos, Peninsula Corridor Electrification Project	CR	\$ 1,930,670,934	\$ 647,000,000	33.5%	\$ 172,956,593	\$ 474,043,407	\$ 100,000,000
IL	Chicago, Red and Purple Line Modernization Project Phase One	HR	\$ 2,066,702,783	\$ 956,607,772	46.3%	\$ 291,131,640	\$ 665,476,132	\$ 100,000,000
Subtotal			\$ 3,997,373,717	\$ 1,603,607,772		\$ 464,088,233	\$ 1,139,519,539	\$ 200,000,000
Other Projects That May Become Ready for Funding *							\$ 111,750,149	

The FY 2019 CIG budget request includes \$1 billion in new budget authority and \$46 million in anticipated prior year recoveries for a total of \$1.046 billion.

LRT = light rail transit, HR = heavy rail, CR = commuter rail

* The President's FY 2018 Budget Proposal included \$111,750,149 million for "Other projects that may become ready for funding" and noted, "The FFGA for the Caltrain Peninsula Corridor Electrification Project is planned to be signed shortly and the Maryland National Capital Purple Line FFGA remains under review due to pending litigation." Both FFGAs have since been signed.

Agenda Item No. 5.1

Resolution No. 18-4891, For the Purpose of
Proclaiming May 5, 2018 as a Day of Awareness for
Missing and Murdered Native Women and Girls

Resolutions

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF PROCLAIMING MAY 5,)	RESOLUTION NO. 18-4891
2018 AS A DAY OF AWARENESS FOR)	
MISSING AND MURDERED NATIVE WOMEN)	Introduced by Council President Tom
AND GIRLS	Hughes

WHEREAS, Metro stands with other tribal, local, regional, state and national governments and organizations in support of National Day of Awareness for Missing and Murdered Native Women and Girls; and

WHEREAS, the lasting effect of colonization and a history of oppressive policies directly correlates to the rise of violence against Native women and girls, which is in direct conflict with tribal cultural values; and

WHEREAS, the disappearances and murders of Native women and girls is often directly connected to domestic violence, sexual assault or trafficking, which is a direct threat to tribal sovereignty and compromises Indian Country’s ability to heal from historic trauma; and

WHEREAS, American Indian and Alaska Native women are 2.5 times more likely to experience violent crimes – and at least twice as likely to experience rape or sexual assault crimes – compared to all other races, according to a 2013 National Congress of American Indian Policy Research Center report; now therefore,

BE IT RESOLVED that the Metro Council proclaims May 5, 2018 as a Day of Awareness for Missing and Murdered Native Women and Girls in the greater Portland region. We encourage other businesses, organizations, public institutions and community members to observe this day and learn and teach others about the acute crisis facing Native women and girls.

ADOPTED by the Metro Council this 3rd day of May 2018.

Shirley Craddick, Deputy Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 18-4891, FOR THE PURPOSE OF PROCLAIMING MAY 5, 2018 AS A DAY OF AWARENESS FOR MISSING AND MURDERED NATIVE WOMEN AND GIRLS

Date: 4/26/18

Prepared by: Maiya Osife

BACKGROUND

- American Indian and Alaska Native women are 2.5 times more likely to experience violent crimes – and at least twice as likely to experience rape or sexual assault crimes – compared to all other races, according to a 2013 National Congress of American Indian Policy Research Center report. On some reservations, Indigenous women are murdered at 10 times the national average rate.
- A 2016 National Institute of Justice–funded study revealed that a staggering 84% of Indigenous women have experienced violence in their lifetime, and 56% of Indigenous women are survivors of sexual violence.
- There remains insufficient data on the total number of missing Indigenous women in the United States or Canada because there’s been no centralized database for keeping that information.
- In 2013, the Canadian government began a national inquiry into Missing and Murdered Indigenous women and girls, but the United States has yet to take such action.
- Metro Council has the opportunity to stand with other tribal, local, regional, state and national governments and organizations in honoring May 5, 2018 as National Day of Awareness for Missing and Murdered Native Women and Girls.

ANALYSIS/INFORMATION

1. **Known Opposition:** None.
2. **Legal Antecedents:** March 29, 2018: City of Portland passed a resolution to proclaim May 5, 2018 as a Day of Awareness for Missing and Murdered Native Women and Girls.
3. **Anticipated Effects:** May 5, 2018 will be honored as a National Day of Awareness for Missing and Murdered Native Women and Girls.
4. **Budget Impacts:** None.

RECOMMENDED ACTION

It is recommended that Metro Council adopt resolution number 18-4891 proclaiming May 5, 2018 as National Day of Awareness for Missing and Murdered Native Women and Girls.

Agenda Item No. 5.2

Resolution No. 18-4873, For the Purpose of
Approving the FY 2018-19 Budget, Setting Property
Tax Levies and Transmitting the Approved Budget to
the Multnomah County Tax Supervising and
Conservations Commission

Resolutions

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE FY 2018-19 BUDGET, SETTING PROPERTY TAX LEVIES AND TRANSMITTING THE APPROVED BUDGET TO THE MULTNOMAH COUNTY TAX SUPERVISING AND CONSERVATION COMMISSION)

RESOLUTION NO 18-4873

Introduced by Tom Hughes, Council President

WHEREAS, the Metro Council, convened as the Budget Committee, has reviewed the FY 2018-19 Proposed Budget; and

WHEREAS, the Council, convened as the Budget Committee, has conducted a public hearing on the FY 2018-19 Proposed Budget; and

WHEREAS, pursuant to Oregon Budget Law, the Council, convened as the Budget Committee, must approve the FY 2018-19 Budget, and said approved budget must be transmitted to the Multnomah County Tax Supervising and Conservation Commission for public hearing and review; now, therefore,

BE IT RESOLVED,

- 1. That the Proposed FY 2018-19 Budget as amended by the Metro Council, convened as the Budget Committee, which is on file at the Metro offices, is hereby approved.
2. That property tax levies for FY 2018-19 are approved as follows:

SUMMARY OF AD VALOREM TAX LEVY

Table with 3 columns: Tax Category, Subject to the General Government Limitation, Excluded from the Limitation. Rows include Permanent Tax Rate, Local Option Tax Rate, and General Obligation Bond Levy.

3. That the Chief Operating Officer is hereby directed to submit the Approved FY 2018-19 Budget and Appropriations Schedule to the Multnomah County Tax Supervising and Conservation Commission for public hearing and review.

ADOPTED by the Metro Council this 3rd day of May, 2018.

Tom Hughes, Council President

APPROVED AS TO FORM:

Alison Kean, Metro Attorney

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 18-4873 APPROVING THE FY 2018-19 BUDGET, SETTING PROPERTY TAX LEVIES AND TRANSMITTING THE APPROVED BUDGET TO THE MULTNOMAH COUNTY TAX SUPERVISING AND CONSERVATION COMMISSION

Date: May 3, 2018

Presented by: Tim Collier
Director, Finance and Regulatory Services

BACKGROUND

On April 12, 2018, Martha Bennett, the Chief Operating Officer, presented the FY 2018-19 Proposed Budget to the Metro Council sitting as Budget Committee. A public hearing on the budget was held where the Council, sitting as Metro's Budget Committee, received testimony from interested members of the general public and Metro stakeholders.

The action taken by this resolution is the interim step between initial proposal of the budget and final adoption of the budget in June. Oregon Budget Law requires that Metro approve and transmit its budget to the Multnomah County Tax Supervising and Conservation Commission (TSCC). Members of the TSCC are appointed by the Governor to supervise local government budgeting and taxing activities in Multnomah County. The TSCC will hold a public hearing on Metro's budget scheduled for Thursday, June 7, 2018 at 12:30 p.m. in the Metro Council Chamber Annex. Following the meeting, the TSCC will provide a letter of certification for Metro's budget after which time the Council will formally adopt the final budget for FY 2018-19. The adoption of the budget is currently scheduled for Thursday, June 21, 2018.

Oregon Budget Law requires the Budget Committee of each local jurisdiction to set the property tax levies for the ensuing year at the time the budget is approved. Under budget law the Metro Council sits as the Budget Committee for this action. The tax levies must be summarized in the resolution that approves the budget and cannot be increased beyond this amount following approval. Metro's levy for general obligation debt reflects actual debt service levies for all outstanding general obligation bonds. The levy authorization for FY 2018-19 also includes year 1 of the renewed 5-year local option levy for Parks and Natural Areas support as well as the levy for Metro's permanent tax rate for general operations.

ANALYSIS/INFORMATION

1. **Known Opposition** – None known at this time.
2. **Legal Antecedents** – The preparation, review and adoption of Metro's annual budget is subject to the requirements of Oregon Budget Law, ORS Chapter 294. Oregon Revised Statutes 294.635 requires that Metro prepare and submit its approved budget to the Multnomah County Tax Supervising and Conservation Commission by May 15, 2018. The Commission will conduct a hearing on June 7, 2018 for the purpose of receiving information from the public regarding the Council's approved budget. Following the hearing, the Commission will certify the budget to the Council for adoption and may provide recommendations to the Council regarding any aspect of the budget.

3. **Anticipated Effects** – Adoption of this resolution will set the maximum tax levies for FY 2018-19 and authorize the transmittal of the approved budget to the Multnomah County Tax Supervising and Conservation Commission.
4. **Budget Impacts** – The total amount of the proposed FY 2018-19 annual budget is \$661,183,882. Any changes approved by the Council at the time of approval were incorporated into the budget prior to transmittal to the TSCC.

RECOMMENDED ACTION

The Council President recommends adoption of Resolution No. 18-4873 approving the FY 2018-19 budget and authorizing the Chief Operating Officer to submit the approved budget to the Multnomah County Tax Supervising and Conservation Commission.

Agenda Item No. 5.3

Resolution No. 18-4885, For the Purpose of Resolving a
Dispute Between the City of Wilsonville and the City of
Tualatin Regarding the Concept Plan for the Basalt Creek
Planning Area

Resolutions

Metro Council Meeting
Thursday, May 3, 2018
Metro Regional Center, Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF RESOLVING A) RESOLUTION NO. 18-4885
DISPUTE BETWEEN THE CITY OF)
WILSONVILLE AND THE CITY OF) Introduced by Chief Operating Officer Martha
TUALATIN REGARDING THE CONCEPT) Bennett in concurrence with Council
PLAN FOR THE BASALT CREEK PLANNING) President Tom Hughes
AREA)

WHEREAS, in 2004 Metro adopted Ordinance No. 04-1040B, which amended the Urban Growth Boundary to add 1,940 acres of land to satisfy an identified regional need for industrial land, including approximately 646 acres located between the City of Tualatin and the City of Wilsonville that is now known as the Basalt Creek Planning Area; and

WHEREAS, in 2007 Metro awarded a \$365,000 grant of construction excise tax funds to the cities of Tualatin and Wilsonville to undertake concept planning for the Basalt Creek Planning Area; and

WHEREAS, in 2011 Washington County, Metro, and the cities of Tualatin and Wilsonville entered into an Intergovernmental Agreement (IGA) that outlines the requirements and responsibilities of the parties regarding their coordinated efforts toward adopting a concept plan for the Basalt Creek Planning Area; and

WHEREAS, under the 2011 IGA, all parties must agree regarding the jurisdictional boundary between the cities and the planning designations in the concept plan before the county may transfer planning authority to the cities to facilitate future annexation and urban development; and

WHEREAS, between 2013 and 2016 the two cities engaged in a joint concept planning process for the Basalt Creek Planning Area, but reached an impasse in 2017 regarding the appropriate planning designation for a 52-acre portion of the planning area known as the “Central Subarea,” and asked Metro to take on the role of arbitrating their dispute; and

WHEREAS, on January 22, 2018 the two cities, Metro, and Washington County entered into an IGA that assigns Metro the task of creating a process for arbitrating the dispute between the cities and reaching a decision regarding the appropriate land use designation for the Central Subarea; and

WHEREAS, Metro created a special process for the arbitration wherein the Metro Chief Operating Officer (COO) agreed to accept written evidence and argument from the cities and county prior to issuing a written recommendation to the Metro Council that would be reviewed by the Council in an “on the record” proceeding; and

WHEREAS, the 2018 IGA and the arbitration process created by Metro recognize that Metro’s decision as arbitrator does not itself result in the adoption or amendment of any land use plan or map, and will not have any land use effects unless and until it is implemented by the cities through future city land use decisions that will be appealable to LUBA; and

WHEREAS, the Metro COO reviewed the evidence and argument submitted by the cities, Washington County, and two property owners, and issued her written COO Recommendation to the Metro Council on March 26, 2018 recommending that the cities should designate the Central Subarea for future employment use; and

WHEREAS, the Metro Council reviewed the COO Recommendation and all of the evidence that was placed in the record before the COO, and at the Council meeting on April 19, 2018 voted unanimously to approve the COO Recommendation; now therefore,

BE IT RESOLVED that:

1. The Metro Council approves the COO Recommendation and agrees that the cities should designate the 52-acre Central Subarea of the Basalt Creek Planning Area for employment purposes, as depicted on the Basalt Creek Land Use Concept Map attached to the COO Recommendation as Exhibit C.
2. The Metro Council adopts the COO Recommendation dated March 26, 2018, attached as Exhibit A to this Resolution and incorporated herein, as the Council's findings and conclusions in support of this decision.
3. The Metro Council also adopts the Supplemental Findings attached as Exhibit B to this Resolution and incorporated herein as the Council's supplemental findings and conclusions in support of this decision.

ADOPTED by the Metro Council this _____ day of May 2018

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

EXHIBIT A TO RESOLUTION 18-4885

Chief Operating Officer Recommendation to the Metro Council Regarding the Basalt Creek Planning Area

This is my recommendation to the Metro Council concerning the appropriate land use designation of a 52-acre portion of the Basalt Creek Planning Area known as the “Central Subarea,” which is identified in Figure 1 below. A decision by Metro on this issue is contemplated by the Intergovernmental Agreement (IGA) among Metro, the City of Tualatin, the City of Wilsonville, and Washington County creating a process for Metro to resolve the dispute between the two cities regarding whether the Central Subarea should be planned for employment or residential use. My recommendation is that the Central Subarea should be designated as an employment area, as shown on the Figure 1 map.

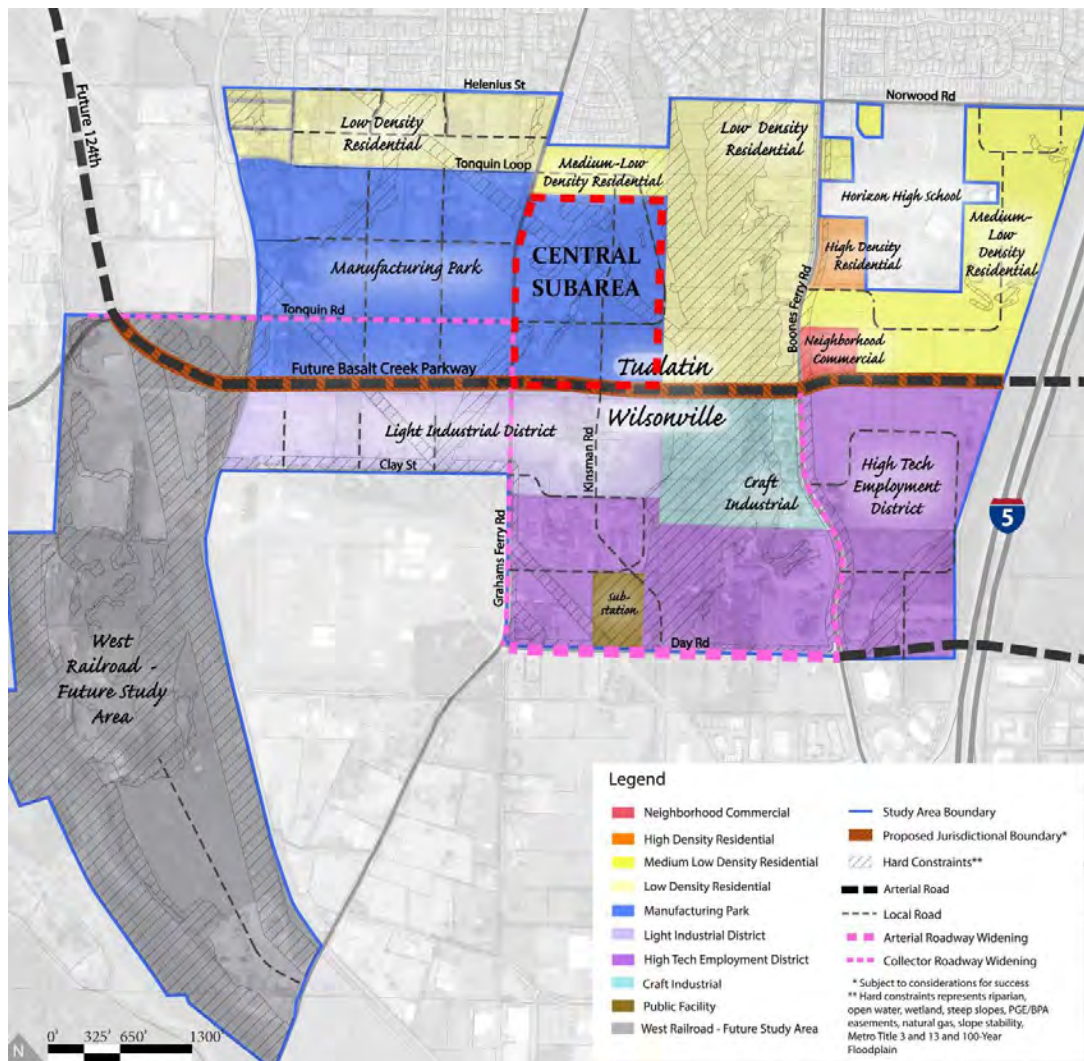


Figure 1: Basalt Creek Land Use Concept Map (Sept. 2016)

EXHIBIT A TO RESOLUTION 18-4885

A. Process

In 2017 the cities of Wilsonville and Tualatin reached an impasse regarding concept planning for a 52-acre portion of the Basalt Creek Planning Area known as the “Central Subarea” and asked Metro to take on the role of arbitrating their dispute. To that end, the cities, Metro, and Washington County entered into an IGA in January of 2018 that assigns Metro the task of making a final and non-appealable decision regarding the appropriate land use designation for the Central Subarea. The IGA is attached as Exhibit A and provides:

“Metro will have sole discretion to determine what to call this decision making process, where and when to hold the process, who Metro will appoint to make the decision, a briefing schedule, whether or not to hear oral argument, and ground rules that must be adhered to by the cities and county throughout the process.”

The process created by Metro began with the issuance of a staff report to the COO on February 21, 2018, which recommended an employment designation. The cities and the county then had until March 7, 2018 to submit written argument and evidence in support of their positions. The cities and county were provided an additional seven days to submit arguments and evidence in rebuttal to the first round of materials.

In addition to the materials submitted by the cities, Metro received a letter from the Chair of the Washington County Board of Commissioners in support of retaining the employment designation and stating concerns regarding Tualatin’s proposal to add more residential land in an area that has long been planned for industrial and employment use. Metro also received submittals from Herb Koss and Peter Watts, who own property within the Central Subarea and are advocating for a residential designation. Those two submittals include materials that had been provided to the two cities during the concept planning process.

After reviewing all of the documents provided by the parties and relevant regional planning materials, it is my conclusion that an employment designation for the Central Subarea is: (1) more consistent with the planning goals and expectations of the local government stakeholders over the last 14 years; and (2) supported by the greater weight of evidence in the record.

The Metro process calls for the Metro Council to review this recommendation and deliberate to a decision regarding whether to accept, reject, or modify it. The Council’s

EXHIBIT A TO RESOLUTION 18-4885

review will be based on the record of written materials submitted by the cities, county, and Metro staff. The Council will then adopt a resolution memorializing its decision and directing the cities to prepare concept plans consistent with Metro's final decision and with Title 11 of the Urban Growth Management Functional Plan. In the IGA, the cities agree that they will accept Metro's final decision and adopt corresponding concept plans.

B. Basalt Creek Planning History

1. 2004 UGB Expansion

The Basalt Creek Planning Area was added to the UGB as part of a 2004 expansion for industrial and employment purposes. Metro had previously expanded the UGB in 2002 to add 17,458 acres of land, with 15,047 acres added for residential purposes and 2,411 acres for employment. In the 2002 decision, Metro acknowledged that the amount of land being added for employment purposes was not sufficient to meet the identified 20-year need, and therefore requested that the Land Conservation and Development Commission (LCDC) assign a new work task that would allow Metro to complete its work and accommodate the region's need for industrial land. *See* Exhibit P to Metro Ordinance 02-969B. LCDC approved the majority of the decision, and returned the matter to Metro with instructions to satisfy the unmet 20-year need for industrial land.

Metro responded in 2004 by adopting Ordinance No. 04-1040B, the stated purpose of which was "to increase the capacity of the boundary to accommodate growth in industrial employment." That decision expanded the UGB to include 1,940 acres of land for industrial use, including the 646 acres now known as the Basalt Creek Planning Area between the cities of Tualatin and Wilsonville. The Metro Council adopted the following findings in support of adding the Basalt Creek area to the UGB:

"The Council chose this area because it is exception land (rural residential and rural industrial) with characteristics that make it suitable for industrial use. It lies within two miles of the I-5 corridor and within one mile of an existing industrial area, and portions of the area are relatively flat. These characteristics render it the most suitable exception area under consideration for warehousing and distribution, a significant industrial need facing the region." Metro Ordinance 04-1040B at Exhibit G, page 17.

During the Metro proceedings, the City of Tualatin and some of its residents expressed concerns about compatibility between future industrial uses in the Basalt Creek area and residential neighborhoods at the south end of the city, and about preserving the opportunity to choose an alignment between Tualatin and Wilsonville for the then-

EXHIBIT A TO RESOLUTION 18-4885

planned connector between Interstate 5 and Highway 99W. In response, the Metro Council adopted the following condition of approval:

“2. Title 11 planning shall incorporate the general location of the projected right of way alignment for the I-5/99W connector and the Tonquin Trail as shown on the 2004 Regional Transportation Plan. If the selected right-of-way for the connector follows the approximate course of the ‘south alignment,’ as shown on the Region 2040 Growth Concept Map, ... the portion of the Tualatin Area that lies north of the right-of-way shall be designated ‘Outer Neighborhood’ on the Growth Concept Map; the portion that lies south shall be designated ‘Industrial.’” Metro Ordinance 04-1040B at Exhibit F, page 3.

A copy of the 2004 version of the 2040 Growth Concept Map showing the two proposed alignments for the I-5/99W connector is attached as Exhibit B. That exhibit also shows the locations of the Central Subarea and the Basalt Creek Parkway. The Metro Council adopted the following findings describing the purpose of the condition:

“Second, the Council states that, so long as the alignment for the Connector falls close to the South Alignment shown on the 2040 Growth Concept Map, it will serve as the buffer between residential development to the north (the portion least suitable for industrial uses) and industrial development to the south (the portion of the area most suitable for industrial use).” Metro Ordinance 04-1040B at Exhibit G, pages 17-18.

2. Local Concept Planning

In 2007, Metro awarded a \$365,000 CET Grant to the cities of Tualatin and Wilsonville to perform concept planning for the Basalt Creek Planning Area. In 2011 the cities, Metro, and Washington County entered into an IGA that outlines the requirements and responsibilities of the parties regarding their coordinated efforts on the Basalt Creek concept plan. The IGA defines a decision-making process that requires all four parties to agree to the final decisions about the jurisdictional boundary between the two cities and the appropriate land use designations for the entire area.

The concept plan was put on hiatus from 2011 to 2013 while transportation planning issues for the larger South County Industrial Area were being resolved via the Basalt Creek Transportation Refinement Plan. The stakeholders concluded that it was important to address transportation issues for the area prior to any industrial development occurring. As part of that transportation planning effort, the Basalt Creek Parkway was one of several options identified as critical to the success of the transportation system. The

EXHIBIT A TO RESOLUTION 18-4885

Parkway was seen as one of the vital connectors for truck traffic from the Tonquin and Southwest Tualatin Industrial areas to the north down to Interstate 5, in order to mitigate the traffic impacts on Tualatin-Sherwood Road and the Tualatin Town Center.

Upon completion of the Basalt Creek Transportation Refinement Plan in 2013, the cities of Wilsonville and Tualatin resumed their concept planning efforts, utilizing Metro's CET grant funds. In December of 2015, the City Councils of Wilsonville and Tualatin reached an agreement regarding a jurisdictional boundary between the cities, delineated by the Basalt Creek Parkway. Further work between the cities resulted in a "Preferred Basalt Creek Land Use Map" in September of 2016, which designated the majority of the area north of the Basalt Creek Parkway in Tualatin, including the Central Subarea, with a Manufacturing Park zoning classification. Exhibit C.

3. Summary of Dispute

In October of 2016, a property owner in the Central Subarea presented the City of Tualatin with a proposal to change the designation of the subarea from employment to residential. The property owner asserted that the area is not well suited for employment uses due to topography and geologic conditions. In support of this proposal, the property owner submitted a request from OTAK to amend the Preferred Basalt Creek Land Use Map, stating a concern that the Central Subarea would be difficult to develop for employment purposes due in part to the existence of slopes in excess of ten percent. The property owner also submitted letters from other development professionals stating that the site topography is too challenging for industrial development and is better suited for smaller footprint buildings such as housing. Tualatin Brief, Exhibit 108.

At a Tualatin City Council work session on October 10, 2016, the City Council directed planning staff to consider the property owner's request as proposed by OTAK. The matter came back to the City Council on November 28, 2016. The Tualatin planning department staff report for that meeting noted that the OTAK proposal to amend the concept plan "includes substantially more residential land uses in the central subarea" than had been previously discussed, and recommended rejecting the property owner's proposal and retaining the proposed employment designation: "After consideration of OTAK's proposal and all of the above factors together, staff believes the central subarea can be developed for employment over the long-term. While there are some hilly areas, the Manufacturing Park designation can be made flexible enough to include some smaller scale employment uses." Wilsonville Rebuttal Brief, Exhibit G.

EXHIBIT A TO RESOLUTION 18-4885

In response to the property owner's testimony to the City of Tualatin in October of 2016 regarding the unsuitability of the Central Subarea for employment uses, Washington County hired Mackenzie development group to undertake an independent study regarding the viability of employment uses in that area. The study was completed in January of 2017 and concluded that employment uses are viable in the Central Subarea, specifically for flex business park, office campus, manufacturing, and commercial support services. Wilsonville Brief, Exhibit G.

In February of 2017, the Tualatin City Council directed their staff to proceed with changing the designation of the Central Subarea from employment to residential. In March of 2017, the City of Wilsonville hired the engineering firm KPFF to evaluate the feasibility of development for employment uses in the Central Subarea. The resulting KPFF feasibility study provided three different scenarios for viable employment development, taking into consideration the slope and geologic composition of the site. Wilsonville Brief, Exhibit D.

Under the 2011 IGA regarding concept planning for the Basalt Creek Planning Area, all parties must agree regarding the jurisdictional boundary between the cities and the land use designations. Since the cities cannot agree, the area cannot be planned or annexed by either city. The cities asked Metro to act as an arbitrator and resolve the dispute.

ANALYSIS

A. Planning Goals and Expectations of Local Government Stakeholders

The planning history of the Central Subarea and the planning expectations of local government stakeholders lean heavily in the direction of an employment designation. The area was brought into the UGB by Metro in 2004 as part of an expansion for the purpose of meeting a regional need for industrial land, and the entire Basalt Creek Planning Area is designated on Metro's Title 4 map as a future industrial area.

Although the 2004 UGB expansion decision did contemplate that some portions of the Basalt Creek Planning Area could become residential, the relevant condition of approval and findings (quoted above on page 3) drew a line at the location of the south alignment of the proposed I-5/99W connector and stated that areas north of that line, closer to the City of Tualatin boundary, are more appropriate for residential use, while areas south of that line (including the Central Subarea) are more appropriate for industrial use.

As noted by the City of Wilsonville in its brief, the City of Tualatin has already designated a substantial portion of its share of the 2004 UGB expansion area for

EXHIBIT A TO RESOLUTION 18-4885

residential development. Without removing the employment designation from the Central Subarea, 91 the 194 developable acres in Tualatin's portion of the Basalt Creek Planning Area are designated as residential. Those 91 acres include flat land adjacent to Interstate 5 at the eastern edge of the planning area between Norwood Road and the future Basalt Creek Parkway that appear to be ideal for employment purposes. Wilsonville Brief, Exhibit A. If the Central Subarea designation is changed from employment to residential, Tualatin will have designated 65% of its developable land in the planning area for residential purposes.

Evidence in the record indicates that the City of Tualatin strongly advocated for an employment designation in the Central Subarea during the concept planning process until the end of 2016, when the property owner and OTAK proposed the change to residential. Wilsonville Brief, Exhibit A and Exhibit C at page 6; Wilsonville Rebuttal Brief, Exhibit I. Evidence in the record also shows that the City of Tualatin moved the proposed jurisdictional boundary between the cities farther south in order to provide more employment opportunities for Tualatin. Minutes from the Tualatin City Council work session on August 24, 2015 state:

“Mayor Ogden stated he did not believe the mix of residential and industrial in this option [boundary option 3] is a good value for the people who live in Tualatin. This mix creates more trips in turn creating more congestion. He understands the need for residential capacity but does not believe it should be done at the exclusivity of other options. His recommendation would be to move the boundary line further down to accommodate for job producing land options creating a more balanced growth option.

“Council Bubenik would like to see more land in this option converted to light industrial.

“Council President Beikman expressed dissatisfaction with boundary option three. She stated boundary option three removes all industrial land and converts it to residential leaving no room for job growth.” Wilsonville Rebuttal Brief, Exhibit A.

As a result of this direction from the Tualatin City Council regarding the city's desire for more employment land, Tualatin planning staff generated a new Boundary Option 4, which moved the boundary between the two cities south to Tonquin Road and changed the designation of the Tualatin portion of the Central Subarea from residential to

EXHIBIT A TO RESOLUTION 18-4885

employment. Wilsonville Rebuttal Brief, Exhibit C. Planning staff then presented Boundary Option 4 at the joint meeting between the two city councils on December 16, 2015. Wilsonville Rebuttal Brief, Exhibit D.

At the December 16, 2015 meeting, the two city councils agreed that the boundary line between the two cities should be moved even farther south, to the future location of the Basalt Creek Parkway. Tualatin Reply Brief, Exhibit 128. The City of Wilsonville argues that there was an express agreement between the cities at the December 16, 2015 joint meeting regarding an employment designation for the Central Subarea. The City of Tualatin disagrees, noting that the stated purpose and outcome of the meeting was limited to the agreement regarding the location of the jurisdictional boundary, and that future land use designations were not included as part of the presentation to the two city councils. Tualatin Reply Brief, Exhibits 128, 129 and 130.

The City of Tualatin appears to be correct that there was no formal agreement or vote taken by the two cities at the December 16, 2015 joint meeting regarding land use designations. However, the evidence, and common sense, support the City of Wilsonville's contention that its agreement regarding the jurisdictional boundary was based in part on the Tualatin City Council's position regarding Tualatin's need for more employment land, and that Wilsonville would not have agreed to cede more land to Tualatin if it was proposed to be residential.

There is no dispute that the Tualatin City Council directed its staff to move the city boundary south to Tonquin Road because it believed Tualatin was not being provided enough employment land for future job growth in the city. That directive resulted in Boundary Option 4, which changed the Tualatin portion of the Central Subarea from residential to employment. At the same December 16, 2015 joint meeting where Tualatin's Boundary Option 4 was presented to the two city councils, the councils reached agreement on a boundary location even farther south, at the Basalt Creek Parkway. Given Tualatin's push to move the boundary south in order to provide itself with more employment land, there was no reason for Wilsonville to think that Tualatin was going to change its proposed employment designation for the Central Subarea to residential. Although there was no vote or other formal action taken at the December 16, 2015 joint meeting regarding land use designations, the evidence supports a finding that Wilsonville's agreement regarding the jurisdictional boundary was premised on its belief that areas north of that boundary would remain in an employment designation as proposed by Tualatin on December 16, 2015. As stated by Wilsonville Mayor Tim Knapp at a city council work session on March 20, 2017, "Our prior offer to set the boundary at the parkway is contingent on the rest of that agreement that has, apparently, disappeared.

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So the proposal to put the boundary at the parkway is no longer operative.” Wilsonville Rebuttal Brief, Exhibit I, page 2.

Since 2016, Washington County has objected to changing the employment designation based on the county’s planning expectations and related transportation investments in the Basalt Creek Planning Area. The March 5, 2017 submittal from the Chair of the Washington County Commission states:

“Our position remains consistent with my letter to Mayor Ogden and members of the Tualatin City Council dated October 27, 2016, wherein I expressed the concerns of the Board of County Commissioners regarding potential increases in the amount of residential units proposed in the Tualatin side of the Basalt Creek Concept Plan. The County supports the planned employment uses in this area and has invested over \$65 million in the construction of the new 124th arterial to leverage future economic development in the area.”

A copy of the county’s October 27, 2016 letter is attached as Exhibit D. That letter provides, in relevant part:

“We believe this area to be prime future industrial land needed to support the regional economy. In 2013, Washington County, City of Tualatin, City of Wilsonville, and Metro acknowledged the Basalt Creek Transportation Refinement Plan. This plan identified transportation infrastructure needed to support this future industrial area. We have moved forward in support of this agreement with construction of the new 124th arterial to leverage future economic development. We believe that eliminating industrial land beyond what the latest concepts show would be a big mistake for the economic health of South County and counter to our agreement.”

The Basalt Creek Transportation Refinement Plan Recommendations from 2013, attached as Exhibit E, supports the assertion of Washington County that an important function of the planned Basalt Creek Parkway (also referred to as the SW 124th arterial) is “supporting industrial access from the Tonquin, Southwest Tualatin, and Basalt Creek Planning Areas.” Exhibit E, page 2. This planning objective is also reflected in Metro’s 2014 Regional Transportation Plan (RTP), which describes the recommended alternative to the I-5/99W connector proposal as follows:

“The recommended alternative ... is based upon the principle that it is preferable to spread the traffic across three smaller arterials rather than one

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large expressway. The analysis concluded this approach could effectively serve the traffic demand, would provide better service to urban land uses in the Tualatin/Sherwood area, especially industrial lands, and could be built incrementally based upon need to serve growth and revenue availability.”

“* * * * *

“Since completion of the I-5/99W Connector Study, Washington County led the Basalt Creek Transportation Refinement Plan along with Metro, ODOT, and the Cities of Tualatin and Wilsonville. The purpose of this refinement plan was to determine the major transportation system to serve the Basalt Creek Planning Area. The plan sets the stage for land use concept planning and comprehensive plan development for the Basalt Creek area. The need to plan for the future transportation system was driven by future growth in the Basalt Creek area itself as well as almost 1000 acres of future industrial development targeted for surrounding areas.” 2014 RTP, pages 5-21 and 5-22.

The relevant transportation planning documents for the Basalt Creek Planning Area indicate that one reason for abandoning the I-5/99W connector proposal was to create a better plan for transportation connectivity for planned industrial development in the area. As noted by Washington County in its March 5, 2017 letter, a primary purpose of the \$65 million investment in the planning and development of the Basalt Creek Parkway is to support future economic development from planned employment areas in the Basalt Creek Planning Area. The City of Tualatin’s decision to add more residential land to the sizeable areas it has already planned for residential is not consistent with the county’s planning expectations and investment in the Basalt Creek Parkway arising out of the agreement reached by the local governments in the Basalt Creek Transportation Refinement Plan.

B. Consideration of the Cities’ Arguments

1. Consistency with Condition of Approval on 2004 UGB Expansion

The City of Tualatin contends that the Central Subarea must be designated for residential purposes under the condition of approval attached to the 2004 UGB expansion in Metro Ordinance 04-1040B. Tualatin asserts this is because the condition requires all areas north of the Basalt Creek Parkway to be designated “Outer Neighborhood.” However, the condition refers to the south alignment of the proposed I-5/99W connector and not to the Basalt Creek Parkway:

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“2. Title 11 planning shall incorporate the general location of the projected right of way alignment for the I-5/99W connector and the Tonquin Trail as shown on the 2004 Regional Transportation Plan. If the selected right-of-way for the connector follows the approximate course of the ‘south alignment,’ as shown on the Region 2040 Growth Concept Map, as amended by the portion of the Tualatin Area that lies north of the right-of-way shall be designated ‘Outer Neighborhood’ on the Growth Concept Map; the portion that lies south shall be designated ‘Industrial.’” Metro Ordinance 04-1040B at Exhibit F, page 3.

The map below (also attached as Exhibit B) shows the location of the Central Subarea and the Basalt Creek Parkway overlaid on the 2040 Growth Concept Map from 2004 with the proposed north and south alignments for the I-5/99W connector. As shown on this map, the south alignment is located along the northern boundary of the Central Subarea.

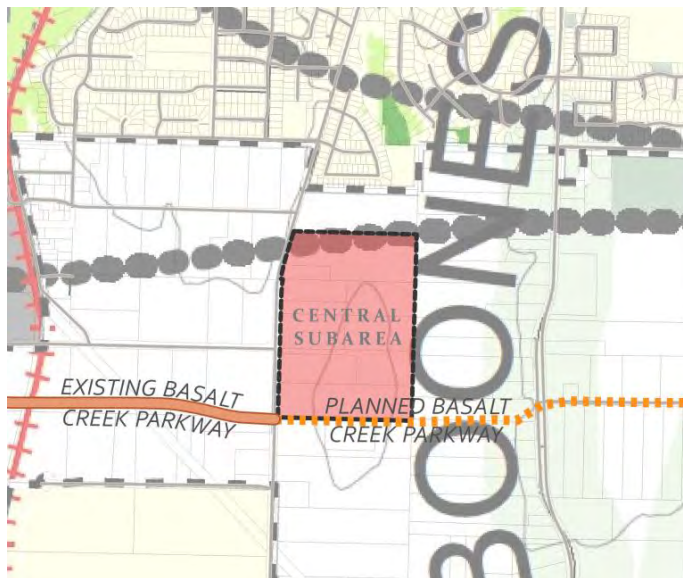


Figure 2: Central Subarea and Basalt Creek Parkway overlaid on Metro 2040 Growth Concept Map (2004 version)

In reviewing the cities’ arguments on this issue, it is important to note that the I-5/99W connector concept was abandoned by the stakeholders in favor of spreading traffic across three smaller arterials. Therefore the two alternative connector alignments have been removed from the current 2040 Growth Concept Map. As a result, the significance of this condition of approval is limited, since the proposed connector will never exist. Tualatin contends that the Basalt Creek Parkway should be treated as if it were the connector because it “follows the approximate course” of the south alignment, consistent with the condition of approval. Therefore, Tualatin argues, the Parkway must serve as the buffer

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between industrial development to the south and residential to the north, as stated in the Metro Council findings explaining the condition of approval:

“Second, the Council states that, so long as the alignment for the Connector falls close to the South Alignment shown on the 2040 Growth Concept Map, it will serve as the buffer between residential development to the north (the portion least suitable for industrial uses) and industrial development to the south (the portion of the area most suitable for industrial use).” Metro Ordinance 04-1040B at Exhibit G, pages 17-18.

However, the Basalt Creek Parkway and the previously proposed I-5/99W connector are not interchangeable facilities. As stated in the above-quoted portion of the 2014 RTP, the recommended alternative to the I-5/99W connector “is based on the principle that it is preferable to spread the traffic across three smaller arterials rather than one large expressway.” 2014 RTP, page 5-21.

More importantly, the location of the Basalt Creek Parkway is sufficiently south of the proposed connector’s south alignment that it cannot reasonably be considered the “approximate course” of that alignment. Tualatin argues that the distance is only approximately 1800 feet, or one-third of a mile. However, shifting the entire length of a proposed roadway project by one-third of a mile is not an insignificant change. Also, as pointed out by Wilsonville in its brief, the amount of acreage that would be changed from industrial to residential as a result of shifting the alignment that far south is significant – the residential acreage would increase from 110 acres to 380 acres. Wilsonville Rebuttal Brief at Exhibit F, page 2.

This highlights a flaw in Tualatin’s argument – if the condition of approval still applies as the city contends, and is interpreted so that the Basalt Creek Parkway is the equivalent of the I-5/99W connector and therefore must separate industrial uses to the south and residential to the north, then 100% of the approximately 200 acres of employment land in Tualatin’s portion of the planning area would need to be converted to residential. Wilsonville Rebuttal Brief at Exhibit H. This is an outcome that has never been contemplated by any party to this decade-long planning process, and would create further obstacles and disputes among the cities, county, and Metro regarding planning for the Basalt Creek area.

The part of the Metro Council’s 2004 UGB expansion findings regarding the location of the proposed south alignment that is more relevant today is that the Council identified the area north of the proposed alignment as being the least suitable for industrial use, and the

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area to the south as being the most suitable for industrial use. As shown on the map above (and attached as Exhibit B), the location of that proposed alignment follows the northern boundary of the Central Subarea.

In conclusion, the 2004 condition of approval does not support Tualatin's argument that the Central Subarea must be designated for housing. However, the 2004 Metro Council findings do indicate that Metro's UGB expansion decision identified the area south of the proposed I-5/99W connector, including the Central Subarea, as "the area most suitable for industrial use."

2. Suitability for Industrial/Employment Development

The primary reason stated by the City of Tualatin for changing the Central Subarea planning designation from employment to residential was that the area is too steep and too rocky to be developable for employment purposes. This issue was initially raised in testimony from a property owner in the Central Subarea, who hired OTAK to prepare and submit a request for an amendment to the concept plan that provides a bullet-point list of concerns, along with a slope analysis and a proposal for residential development in the subarea. The three concerns identified in the OTAK document are topography, access, and the fact that the subarea abuts the Basalt Creek Canyon. Tualatin Exhibit 108.

The property owner also submitted four one-page letters from development professionals at Brian Copton Excavating, Real Estate Investment Group, PacTrust, and Ken Leahy Construction stating that development of the Central Subarea for employment purposes would be "very difficult," "very inefficient," "uneconomic," and that the area is generally better suited for residential use due to its topography, rockiness, and access limitations. Wilsonville Brief, Exhibit H.

In response to this testimony, Washington County hired Mackenzie development group to undertake a study regarding the viability of employment uses in the Central Subarea. The study was completed in January of 2017 and provides a slopes map, an estimation of development area acreage for employment purposes, and a conceptual employment use concept plan. The Mackenzie report acknowledges that there are development constraints on the site, noting that nearly a third of the site consists of slopes greater than 10%, which are generally considered undevelopable for employment purposes. The report states that "of the 63 gross acres, approximately half of the site (about 37 acres) may be suitable for employment development, if slopes ranging above 5% to 10% can be mitigated." Wilsonville Brief Exhibit G, page 3. The report provides an employment use concept plan showing 40% developable area and approximately 315,000 square feet of building

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area, and goes on to conclude that employment uses are viable in the Central Subarea, specifically for flex business park, office campus, manufacturing, and commercial support services.

The Mackenzie report includes two incorrect assumptions that undercut the evidentiary value of the report's concept plan and conclusions. First, Mackenzie mistakenly included the 11-acre property to the north of the Central Subarea as part of its study, and located two buildings and an access road in that location in its concept plan. That property has been agreed upon as a future residential area and is not part of the dispute between the cities. It also includes some of the flattest terrain in the area, so its inclusion in the Mackenzie study skews the conclusions regarding total developable area. Second, the Mackenzie concept plan shows a public road access point onto the Basalt Creek Parkway, which is not correct due to the limited access nature of that facility. However, the Mackenzie report does have evidentiary value in that it describes land suitability factors for employment development, identifies the locations of the best developable areas within the Central Subarea for employment purposes, and identifies types of employment uses that could be located in those areas.

After the Tualatin City Council directed staff to change the designation of the Central Subarea from employment to residential in February of 2017, the City of Wilsonville hired the engineering firm KPFF to undertake a study evaluating the feasibility of development for employment uses in the Central Subarea. The KPFF study provides a comprehensive evaluation of the site, including environmental constraints, slopes, rock location and excavation, grading, and site access. Based on that evaluation, the KPFF study identifies three different "schemes" for employment development of the Central Subarea. The three schemes offer differing intensities of development, based in part on the level of desired protection of open space areas in the northern portion of the site. Scheme A shows a total building area of 480,000 square feet, Scheme B shows a total building area of 594,800 square feet, and Scheme C shows a total building area of 781,350 square feet. The KPFF study concludes as follows:

"Various employment opportunities can be accommodated on the site from larger industrial facilities such as Building A to smaller craft industrial facilities such as Building E. The slope on the site is conducive to the stepped and smaller buildings such as Buildings E and C. These buildings could provide office space as well as smaller craft facilities that can include breweries, textiles, pottery and metal works. Not only will these facilities increase the employment opportunities in the area but they also fill a need for providing space to support local artists and craft industry. As indicated

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in the three schemes there is flexibility on the site to use a variety of building types and footprints. This feasibility study has validated through the test fits that the area can be developed to increase employment opportunities in the region. As a result, other land uses were not analyzed for feasibility since the area is designated as a regional employment area.”

“The site does pose some grading challenges which will require the use of stepped foundations and retaining walls as indicated and discussed. This is not unexpected in the region and the use of retaining walls and stepped footings has been done in other projects locally as indicated by the included images. The cost for accommodating the grade changes is higher than if the project site were completely flat, but it is not out of line with development on similar types of sites. Infrastructure costs such as construction of new roadway and utilities are required for all greenfield sites and would be required to develop the feasibility study site regardless of the intended use.”
Wilsonville Brief, Exhibit D, page 28.

Metro is presented with a situation where there is conflicting evidence in the record regarding the viability of employment uses in the Central Subarea. Metro’s decision on this issue must be based on substantial evidence in the record, which is legally defined as evidence a reasonable person would rely on in making a decision. In reaching that decision, Metro may consider the weight and credibility of the relevant conflicting evidence and decide which evidence it finds to be more persuasive in reaching its decision.

After reviewing all of the relevant evidence in the record, and evaluating its comparative weight and credibility, the greater weight of more credible evidence supports a conclusion that it is feasible to develop the Central Subarea for employment purposes. The evidence indicates that, although the Central Subarea may not be a likely candidate for a large industrial facility, there is sufficient developable area on the site for multiple buildings housing smaller employment uses, as depicted in the Mackenzie and KPFF studies, such as office, flex business park, manufacturing, and craft industrial.

The best evidence in the record regarding the viability of employment uses in the Central Subarea is the KPFF study, which provides an independent and highly credible professional analysis of potential employment uses on the site, and concludes that although there will be some challenges and costs associated with grading and excavation that would not exist if the site were totally flat, those costs are “not out of line with development on similar types of sites.” Wilsonville Brief, Exhibit D, page 28. The KPFF

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study also provides photo examples of other projects in the Metro region where grading and retaining walls have been used to allow employment development in similarly sloped areas.

The property owner advocating for a residential designation has not provided a similarly thorough and independent professional study of the site. The OTAK materials provide topographic and slope maps that appear identical to those provided by Mackenzie and KPFF, and state the uncontested fact that the site contains slopes in excess of 10% and 25% that are unlikely to be developable. However, as noted in the Mackenzie study, those portions of the Central Subarea that contain slopes of less than 5% may be readily developed, as well as those areas between 5% and 10% with more significant grading. OTAK expressly agreed with this aspect of the Mackenzie analysis. Wilsonville Brief, Exhibit H, item #9. The Mackenzie and KPFF studies each show those locations where employment-related buildings may be developed, including areas with slopes up to 10%. The OTAK memorandum goes on to make two inconclusive statements regarding access and the presence of the Basalt Creek Canyon, which have little evidentiary value. Tualatin Brief, Exhibit 108.

The record includes four one-page letters from individuals in the construction and real estate professions, written at the request of the property owner, generally stating their opinions that the Central Subarea is not well suited for employment uses due to topography, rockiness, and limited access. None of these letters include or reference the type of detailed and site-specific evidence provided in the analysis undertaken by KPFF. Two of the letters state that large industrial or flex buildings would not be viable due to the size of their footprints, but do not appear to consider the types of smaller employment uses identified by KPFF and Mackenzie. The common theme of the letters is that development of the site for employment purposes will be expensive due to grading and excavation costs, followed by conclusions that those higher costs will make future development “inefficient” or “uneconomic,” but providing little or no direct evidence supporting those opinions.

Taking a step back, the question properly before the cities, and now Metro, is a *planning* question regarding what would be the best type of use in this particular location in the future, given the long-range plan for the area. The question is not whether the Central Subarea will be developed tomorrow, or even in the next three years, for employment purposes. Accordingly, testimony that raises potential concerns about site-specific development issues, and particularly economic feasibility, is necessarily less relevant in reaching a determination as to whether an employment designation is appropriate. In reaching a decision regarding a land use planning designation for future development, a

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local government is not required to demonstrate that there is a particular development plan for the property that could occur immediately.

The KPFF study demonstrates that it is feasible for the Central Subarea to be developed for employment uses. The study acknowledges that it will be more challenging (and expensive) than if the area were flat, but states that the resulting costs are not out of line with existing development on similar sites. As noted by the City of Wilsonville in its brief, employment properties in the region that are easy to develop have largely been developed already, requiring developers and local governments to become more innovative and flexible regarding the siting of employment uses. The importance of local government flexibility was recognized by City of Tualatin planning staff when it concluded that the Central Subarea could be developed for employment uses: “While there are some hilly areas, the Manufacturing Park designation can be made flexible enough to include some smaller scale employment uses.” Wilsonville Rebuttal Brief, Exhibit G,

The property owner also submitted three letters from engineering and planning firm CES/NW that are of higher evidentiary value than the other materials relied upon by the City of Tualatin, in that the CES materials include a more objective and evidence-based analysis than letters that primarily state opinion-based conclusions. The first letter, dated February 10, 2017, raises similar issues regarding slopes and access points; however, it is primarily aimed at critiquing the Mackenzie concept plan, which as acknowledged above includes incorrect assumptions regarding access and developable acreage. Those errors are correctly pointed out in the CES letter.

Since the flaws in the Mackenzie plan are now known, and it has been essentially superseded by the more detailed (and accurate) KPFF study, the subsequent CES letter dated May 18, 2017 is more relevant because it provides a direct review of the KPFF study and conceptual development plan. The letter from CES focuses on the preferred Scheme B and makes an estimate regarding the amount of grading that would be required and the associated costs of that grading plus necessary retaining walls. Significantly, one conclusion of the CES letter is that “we feel the proposed grading plan is possible.” Tualatin Brief, Exhibit 113. Thus, the consultants hired by the property owner admit that it is *possible* for the Central Subarea to be graded for employment use. The issue posed by CES is not physical feasibility; it is how much it would cost. The CES letter estimates \$10.5 million for grading and \$1.2 million for retaining walls. However, the letter does not provide any evidence or conclusions regarding whether or why those expenses would render development of the site economically infeasible. This letter has evidentiary value

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for the amount of money that could be required to grade the site, but not for a conclusion that grading costs would render development economically infeasible.

The question of economic feasibility is more directly addressed in the next letter from CES, dated July 20, 2017, the primary point of which is to compare residential development to employment development in the Central Subarea given its site constraints. But again, that letter stops short of saying that employment development is not feasible: “Add rock excavation at six to ten times the normal cost of grading to the excessive amount of grading required, and this property *may not be* economically feasible to develop.” Tualatin Brief, Exhibit 114 (emphasis added). This letter provides evidentiary support for the proposition that it will be more expensive to develop the Central Subarea for employment than residential, and that excavation and grading costs *could* make it economically infeasible. But it does not directly support the conclusion asserted by the City of Tualatin that developing the site for employment use “is not economically feasible.” Tualatin Brief, page 6.

In its brief, the City of Tualatin also challenges certain assumptions and conclusions in the KPFF study. Tualatin notes that all three potential development schemes depicted in the KPFF study “have office space as the predominant use, not industrial.” Tualatin Brief, page 11. Office space is an employment use and the debate here is about whether the site is appropriate for employment purposes, which of course could include industrial but are not limited to industrial. Tualatin also argues that the KPFF study concludes that “the area is useful, at best, for ‘split elevation’ office use.” Tualatin Brief, page 5. The City of Wilsonville provided the following response from KPFF engineer Matt Dolan, which more accurately describes the study’s conclusions: “To the contrary, the study suggests that a different building type could be utilized in areas with steeper slopes and does not suggest this approach for the entire area. All of the scenarios and building typologies imagined in the study support employment opportunities within the study area....” Wilsonville Rebuttal Brief, Exhibit K.

Tualatin also notes that the office buildings include “split elevations and access at varying levels to accommodate grade,” and then asserts “[a]s explained by an industrial/employment developer, stepped floors are not desired for industrial/employment development,” citing the PacTrust letter dated November 14, 2016. However, the PacTrust letter does not say anything about stepped floors being undesirable for employment development. The conclusion of the PacTrust letter is that “the topography of your site makes development of industrial or flex buildings uneconomic.” Tualatin Brief, Exhibit 115. Notably, the PacTrust letter does not say that the site topography

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renders development infeasible for other smaller employment uses, such as the office or craft industrial buildings that are included in the KPFF development schemes.

Tualatin also contends that the KPFF proposed development schemes do not comply with Oregon Fire Code requirements regarding the allowable grade of an access road and a need for secondary access to the southern development area. These issues are adequately addressed in the response from the KPFF engineer, who notes that applicable TVFR requirements allow grades up to 15%, and that whether and where secondary access will be provided would be determined in consultation with TVFR at the time development is actually proposed. The KPFF memo also includes the following assessment:

“The discussion regarding economic feasibility does not seem pertinent or relevant to the determination of the long range planning goals for the area. If they are to be considered, a much more impartial and holistic approach would need to be applied to some sort of criteria that can equally evaluate long term economics for varying development scenarios. This is well beyond the scope of the feasibility study or any conclusions that could be extrapolated from the report and development scenarios envisioned.”

Wilsonville Rebuttal Brief, Exhibit K.

Tualatin also argues that the KPFF study is “biased” because KPFF purposely ignored the possibility of residential development on the site, and only studied the possibility of employment uses. Tualatin Reply Brief at 6. This argument ignores the statement on the first page of the KPFF report that the purpose of the study is to “ascertain whether the policy objective of employment uses is achievable in this subarea. Only if this investigation determines employment uses not to be feasible on this site will this analysis then consider feasibility of other land uses.” Wilsonville Brief, Exhibit D, page 1.

After reviewing all of the evidence in the record, and evaluating its comparative weight and credibility, the greater weight of more credible evidence supports a conclusion that it is feasible to develop the Central Subarea for employment purposes. Regarding credibility, this analysis cannot overlook the property owners’ monetary incentive to obtain a residential designation, which is more likely to provide a higher investment return than employment.

The evidence indicates that, although the Central Subarea may not be a likely candidate for a large footprint industrial facility, there is sufficient developable area on the site for multiple buildings housing smaller employment uses, as depicted in the Mackenzie and KPFF studies, such as office, flex business park, manufacturing, and craft industrial. This

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conclusion is supported by the City of Tualatin staff report to the City Council dated November 28, 2016, which concludes: “After consideration of OTAK’s proposal and all of the above factors together, staff believes the central subarea can be developed for employment over the long-term. While there are some hilly areas, the Manufacturing Park designation can be made flexible enough to include some smaller scale employment uses.” Wilsonville Rebuttal Brief, Exhibit G.

3. Responding to the Housing Crisis

The City of Tualatin contends that changing the planning designation for the Central Subarea to housing is an effective response to the regional housing crisis. Tualatin cites Metro materials that identify an urgent need to provide more affordable housing in the region, including the proposed 2018 affordable housing bond.

The Metro materials relied upon by the city describe an urgent need to address the current shortage of affordable housing in the region. As correctly noted by the City of Wilsonville, there is no evidence to support a conclusion that new homes constructed in the Central Subarea would fit any traditional definition of “affordability.”

More importantly, zoning the Central Subarea for residential use also would not address an immediate need for any type of housing. New residential development in this type of greenfield area takes a very long time, due in part to the need to plan, finance and construct all of the necessary infrastructure. Areas in Washington County that were added to the UGB in 2002 have only recently begun to actually be developed with housing. The long timelines associated with greenfield development do not lend themselves to addressing short-term housing needs. That will require development in existing urban areas that are already served by infrastructure.

Tualatin asserts that it has a shortage of land available for housing, based on its number of estimated dwelling units in Metro’s 2015 Buildable Land Inventory (BLI). However, the BLI is an inventory, not a housing needs analysis. In the absence of any information regarding the city’s projected population growth and corresponding future housing needs, an inventory does not support a conclusion that there is a need for housing. Tualatin’s brief does not refer to a local housing needs analysis under Goal 10, and it is not clear if the city has a current acknowledged housing needs analysis.

Tualatin’s argument that adding housing in the Central Subarea is necessary in order to provide housing for workers in the Basalt Creek area is unsubstantiated. Data gathered by Metro regarding work commutes at the intra-county level suggest that decisions regarding where to live are influenced by many other factors besides proximity to work.

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Exhibit F. Locating housing near an employment area does not guarantee that people will choose to live and work in the same area. Also, the high costs of infrastructure for new residential construction in this greenfield area will likely result in home costs exceeding the available income of most individuals working in nearby industrial jobs.

C. Conclusion

Metro identified the Central Subarea as viable industrial and employment land and included it in the UGB for that purpose. It has a regional Industrial designation under Title 4 of Metro's functional plan. The area is close to Interstate 5, has good existing and planned transportation infrastructure, including the Basalt Creek Parkway, consists of relatively large parcels, and is in close proximity to other areas planned and developed for employment uses. As described above, the weight of more credible evidence in the record supports a conclusion that an employment designation remains appropriate for the Central Subarea, and that the area should be planned accordingly by the cities.

**INTERGOVERNMENTAL AGREEMENT
BETWEEN METRO, WASHINGTON COUNTY, AND THE CITIES OF
TUALATIN AND WILSONVILLE SEEKING A BINDING NON-APPEALABLE
DECISION FROM METRO CONCERNING ONE AREA, THE CENTRAL SUBAREA,
OF THE BASALT CREEK PLANNING AREA**

This Intergovernmental Agreement (IGA) is entered into by the following parties: Metro, a metropolitan service district organized under the laws of the State of Oregon (hereinafter referred to as "Metro"), Washington County, a political subdivision in the State of Oregon (hereinafter referred to as "County"), and the City of Tualatin ("Tualatin") and City of Wilsonville ("Wilsonville"), incorporated municipalities of the State of Oregon (hereinafter referred to as "Cities").

Whereas, in 2004 the Metro Council added two areas, known as the Basalt Creek and West Railroad Planning Areas, located generally between the Cities, to the Urban Growth Boundary (UGB) via Metro Ordinance No. 04-1040B; and

Whereas, Metro conditioned that these UGB expansion areas undergo Title 11 concept planning, as defined in Metro Code Chapter 3.07, cited as the Urban Growth Management Functional Plan (UGMFP); and

Whereas, County and Cities agreed to consider the Basalt Creek and the West Railroad areas in a single concept planning effort and to refer to the two areas generally as the Basalt Creek Planning Area; and

Whereas, located within the Basalt Creek Planning Area is a distinct subarea consisting of the following parcels identified by Washington County tax lot identification: 2S135CB00400, 2S135CB00500, 2S135CC00300, 2S135CC00100, 2S135CC00800, 2S135CC00900, 2S135CC00500, 2S135CC00600, 2S135CC00700, as reflected in Exhibit 1, attached hereto and incorporated by reference herein, which subarea is hereafter referred to as the "Central Subarea"; and

Whereas, in 2011, Metro, County, and Cities entered into an Intergovernmental Agreement (2011 IGA) for concept planning the Basalt Creek Planning Area; and

Whereas, in 2013, Metro, County, and Cities entered into the First Addendum to the 2011 IGA, acknowledging the Basalt Creek Transportation Refinement Plan; and

Whereas, in 2013, Cities began concept planning the Basalt Creek Planning Area; and

Whereas, a disagreement has arisen with respect to what the land use designation should be for the Central Subarea; and

Whereas, Tualatin wants the land use in the Central Subarea to be designated for housing; and

Whereas, Wilsonville wants the land use in the Central Subarea to be designated for employment; and

Whereas, representatives from the Cities jointly met with County representatives in an attempt to identify a process to move forward and complete the Basalt Creek land use Concept Plan map, but were unable to do so; and

Whereas, the governing bodies for the Cities and County agreed to ask Metro to settle the dispute and to make a final, binding, non-appealable decision on the sole issue of designation of the land use for the Central Subarea; and

Whereas, Metro has agreed to accommodate this request, based on the Cities' joint assertion that they cannot agree, with the clear understanding that this is not a role Metro intended, wanted, or asked for itself, but is willing to take on at the request of the Cities and the County;

Now, therefore, incorporating the above Recitals as if fully set forth below, the Cities, County, and Metro agree as follows:

1. FINAL BINDING AND NON-APPEALABLE DECISION BY METRO

Metro will act as the decision-maker to resolve the issue of the land use designation for the area known as the Central Subarea. In that capacity, Metro will have sole discretion to determine what to call this decision making process, where and when to hold the process, who Metro will appoint to make the decision, a briefing schedule, whether or not to hear oral argument, and ground rules that must be adhered to by the Cities and County throughout the process. Metro may require the Cities and County to sign ground rules and decision protocol, as determined solely by Metro. Once designated by Metro, the Parties agree that the Central Subarea will be designated in the final Concept Plans and in the Urban Planning Area Agreement between the Parties, as determined by Metro.

2. CITIES AND COUNTY AGREEMENT


The Cities agree to follow whatever decision-making process and rules are created by Metro, including timelines for submitting evidence and argument. The County may participate and advocate for its preference or may elect to be neutral. Cities and County agree that Metro's decision will be binding and non-appealable by any of them and, once made, all of their respective governing bodies and staff will support the decision to move the Basalt Creek Planning effort to completion without delay and in accordance with the decision of Metro. Each City agrees that it will prepare concept plans for the Basalt Creek Planning Area consistent with Metro's final decision and with Title 11 of Metro's Urban Growth Management Functional Plan. Each City agrees to adopt a resolution accepting the concept plan, reflecting the Metro decision, within 120 days after the date Metro's decision becomes final and effective and finalize their respective comprehensive plans to include that concept plan within one year of the Metro decision. Cities and County further agree that if the designation is appealed by any third party, each will vigorously defend and support the decision and will not support or assist in the

decision and will not support or assist in the appeal of the designation determined by Metro through this process. At the conclusion of Metro's decision, a binding agreement will be signed by all Parties to this effect, with any future disputes or violations with respect to the agreement to be resolved in accordance with the specified requirements of that binding decision. Hereafter the Parties will work in good faith to reach agreement on all other issues so that the final Concept Plans and Urban Planning Area Agreement can be finalized.

This Agreement is effective the 22nd day of January, 2018.

Exhibit 1 – Map

CITY OF WILSONVILLE, OREGON

By: 
Tim Knapp
As Its: Mayor

Date: 12/27/2017

ATTEST:

By: 

[Signatures continue on following pages]

CITY OF TUALATIN, OREGON

By: 

Lou Ogden

As Its: Mayor

Date: 12-11-2017

ATTEST:

By: 

[Signatures continue on following pages]

WASHINGTON COUNTY, OREGON

By: Andy Duyck
Andy Duyck
As Its: Chair, Board of County Commissioners
Date: 1-4-2018


ATTEST:

By: A. D. Napf

APPROVED WASHINGTON COUNTY
BOARD OF COMMISSIONERS
MINUTE ORDER # 17-351
DATE 12-19-2017
BY A. D. Napf
CLERK OF THE BOARD

[Signatures continued on following page]

ACCEPTED AND AGREED TO BY METRO:

By: 
Martha Bennett
As Its: Chief Operating Officer

Date: 1/22/18

ATTEST:

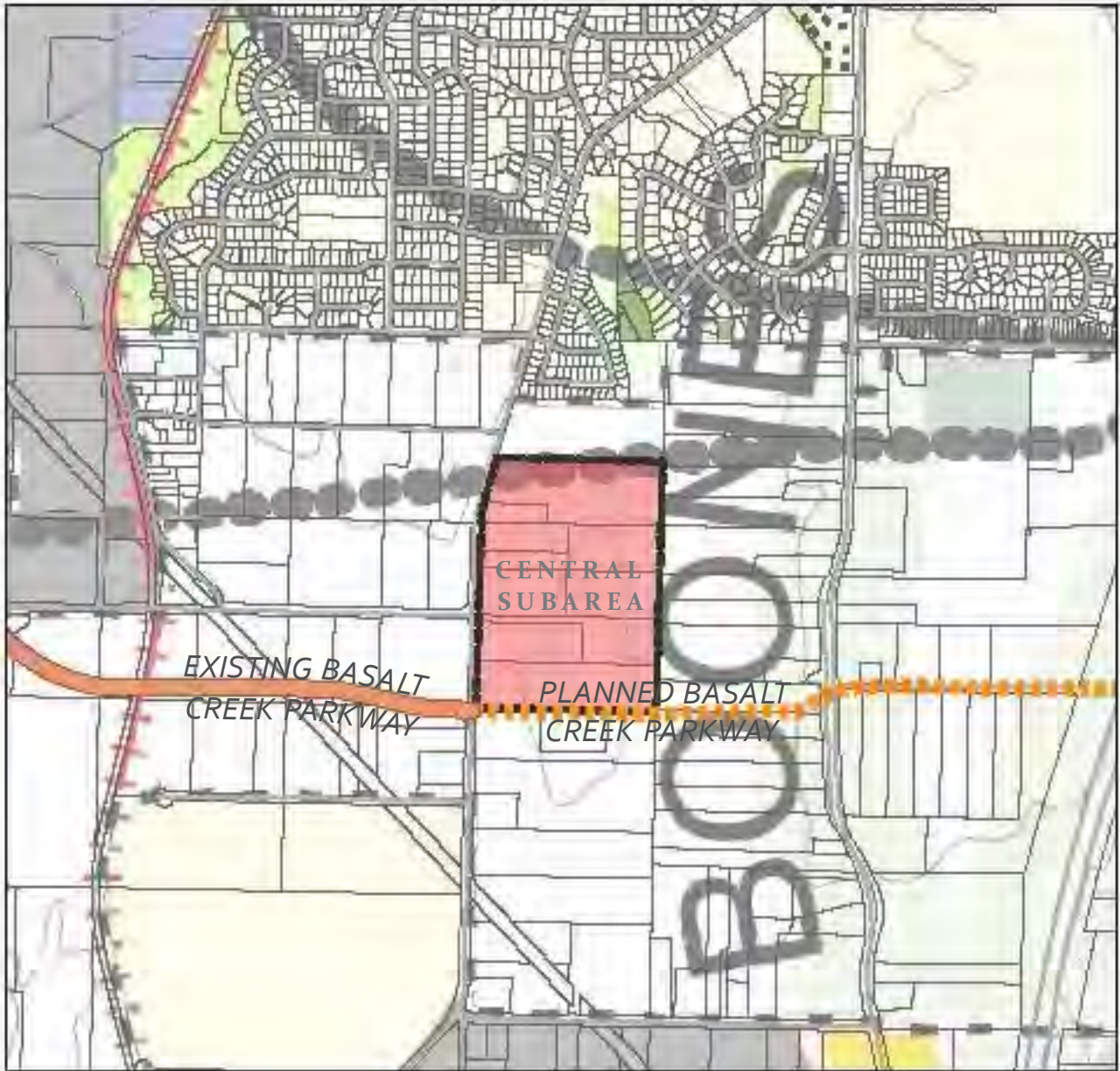
By: 

Exhibit 1: Central Sub Area



This map is derived from various digital database sources. While an attempt has been made to provide an accurate map, the City of Tualatin, OR assumes no responsibility or liability for any errors or omissions in the information. This map is provided "as is".

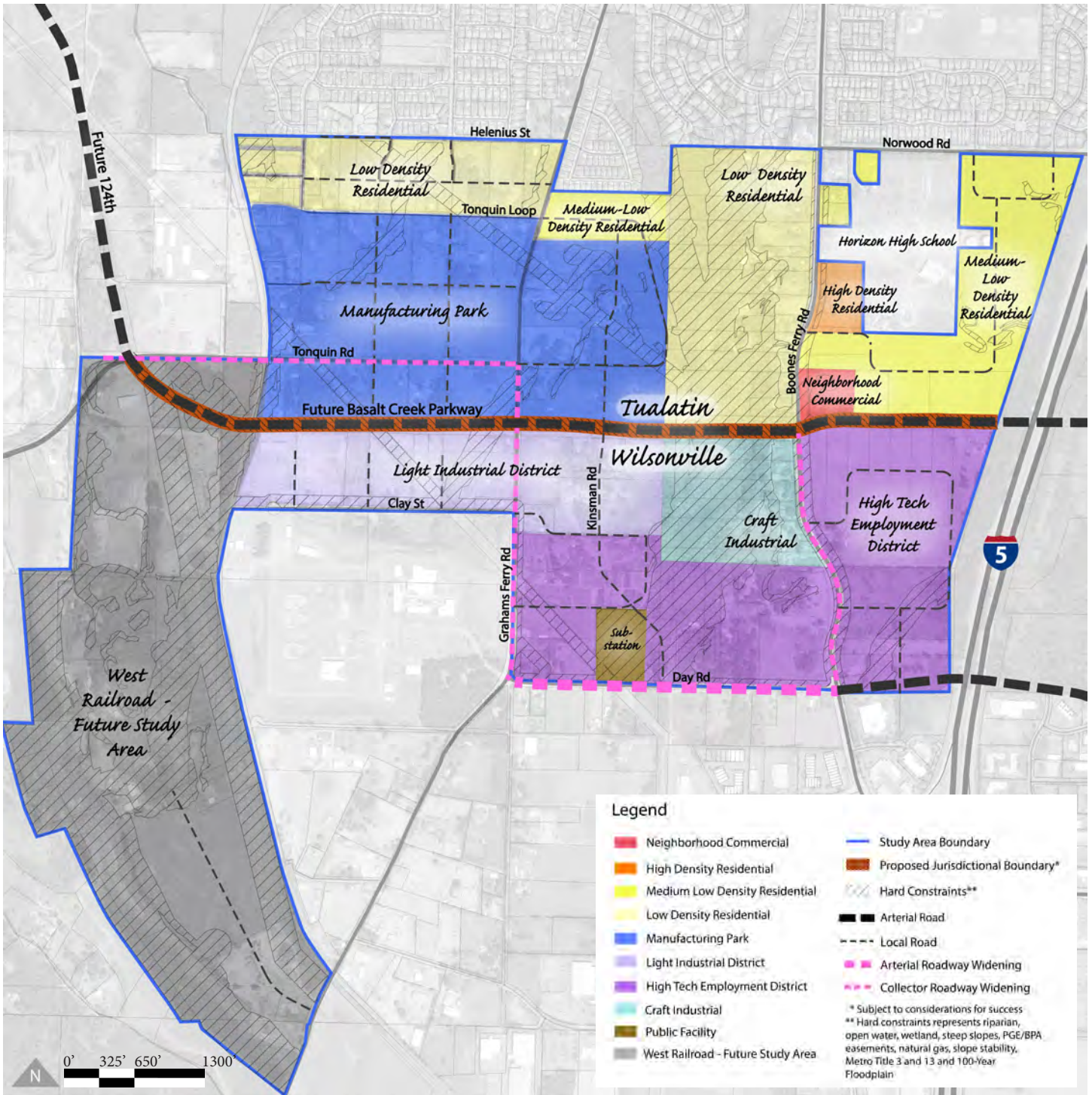
EXHIBIT A TO RESOLUTION 18-4885
EXHIBIT B



Central Subarea and Basalt Creek Parkway
overlaid on 2040 Growth Concept Map

EXHIBIT A TO RESOLUTION 18-4885

EXHIBIT C



Basalt Creek Land Use Concept Map

DRAFT September 16, 2016

EXHIBIT A TO RESOLUTION 18-4885

EXHIBIT D



WASHINGTON COUNTY
OREGON

October 27, 2016

Mayor Ogden
Tualatin City Council
18880 SW Martinazzi Ave,
Tualatin, OR 97062

Dear Mayor Ogden and Members of the Tualatin City Council:

I am writing to express concerns to the Board of County Commissioners regarding potential increases in the amount of residential units proposed in the Tualatin side of the Basalt Creek Concept Plan.

We believe this area to be prime future industrial land needed to support the regional economy. In 2013, Washington County, City of Tualatin, City of Wilsonville, and Metro acknowledged the Basalt Creek Transportation Refinement Plan. This plan identified transportation infrastructure needed to support this future industrial area. We have moved forward in support of this agreement with construction of the new 124th arterial to leverage future economic development. We believe that eliminating industrial land beyond what the latest concepts show would be a big mistake for the economic health of South County and counter to our agreement.

Our IGA calls for the Cities to coordinate with the County in developing a concept plan for the Basalt Creek area. After the concept plan is complete, we can amend our Urban Planning Area Agreement to include this area, which is necessary for annexations to occur. This area is currently not included in our Urban Planning Area Agreement with Tualatin.

The City needs to be reminded the Basalt Creek Planning area is not currently within our Urban Planning Area Agreements. We believe Washington County is a partner in the planning of this area and would like to weigh in before any decision is made or report accepted that would substitute more residential units for employment areas.

Sincerely,

A handwritten signature in black ink, appearing to read "Andy Duyck". The signature is fluid and cursive.

Andy Duyck, Chairman
Washington County Board of Commissioners

c: Andrew Singelakis, Director, Land Use & Transportation

Board of County Commissioners
155 N. First Avenue, Suite 300, MS 22 Hillsboro, OR 97124-3072
Phone: (503) 846-8681 Fax: (503) 846-4545

Basalt Creek Transportation Refinement Plan Recommendations

Introduction

The Basalt Creek transportation planning effort analyzed future transportation conditions and evaluated alternative strategies for phased investments that support regional and local needs.¹ This document reflects the Policy Advisory Group’s unanimous approval of the transportation investments, next steps for policy and plan updates, and potential funding strategies described in this document.

Purpose

The purpose of this refinement plan was to determine the major transportation system connecting Tualatin-Sherwood Road to I-5 in North Wilsonville through the Basalt Creek Planning Area, which is currently an unincorporated urban area of Washington County between the cities of Tualatin to the north, and Wilsonville to the south (see Figure 1). This plan refines recommendations from the I-5/99W Connector Study and the Regional Transportation Plan, setting the stage for land use concept planning and comprehensive plan development for the Basalt Creek area.

Planning Context

The need to plan for the future transportation system in the Basalt Creek area is driven not only by future growth in the Basalt Creek Planning area itself, but by future growth in surrounding areas targeted for industrial development. Basalt Creek currently lacks the multi-modal transportation facilities needed to support economic and urban-level development. Several planning

The Basalt Creek Transportation Refinement Plan was a joint effort involving:

- Washington County
- City of Tualatin
- City of Wilsonville
- Metro
- The Oregon Department of Transportation
- Area Citizens

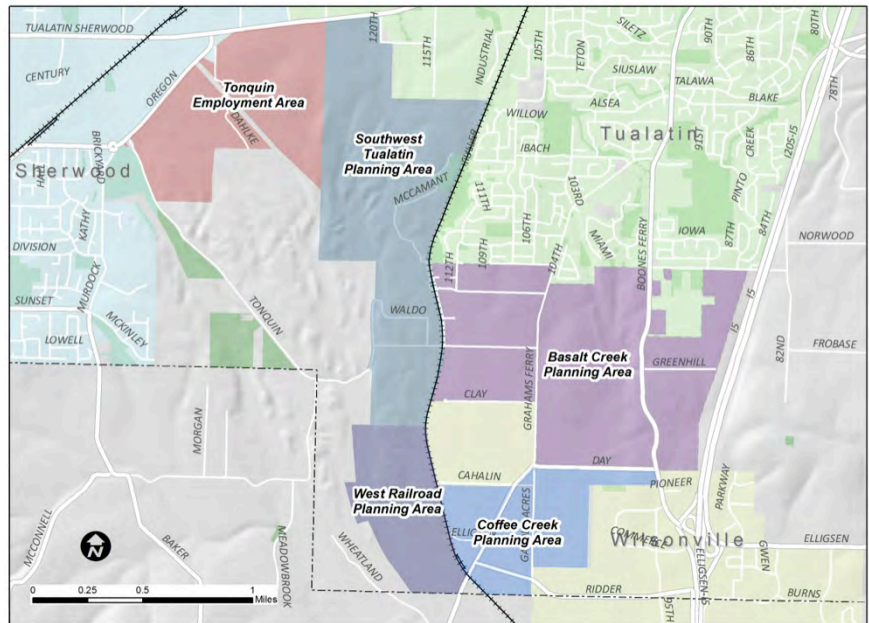


Figure 1: Basalt Creek Planning Area Location

¹ See *Basalt Creek Transportation Refinement Plan Technical Report* for more information.

EXHIBIT A TO RESOLUTION 18-4885 EXHIBIT E

January 2013

efforts, summarized below, provide background and context for the Basalt Creek Transportation Refinement Plan.

- The **I-5/99W Connector Study** recommended an alternative that spreads east-west traffic across three smaller arterials rather than a single expressway. Although specific alignments for these arterials were not defined, the eastern end of the Southern Arterial was generally located within the Basalt Creek Planning Area, south of Tonquin Road. The present planning effort aims to further define the location of the connection between the SW 124th Avenue Extension and the I-5/Elligsen interchange in a manner that does not preclude the future Southern Arterial west of SW 124th.
- The **2035 Regional Transportation Plan (RTP)** calls for detailed project planning and near-term construction of an extension of SW 124th Avenue from Tualatin-Sherwood Road to the I-5/Elligsen Road interchange, supporting industrial access from the Tonquin, Southwest Tualatin, and Basalt Creek Planning Areas. The RTP also calls for the near-term construction of the Tonquin Trail (see below).
- The **Tonquin Employment Area, Southwest Tualatin Concept Planning Area, and Coffee Creek Planning Area** together comprise about 1,000 acres surrounding the Basalt Creek area that are planned primarily for industrial use. These areas are expected to generate growing freight and work-related travel demands on the multi-modal transportation network that runs through the Basalt Creek area.
- The **SW 124th Avenue Extension** Project, currently underway, is planning and designing the corridor described in the RTP from Tualatin-Sherwood Road to Tonquin Road. The present planning effort aims to extend the corridor to I-5 as envisioned in the RTP and ensure consistency with current SW 124th Avenue project.
- Washington County's **Boones Ferry Road** improvement project, also currently underway, provides pedestrian and bicycle improvements and an intermittent center turn lane between Norwood Road and Day Road. It is an assumed improvement for the Basalt Creek area.
- Near-term construction of the **Tonquin Trail** is called for in the RTP. The master plan identifies an alignment for new bicycle and pedestrian connections between Sherwood, Tualatin, and Wilsonville, with connections to the larger regional trail system. The Tonquin Trail will travel through the Southwest Tualatin Concept Plan Area and the Tonquin Employment Concept Plan Area, and is an assumed improvement within the Basalt Creek Transportation Refinement Plan.
- **Transportation System Plan** updates for Washington County, Tualatin, and Wilsonville are currently underway. Washington County will incorporate recommendations from this refinement plan into the County TSP update. The cities of Tualatin and Wilsonville will not incorporate these recommendations into their current TSP updates, but will carry the recommendations into land use concept planning and future TSP updates.

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Facility Considerations and Characteristics

At the outset of this effort, agencies articulated a set of considerations to guide selection of the preferred transportation system as well as preferred characteristics of the primary east-west facility through the area.

- **Guiding considerations** included: ability to fund and phase improvements, level of impacts (environmental, right-of-way, etc.), support for development, consistency with regional policy, and traffic operations performance.
- **Facility characteristics** included: for the primary arterial connection, a 45 mph prevailing speed and access spacing of one-half mile to one mile to improve capacity.

Recommendation

The Policy Advisory Group (PAG), which consists of elected officials and key staff from the project's five partner agencies, recommends the following elements as part of an overall Action Plan (illustrated in Figure 2) for the area.

Roadways

The final recommendation is for a combination of new and improved roadways through the Basalt Creek area. The key new roadway through the area is a five-lane east-west extension of SW 124th Avenue, aligned south of Tonquin Road and extending east to Boones Ferry Road. The recommendation also includes improvements to existing roadways in the area, such as Tonquin Road, Grahams Ferry Road, Boones Ferry Road, and Day Road.

Protection of right-of-way for the new east-west roadway from the 124th Avenue extension to Boones Ferry Road is a key element of this recommendation. Right-of-way protection and purchase will be addressed separately, concurrent with the Basalt Creek land use concept planning.

During the planning process, the City of Wilsonville expressed concern about the structural condition of Day Road (i.e., failing roadway base and resulting pavement deterioration) and its ability to carry freight traffic for further development of industrial lands. While the Basalt Creek Transportation Refinement Plan focused on roadway needs related to capacity, the PAG agreed that the function of the arterial network in the Basalt Creek area includes providing roadways with adequate structural design for regional freight needs. Therefore, the PAG agreed that the project recommendations include a commitment to address the construction, operations, and maintenance of the arterial network through the concept planning process.

Overcrossings

The ability to construct two new I-5 overcrossings, including an off-street multi-use path, should be preserved in order to provide for future circulation and connectivity across the Basalt Creek area and into areas east of I-5. These overcrossings are recommended as long-term improvements and are likely not needed until 2035 or later. Forecasts show that the second overcrossing is not needed unless surrounding urban reserve areas east of I-5 and south of I-205 are developed. This refinement plan is neutral on the timing of urban reserves development, and therefore does not specify the timing and order of overcrossing improvements.

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Active Transportation

All improved roadways in the Action Plan include bike lanes and sidewalks consistent with Washington County urban standards. This recommendation also includes integration of the regional Tonquin Trail into the transportation network. Metro, in close coordination with the cities of Tualatin, Wilsonville, Sherwood, and Washington and Clackamas counties, led the master planning effort that identified a preferred alignment that travels through the Basalt Creek Planning Area. Roadway cross-sections and right-of-way purchases for the future east-west facility will consider needs for the Tonquin Trail in the design for the railroad overcrossing and improvements to Tonquin Road between Morgan Road and Tonquin Loop Road. Design for the east-west facility should also consider providing an off-street multi-use path that connects to the Tonquin Trail and extends east of I-5. Details of how this multi-use path will be integrated with the east-west facility design will be refined during later land use concept planning.

Action Plan

The recommended Action Plan consists of 18 transportation investments, shown in Figure 2. Timing of projects was prioritized through an analysis of likely transportation needs in 2020, 2030, and 2035 based on growth assumptions from the adopted Regional Transportation Plan. Because of uncertainty regarding the years during which development in the Basalt Creek Planning Area and surrounding areas will occur, phasing for investments is classified as short-term, medium-term, and long-term. Descriptions of these investments, as well as timing and the funding needed, are shown in Table 1. Cost estimates include right-of-way.

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Table 1: Basalt Creek Action Plan

ID	Project	Short-Term	Medium-Term	Long-Term	Cost (\$2012)
1	124 th Avenue Extension (Tualatin-Sherwood Road to Tonquin Road): Construct three lane road extension with bike lanes and sidewalks	x			\$20,000,000
2	Tonquin Road (124 th Avenue to Grahams Ferry Road): Widen to three lanes with bike lanes and sidewalks, grade separate at railroad, improve geometry at Grahams Ferry Road ¹	x			\$10,500,000
3	Grahams Ferry Road (Tonquin Road to Day Road): Widen to three lanes with bike lanes and sidewalks	x			\$5,400,000
4	Boones Ferry Road (Norwood Road to Day Road): Widen to three lanes with bicycle and pedestrian improvements	x			\$10,800,000
5	124 th Avenue/Tonquin Road Intersection: Signal (may include Tonquin Trail crossing)	x			-. ²
6	Grahams Ferry Road/Tonquin Road Intersection: Signal	x			\$500,000
7	Boones Ferry Road/Day Road Intersection: Add second southbound through approach lane	x			-. ³
8	Boones Ferry Road/95 th Avenue Intersection: Construct dual left-turn and right-turn lanes; improve signal synchronization, access management and sight distance	x			\$2,500,000
9a	Tonquin Trail (Clackamas County Line to Tonquin Loop Road): Construct multi-use trail with some segments close to but separated from road	x			\$8,900,000 ⁴
9b	Tonquin Trail (Tonquin Loop Road to Tualatin-Sherwood Road): Construct multi-use trail with some segments close to but separated from road		x		\$7,100,000 ⁴
10	124 th Avenue Extension (Tualatin-Sherwood Road to Tonquin Road): Widen from three to five lanes with bike lanes and sidewalks		x		\$14,000,000
11	East-West Arterial (124 th Avenue to Boones Ferry Road): Construct 5 lane roadway with railroad and creek crossings, integrate segment of Tonquin Trail ⁵		x		\$57,900,000
12	Boones Ferry Road (East-West Arterial to Day Road): Widen to five lanes with bike lanes and sidewalks		x		\$1,100,000
13	Kinsman Road Extension (Ridder Road to Day Street): Construct three lane road extension with bike lanes and sidewalks		x		\$10,400,000
14	Day Road (Kinsman Road to Boones Ferry Road): Widen to five lanes with bike lanes and sidewalks		x		\$5,800,000
15	I-5 Southbound off-ramp at Boones Ferry Road/Elligsen Road: construct second right turn lane		x		\$500,000
16	Boones Ferry Road/95 th Avenue Intersection: Access management		x		-. ⁶
17	Day Road Overcrossing: Extend new four lane crossing over I-5 from Boones Ferry Road to Elligsen Road			x	\$33,700,000- \$44,100,000 ⁷
18	East-West Arterial Overcrossing: Extend new four lane crossing over I-5 from Boones Ferry Road to Stafford Road. Integrate multi-use path in corridor that connects to Tonquin Trail			x	\$38,000,000
TOTAL		\$59M	\$97M	\$72-82M	\$228-238M

¹ Grade separation for Tonquin Road is optional. An at-grade crossing would reduce cost by around \$2,000,000

² Cost included in Project 1

³ Coordinate with Project 4. Cost of approach lane included in estimate for Project 12

⁴ Tonquin Trail cost estimated by Metro as part of trail planning effort

⁵ Project 11 can potentially be built in two phases funded separately, west and east of Grahams Ferry Road. However, traffic benefits needed in the medium term (around 2030) will not be realized unless entire project is completed

⁶ Project details to be determined by further coordination between City of Wilsonville and ODOT. Cost expected to be minimal

⁷ Specific alignment approaching Elligsen Road will determine project cost. Alignment to Parkway Center Drive is estimated at \$33,700,000, and alignment to Canyon Creek Road is estimated at \$44,100,000

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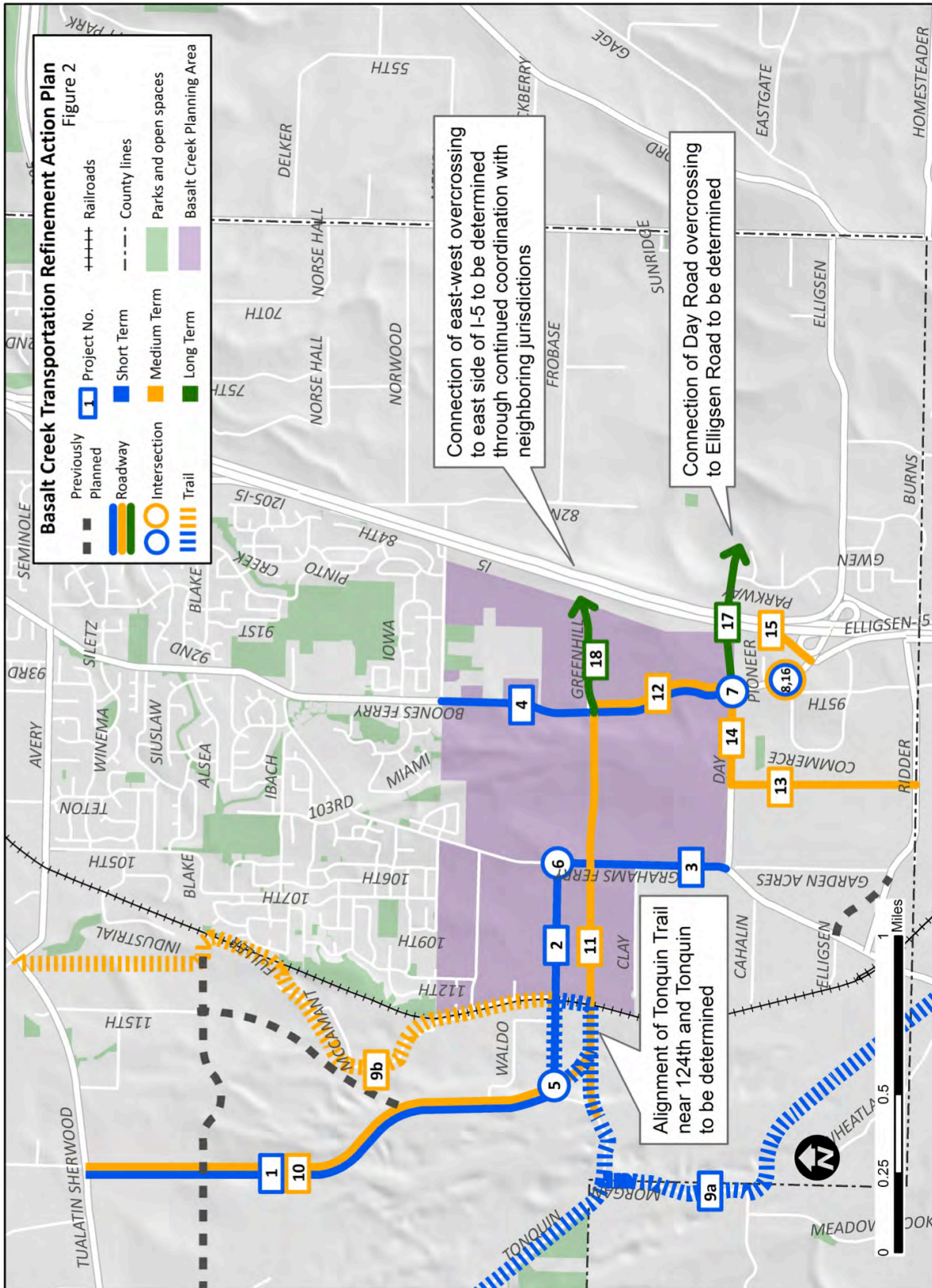


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Each investment adds important improvements to the major transportation system in the Basalt Creek area to support future development, adding new multimodal facilities and upgrading existing facilities to urban standards. Although not shown on the map, it is expected that future concept planning will identify locations for additional, lower-classification roads and other transportation facilities to serve future development as well.

Are these new projects?

While cost estimates for the entire recommendation may total as high as \$238,000,000, all of the 18 projects have some relation to investments already planned in the adopted RTP. Table 2 shows projects from the RTP that have overlap or similarity to projects contained in the Action Plan. **Note that many of these projects are different in scope from those contained in the Action Plan, and will have different cost estimates. Future RTP updates may include updated cost estimates from this study.**

Table 2: Related projects from the Regional Transportation Plan

RTP ID	RTP Project	Related Action Plan Projects	Time Period	Cost (\$2007)
10736	124 th Avenue: Construct new street from Tualatin-Sherwood Road to Tonquin Road: 5 lanes	1,5,10,11	2008-2017	\$82,500,000
10590	Tonquin Road: Realign and widen to three lanes with bike lanes and sidewalks (Oregon Street to Grahams Ferry Road)	2,6	2018-2025	\$28,406,000
10588	Grahams Ferry Road: Widen to three lanes, add bike/pedestrian connections to regional trail system and fix undersized railroad crossing (Helenius Street to Clackamas County line)	3	2008-2017	\$28,000,000
10732	Boones Ferry Road: Widen to five lanes (Norwood Road to Day Road)	4,7,12	2018-2025	\$40,050,000
10852	95 th /Boones Ferry/Commerce Circle Intersection Improvements	8,16	2008-2017	\$2,500,000
10854	Tonquin Trail: Construct multi-use trail with some on-street segments (Tualatin-Sherwood Road to Clackamas County line)	9a,9b	2008-2017	\$3,000,000
10853	Kinsman Road extension with bike lanes and sidewalks (Ridder Road to Day Road)	13	2008-2017	\$6,500,000
11243	Day Road reconstruction to accommodate trucks (Grahams Ferry Road to Boones Ferry Road)	14	2008-2017	\$3,200,000
11342	I-5/99W Connector Southern Arterial/I-5 Interface ¹	15,17,18	2026-2035	\$50,000,000

¹ Construction of projects specifically related to the I-5/99W Connector Southern Arterial, such as the I-5 interface, are contingent on certain project conditions being met. See Regional Transportation Plan for details.

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Policy and Plan Updates

Recommendations in this plan allow new concept planning efforts to move forward and provide guidance for updates of existing transportation plans.

Basalt Creek and West Railroad Area Concept Planning

The transportation system recommended in this plan becomes the framework for more detailed land use concept planning of the Basalt Creek Planning Area and West Railroad Planning Area by the cities of Tualatin and Wilsonville. Key recommendations to be carried forward during concept planning include:

- Protection of the major transportation facility corridors from development encroachment.
- Coordination of the local transportation system with the transportation investments included in this plan (unless amended by the parties of this study). Each roadway in the Basalt Creek area has access spacing standards that protect the safety and operations of the system, and these standards help determine appropriate local street connections. The new east-west facility is limited to accesses at 124th Avenue, Grahams Ferry Road, and Boones Ferry Road.
- Detailed concept planning in the Basalt Creek area should consider multi-use path connections to the Tonquin Trail that emphasize directness and minimize conflicts, enhancing bicycle and pedestrian access to new residential and employment areas. In the West Railroad area, concept planning will also include sections of the Tonquin Trail.

Regional Transportation Plan

In many cases, this transportation refinement plan provides new detail and cost estimates for projects that are already in the adopted RTP. These refined project descriptions, cost estimates, and timing considerations should be considered when projects are forwarded to Metro for the next RTP update. Examples of RTP projects that overlap with projects in this refinement plan include:

- 10590 (Tonquin Road). Action Plan project #2 includes a grade-separated railroad crossing, which is not included in the RTP project description.
- 10852 (95th/Boones Ferry/Commerce). Action Plan projects 8 and 16 will require further coordination with ODOT to determine geometry and timing of intersection improvements.
- 11243 (Day Road). Action Plan project #14, which widens part of Day Road, should also upgrade the roadway structure and pavement conditions to accommodate increasing heavy truck volumes. Although project #14 applies only to the section of Day Road between Kinsman Road and Boones Ferry Road, funding of roadway reconstruction between Kinsman Road and Grahams Ferry Road should also be discussed as part of land use concept planning.
- 10854 (Tonquin Trail). Action Plan projects #2, #5, #11 all need to consider Tonquin Trail in their design, including most recent alignment information and cost estimates from the trail master plan.

Washington County TSP Update

Most of the projects included in the Action Plan are new facilities in unincorporated Washington County or improved facilities already under County jurisdiction. An amendment to update the Washington County TSP will be done in 2013 to incorporate the descriptions, cost estimates, and timing of these projects.

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Tualatin and Wilsonville TSP Updates

The Cities of Tualatin and Wilsonville are also currently updating their transportation system plans. However, because concept planning for Basalt Creek will include agreement on the future city limit boundary between the two cities, as well as more detailed transportation network considerations, the projects included in this plan will not be incorporated as part of the current TSP updates. Future TSP updates may reflect elements from this refinement plan by amending project lists, maps, and funding strategies.

Funding

Funding for some short-term Action Plan projects has already been programmed by Washington County through their Major Streets Transportation Improvement Program (MSTIP). This includes \$16.9 million (\$10.9 million in MSTIP funding and \$6 million from other sources) for an interim two-lane extension of SW 124th Avenue from Tualatin-Sherwood Road to Tonquin Road. It also includes an additional \$10 million for right-of-way purchase or other improvements from the list identified by this Plan. Washington County has also provided \$11 million in funding for the current Boones Ferry Road improvement project.

While this recommendation does not identify a specific overall funding strategy for the Action Plan, there are many existing revenue sources that may be used to fund the recommended investments. **Many are subject to a state or regionally competitive process where success can hinge on having a broadly supported plan in place.**

The revenue sources listed below form the basis of the financially constrained Regional Transportation Plan and related project list, which already contains many of the recommended Basalt Creek investments. The RTP assumes federal, state, and local sources, all of which will be key to funding the Action Plan.

Federal

Based on MAP-21² legislation, sources may include:

- **National Highway Performance Program (NHPP).** These funds are intended for rehabilitation and expansion of principal arterials, especially those with important freight functions.
- **Regional Surface Transportation Program (STP) funds.** These funds may be used for virtually any transportation purpose short of building local residential streets.
- **Congestion Mitigation/Air Quality (CMAQ) funds.** These funds typically support biking, walking, and transit projects, and other projects that help to achieve air quality standards.
- **Transportation Alternatives (TA) funds.** TA takes the place of previous programs such as Transportation Enhancements and Recreational Trails, and may be used to fund a variety of non-motorized projects.

² For more information see <http://www.fhwa.dot.gov/map21/>

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These funds are allocated to projects through a state or regionally managed competitive process for inclusion in the Metropolitan Transportation Improvement Program (MTIP) and the State Transportation Improvement Program (STIP).

State

State sources include the statewide gas tax, vehicle registration fees, and weight-mile taxes on trucks. These funds typically go to road and bridge maintenance projects, but funding for projects of regional significance, such as those provided by Oregon House Bill 2001 Jobs and Transportation Act (JTA), may be made available for modernization. Again, having a plan in place allows projects to access funds when new funding opportunities become available.

Local

A variety of local funding sources are available, although some, such as urban renewal and local improvement districts, are subject to approval. Sources may include:

- Washington County Major Streets Transportation Improvement Program (MSTIP)
- Local portion of State Highway Trust Fund
- Local gas tax
- Transportation System Development Charges (SDCs) or Transportation Development Taxes (TDTs) levied on new development
- Urban renewal funding
- Developer contributions
- Local improvement districts (LIDs)

EXHIBIT A TO RESOLUTION 18-4885

EXHIBIT F

Where Portland region's residents work

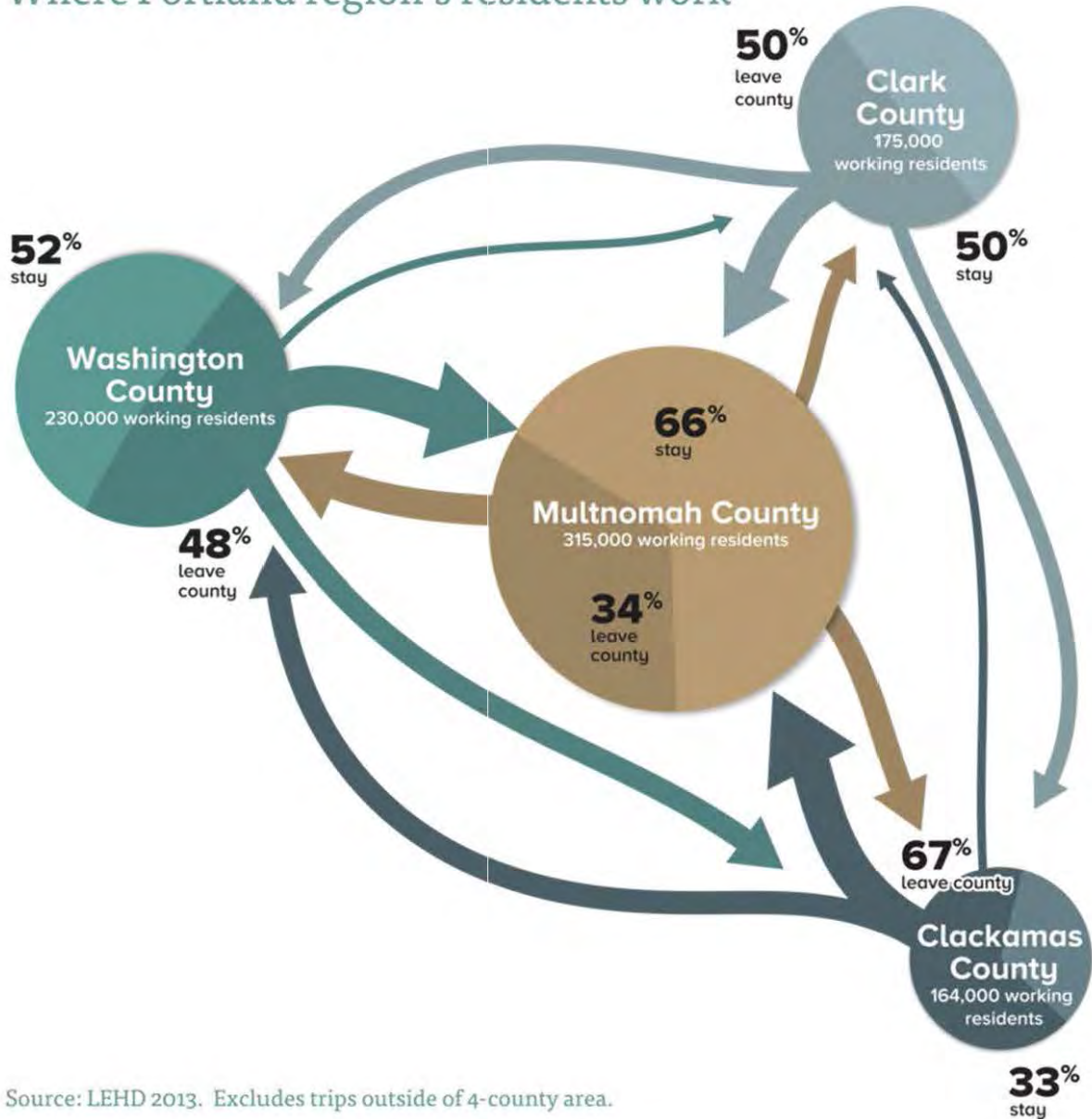


EXHIBIT B TO RESOLUTION 18-4885

Supplemental Findings of the Metro Council In Support of Resolution No. 18-4885 Regarding the Basalt Creek Planning Area

These findings supplement the decision of the Metro Council in Resolution No. 18-4885 regarding its arbitration of the dispute between the City of Tualatin and the City of Wilsonville concerning the concept plan for the Basalt Creek Planning Area. The Metro Council adopts these supplemental findings in support of its decision to adopt the Metro COO Recommendation dated March 26, 2018 regarding the appropriate designation of the Central Subarea.

1. Process and Record

The Intergovernmental Agreement (IGA) among Metro, the two cities, and Washington County dated January 22, 2018 expressly delegates complete authority and discretion to Metro regarding the creation of a process to arbitrate the dispute between the cities. Metro described the process in a letter to the cities and the county dated February 15, 2018. The process calls for a written recommendation to the Metro Council from the Metro Chief Operating Officer (COO) to be made after review of written evidence and argument submitted by the cities and the county during two consecutive open record periods. As stated in that letter, “the Metro Council’s review will be based on the record of written materials submitted by the cities, county, and Metro staff.”

The first open record period closed on March 7, 2018; the second (and final) open record period closed on March 14, 2018. As contemplated by the parties to the IGA, Metro received submittals from the two cities and the county during those time periods. Metro also received emails from two property owners, one from Peter Watts dated March 7, 2018 and another from Herb Koss dated March 8, 2018. Those emails raised objections to the process and requested that the emails and attached exhibits be included in the record. The email from Mr. Watts included references to 12 attached exhibits, but no exhibits were attached. However, the first 11 of the 12 referenced exhibits were attached to the email from Mr. Koss, which forwarded an earlier similar version of the email from Mr. Watts. The first 11 exhibits referenced in the email from Mr. Watts were also included in the exhibits attached to the briefs submitted by the cities on March 7, 2018, and those exhibits are therefore part of the record.

The process created by Metro calls for an “on the record” review of the COO Recommendation by the Metro Council. Accordingly, any evidence or other testimony that was not provided to the Metro COO during the open record period prior to the

EXHIBIT B TO RESOLUTION 18-4885

issuance of her recommendation is not properly before the Metro Council in this proceeding, and is expressly rejected.

The two property owners who submitted emails to the Metro COO raise objections to the process, alleging that Metro's proposal to only accept evidence and argument from the cities and the county violates Statewide Planning Goal 1 and Metro's Public Engagement Guide. As described above, Metro agreed to accept the testimony that was provided via email from the property owners on March 7, 2018 and March 8, 2018 for consideration by the Metro COO in making her recommendation to the Metro Council.

Metro disagrees with the implicit assertion by the property owners that the process created by Metro results in a final land use decision that is subject to Goal 1 and typical land use decision-making procedures. At the request of the cities, Metro agreed to create a unique arbitration process for the limited purpose of resolving their dispute. The purpose and intent of Metro and the cities was solely to resolve a dispute, and not to create a process that would result in a final land use decision.

The Metro Council's adoption of Resolution No. 18-4885 does not result in the adoption or amendment of a concept plan or a comprehensive plan map for the Basalt Creek area, and does not itself have any effects on land use. Metro's decision has no effect until it is implemented by the cities in their own future land use decisions, as described in paragraph 2 of the IGA. Those local land use decisions will need to be supported by substantial evidence in the record, and will be appealable to LUBA.

2. Regional Housing Needs

The March 7, 2018 email from Peter Watts includes a Metro-specific argument regarding regional housing needs that was not previously raised before the cities. The gist of the argument is that the Central Subarea should be designated for residential purposes in order to address an "extreme need" for more housing in the Metro region. Mr. Watts asserts that this need exists by challenging certain growth-related forecasts made by Metro in its most recent Urban Growth Report (UGR), which was adopted by the Metro Council in 2015 and concluded that the region has enough land inside the boundary to meet housing needs for 20 years.

A slightly different version of this argument is addressed in the COO Recommendation in response to arguments made by the City of Tualatin. The COO Recommendation notes that there is broad agreement in the region that there is an immediate need to address the

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current shortage of *affordable* housing, and building a new residential subdivision on undeveloped land south of Tualatin does not address that shortage.

Metro's most recent UGR in 2015 concluded that, based on peer-reviewed population growth forecasts for the region, there was no need to expand the Urban Growth Boundary because there is a sufficient supply of residentially zoned land in the region to accommodate 20 years of growth. The growth forecasts, buildable land inventory, and legal conclusions in the UGR were adopted by the Metro Council via Ordinance No. 15-1361. That ordinance and the UGR were not challenged by any party, are acknowledged by DLCD, and are not subject to collateral attack in this proceeding.

Metro planning department staff reviewed the arguments and data provided in the March 7, 2018 email from Mr. Watts and were unable to fully understand the arguments or corroborate the cited data regarding population forecasts and 2016 census figures. For example, there is a reference to U.S. Census estimates showing one-year 2016 population growth of 57,677 in Metro cities with populations over 5,000. Metro staff was unable to identify a census-based source for the 57,677 figure, which is significantly higher than the annual increases shown in U.S. Census data for the entire seven-county Portland Metropolitan Statistical Area (MSA).

The population forecast in Metro's UGR is based in part on census data for the seven-county MSA. Those figures show an average annual increase of just 23,300 people in all seven counties between 2010 and 2015. UGR Appendix 1a, page 9. The UGR forecast for 2020 predicts an average annual increase of 35,300 people in all seven counties. Based in part on the U.S. Census data, the UGR projects that there will be about 400,000 more people in the Metro UGB over the 20-year period ending in 2035, which reflects an average increase of approximately 20,000 people each year – a forecast that is consistent with previous annual averages within the UGB.

Even if the census data could be corroborated, it is empirically misguided to use a single year of estimated population growth in an attempt to disprove the accuracy of a 20-year forecast. Population increases are subject to fairly dramatic fluctuations on a year-to-year basis, and a single year of high growth can be easily offset by much lower growth in subsequent years. It appears that some of the figures cited by Mr. Watts attempt to create an annualized growth projection for individual cities. However, the purpose of the UGR is to assess the adequacy of the regional land supply over a 20-year horizon, not to assess the annual local growth and future land needs for each individual city. The UGR provides a long-term regional forecast regarding the next 20 years that is not intended to capture annual growth fluctuations and/or business cycles in individual jurisdictions.

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Another argument asserts that the 2015 UGR improperly allocates 27% of future housing to “high rise condos.” The actual figure in the UGR is 26%, and it is not assigned to “high rise condos,” it is assigned to any multifamily dwelling of two units or more. UGR Appendix 4, Table 11. This would include duplexes, rowhouses, one or two-story condos or co-housing developments, and any other form of ownership structure involving at least two attached units.

The housing-related argument is summarized as follows: (1) in the 2015 UGR, Metro incorrectly applied ORS 197.296 and adopted inaccurate future growth projections; (2) because of those errors, there is “an inadequate amount of available unconstrained buildable land in the region” for residential purposes; and (3) therefore, the 52-acre Central Subarea should be planned for residential purposes. First, Metro’s growth management decision in 2015 is not being reviewed in this proceeding. This arbitration does not provide a forum to collaterally attack Metro’s application of ORS 197.296 or Metro’s population forecasts in the 2015 UGR. The conclusions in the UGR were adopted by ordinance, acknowledged by DLCD, and under ORS 195.036 must be applied by Metro and local governments in the region for land use planning purposes until the next UGR is adopted at the end of 2018. Because that process is currently underway, stakeholders who are interested in regional growth issues already have an opportunity this year to comment on any perceived deficiencies in the population-related data and projections that were made in 2015.

Second, even if there was evidence in the record suggesting that actual growth in 2016 outpaced the 2015 forecast, that does not mean there is currently an inadequate amount of buildable land for housing in the Metro region. The Metro Council adopted the UGR a little over two years ago, concluding that there is enough buildable land inside the UGB to provide housing for the next 20 years. Mr. Watts is arguing that the region has already used up 20 years’ worth of its buildable land supply in the last 2.5 years; however, the evidence in the record does not support that conclusion.

The COO Recommendation provides a detailed analysis of the planning goals and expectations of local government stakeholders regarding the Basalt Creek Planning Area and the Central Subarea. As noted in that recommendation, “the planning history of the Central Subarea and the planning expectations of local government stakeholders lean heavily in the direction of an employment designation.” The Metro Council finds that unsubstantiated arguments regarding an inadequate land supply inside the UGB do not provide a compelling basis to reject the COO Recommendation.

Materials following this page were distributed at the meeting.