

Council work session agenda

Tuesday, March 9, 2021

2:00 PM

<https://zoom.us/j/96717147770> Phone: +1

346 248 7799

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2:00 Call to Order and Roll Call

Work Session Topics:

2:10 Regional Flexible Funds Update

[20-5522](https://www.oregonmetro.gov/20-5522)

Presenter(s): Daniel Kaempff, Metro

Attachments: [Work Session Worksheet](#)

[Exhibit A](#)

[Exhibit B](#)

[Exhibit C](#)

[Exhibit D](#)

[Exhibit E](#)

2:55 Chief Operating Officer Communication

3:00 Councilor Communication

3:05 Adjourn

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

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Regional Flexible Funds Update

Work Session Topics

Metro Council Work Session
Tuesday, March 9, 2021

COUNCIL DIRECTION ON THE 2025-2027 REGIONAL FLEXIBLE FUNDS ALLOCATION

Date: February 23, 2021
Department: Planning & Development
Meeting Date: March 9, 2021

Prepared by: Dan Kaempff,
daniel.kaempff@oregonmetro.gov
Presenter(s): Margi Bradway, Ted
Leybold, Dan Kaempff
Length: 60 minutes

ISSUE STATEMENT

During 2021 and 2022 Metro – in its role as the federally designated Metropolitan Planning Organization (MPO) – must conduct the activities associated with selecting regional transportation investments to be funded with the region’s allotment of federal funds, what has been termed locally as the Regional Flexible Funds.

This document introduces the work program outline and schedule of activities required to carry out the 2025-2027 Regional Flexible Funds Allocation (RFFA). In previous RFFA cycles, Council has indicated their desire for early engagement on the process and has provided initial input on their intent for how these funds are to be used to advance regional obligations and priorities. Staff is requesting input from Council at the outset of the current allocation process. (Additional opportunities for input will be provided throughout the process.)

The Regional Flexible Funds are an important piece of the region’s transportation funding, though they represent a relatively small (~5%) percentage of the total funding spent on transportation in the past. Historically, the region has thoughtfully used these federal funds to invest in parts of the transportation system that are critical to advancing the goals and objectives of the Regional Transportation Plan (RTP) and Metro’s Six Desired Outcomes. At the outset of each RFFA cycle, it has been the practice of previous Metro Councils to indicate key outcomes they wish to see reflected in the resolutions adopting program direction and the selection of transportation investments. In the last allocation of RFFA funds, Metro Council’s priorities reflected the four focus areas of the 2018 RTP: equity, climate, safety and congestion relief.

Through this allocation of Regional Flexible Funds, Council will be requested to give staff direction in 2021 and 2022, and take actions on two resolutions. The first action is the establishment of the RFFA Program Direction. This document details how the funds are to be spent to advance specific elements identified in the RTP. This action is scheduled for late July 2021.

The second action is the adoption of a final selection of investments and projects to be funded. This is scheduled to occur in October 2022.

ACTION REQUESTED

Staff is requesting initial input from Council on the timeline and deliverables for the 2025-27 RFFA process and outcomes.

IDENTIFIED POLICY OUTCOMES

The 2018 RTP identifies four priorities for transportation investments. These are:

- a. **Equity** – reduce disparities and barriers faced by communities of color and other historically marginalized communities
- b. **Safety** – reduce fatal and severe injury crashes, particularly focusing on the High Crash Corridor network
- c. **Climate Change** – expand transit and active transportation networks, and leverage emerging technology to meet Climate Smart Strategy goals
- d. **Congestion Relief** – manage congestion and travel demand through low-cost, high value solutions

In their 2019 direction, Metro Council determined these priorities should be emphasized in the 2022-2024 RFFA process.

POLICY QUESTION(S)

Through previous flexible funds allocation processes, the region has directed these dollars to be used to fulfill critical parts of RTP policy. Since these funds may be used on a wide variety of transportation system needs, the approach has been to use them on important system investments where other funding sources are limited or unavailable. These investments fulfill the region's various responsibilities as a Metropolitan Planning Organization (MPO), and to meet mandates to reduce congestion and improve air quality.

There is an established two-step funding framework that has been used to ensure these outcomes are achieved. Step 1 is a series of ongoing investments that ensures a continued focus on region-wide system needs. Step 2 is funding for capital projects and (periodically) strategic one-time investments.

Staff is seeking Council intent on:

1. Continuing the four RTP investment priorities as the foundation of the RFFA program direction;
2. Continuing to maintain the two-step allocation framework;
3. Willingness to consider modifications to the Step 2 capital projects funding category, including the existing priority project categories and the 75/25 funding target split;
4. Any other input to the process or RFFA policy that may better reflect regional priorities.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Previous Councils have indicated support of the two-step allocation framework and directed that funds be invested in a manner that aligns with RTP priorities. Of particular note is that the Step 1 funding is used to pay for transit capital bonds, and to invest in

activities identified in both the state-required Climate Smart Strategies and the federally required Congestion Management Process. Directing funding to be spent elsewhere would result in the region needing to identify other funding to be used to fulfill these obligations.

STAFF RECOMMENDATIONS

N/A

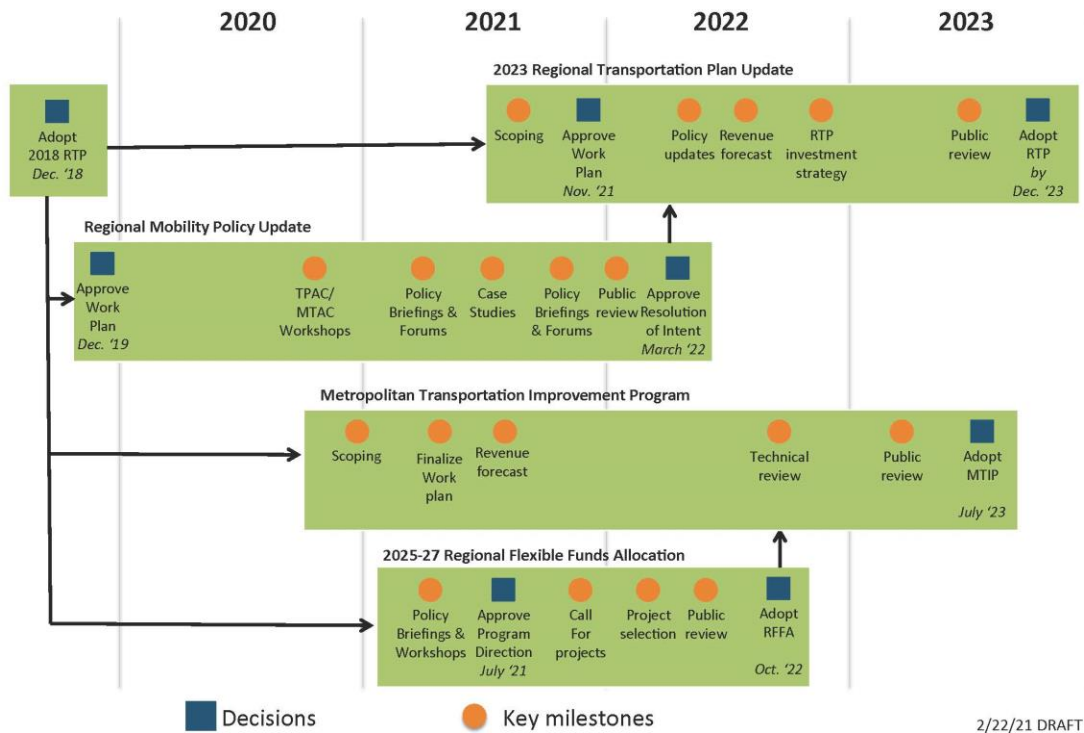
STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

One of Metro's duties as an MPO in carrying out the metropolitan planning process is to allocate federal funds. Every three years, Metro begins a process to allocate funding in three-year timeframes. RFFA funds are allocated to programs and capital projects. The RFFA process generally takes 18-22 months to complete. Capital projects selected in the RFFA process are to be ready for funding obligation during federal fiscal years 2025-2027 and will be included in the 2024-2027 Metropolitan Transportation Improvement Program (MTIP).

As the MTIP is a component of the State Transportation Improvement Program (STIP), the MTIP development timeline is driven largely by the Oregon Department of Transportation (ODOT) timeline for adopting the 2024-2027 STIP. This schedule calls for the draft STIP to be made available for public comment in early 2023. To conform to this timeline, a draft MTIP document must be prepared no later than March of 2023.

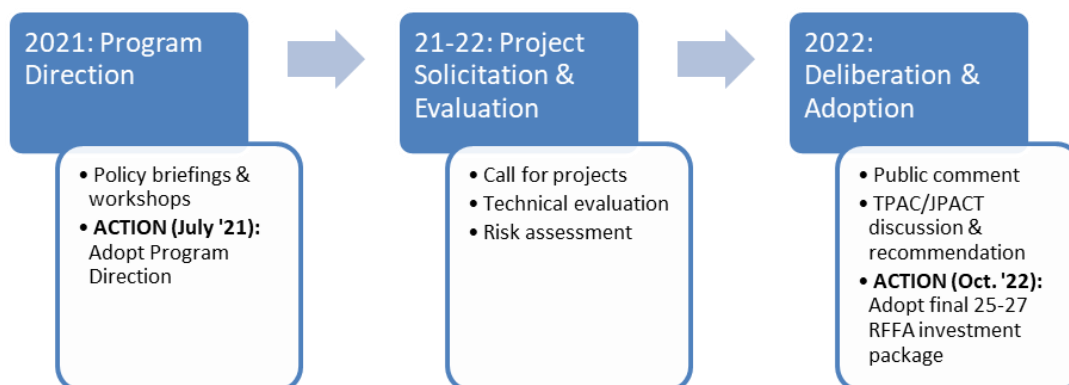
The RFFA and MTIP decisions are one of several planning and investment decisions the region will be making over the next three years, as illustrated below.

Regional Transportation Planning and Investment Decisions | 2020-23



Staff has drafted a RFFA schedule which calls for JPACT and Council to take action on a RFFA investment package in fall 2022. Adhering to this timeline for the RFFA decision is critical to meet the STIP development schedule.

2025-27 RFFA Timeline and Milestones



Existing Two-step RFFA Program Direction

Beginning with the 2014-2015 allocation cycle, the region has followed a two-step framework for how the flexible funds are allocated. Step 1 is comprised of ongoing funding commitments to bond repayment commitments the region has made in previous RFFA cycles, as well as providing continued investment in RTP-identified activities and investments that support federal, state and regional requirements to build a multi-modal transportation system and reduce greenhouse gas emissions from vehicles. Step 2 represents the balance of funding remaining after Step 1 commitments and obligations are met. The current program direction is that Step 2 funding is used for local agency-led capital projects on the regional transportation system.

Step 1 – Step 1 investments currently consist of the following (as defined in the 2022-2024 RFFA program direction):

- **Bond repayment** – Regional flexible funds have been used to help construct the region’s high-capacity transit system. Since 1998, TriMet has issued bonds to pay for project development and capital construction costs of high-capacity transit line construction, based on a regional commitment of flexible funds to repay the bonded debt. This bond obligation covers investments in Green, Orange, and Southwest Corridor MAX lines, Division Transit Project, and the Eastside Streetcar Loop.

In the 2019-2021 RFFA process, JPACT and Metro Council directed regional funding to be used on project development for a selected package of improvements to address 1) regional active transportation needs, and 2) freeway interchanges or arterials that were identified as significant system deficiencies, particularly in the areas of safety and freight delay.

The region’s current obligation to repay bond debt extends to 2034, as detailed in the table below. The bond repayment amount to be repaid through the 2025-2027 RFFA totals \$68.64 million.

Table 1.
Regional bond repayment schedule (in millions)

Year	Transit	Project development	Total
2025	\$21.62	\$1.26	\$22.88
2026	\$21.62	\$1.26	\$22.88
2027	\$21.62	\$1.26	\$22.88
2028	\$17.56	\$1.26	\$18.82
2029	\$17.56	\$1.26	\$18.82
2030	\$17.56	\$1.26	\$18.82
2031	\$17.56	\$1.26	\$18.82
2032	\$17.56	\$1.26	\$18.82
2033	\$17.56	\$1.26	\$18.82
2034	\$17.56	\$1.26	\$18.82

- **Region-wide investments** – Three region-wide investment programs have been defined over time by their regional scope, program administration, and policy coordination, and a consistent allocation of regional flexible funds to support them. The regional programs are a part of Metro’s commitment to the Oregon Department of Environmental Quality to improve air quality and stay in compliance with the Clean Air Act. The three programs are:
 - *Regional Travel Options/Safe Routes to School (RTO/SRTS)* – Grant program that supports local jurisdictional and Non-Government Organization partners’ public outreach and encouragement work, helping people of all ages reduce automobile use and increase travel by transit, ridesharing, bicycling, and walking. Funding also supports research, measurement and partner coordination activities
 - *Transit Oriented Development (TOD)* – Investments to help develop higher-density, affordable and mixed-use projects near transit, to increase the use of the region’s transit system and advance the Region 2040 Growth Concept
 - *Transportation System Management and Operations (TSMO)* – Funding focused on projects and coordination activities to improve the region’s transportation data, traffic signals, traveler information and other technological solutions to help move people and goods more safely, reliably, and efficiently

By investing regional funds in these three areas, the region demonstrates its commitment to and compliance with an overall transportation strategy as defined through the RTP. The RTP identifies several regional policy objectives, and federal and state mandates as shown in Table 2.

Table 2.
Region-wide investment purposes

	Fulfills:
RTO/SRTS	<ul style="list-style-type: none"> • Climate Smart Strategies • Congestion Management Process • State Implementation Plan for Air Quality
TOD	<ul style="list-style-type: none"> • 2040 Growth Concept • Congestion Management Process
TSMO	<ul style="list-style-type: none"> • Climate Smart Strategies • Congestion Management Process

It is program practice that funding for the region-wide investment programs include a three percent annual increase to address inflation costs and maintain purchasing power.

- **MPO and Corridor and System Planning** – Regional funds have been used to support the planning, analysis and management work required of an MPO. JPACT and Metro Council have directed these funds to be spent instead of collecting dues from each partner jurisdiction in the region as was done prior to 1992. Regional funds have also been directed towards continued planning work to further develop regional corridors, transit and freight networks, and to better understand the economic impacts of our transportation investments.

This work plan and schedule assume that, at a minimum, Step 1 funding will continue to repay the bonds and maintain programs and regional planning work.

Step 2 – Beginning in 2014, funding for capital projects has been focused on two investment categories:

1. Active Transportation and Complete Streets (AT)
2. Freight and Economic Development

In creating these two categories during the 2014-2015 RFFA cycle, JPACT and Council directed 75 percent of the Step 2 funding targeted towards the AT category, and the balance to the Freight category. This policy direction reflected the goals and objectives of the existing RTP, and the region's priorities at that time. As explained below, during the last allocation, we heard from stakeholders that the 75/25 split was outdated and no longer met the needs of our regional partners.

Stakeholder feedback from 2022-2024 RFFA process

While these funding categories and respective percentages were supported for several funding cycles after 2014-2015, outcomes of the 2022-2024 allocation indicate there is interest among the region's stakeholders to revisit the Step 2 funding categories and 75/25 funding target split. Factors that led to this interest include:

- The four 2018 RTP investment priorities provided the framework for an updated set of project outcomes used to evaluate projects. Projects from both categories were evaluated using the same criteria, which enabled a direct technical comparison of project outcomes across the categories. (Previous RFFA cycles had different criteria for the AT and Freight categories.) Also, applicants could now request their project be considered for funding from either category. Evaluating the projects using the four priorities, the AT projects generally generated higher technical scores than the Freight projects, indicating the AT projects' greater ability to improve the transportation system in these four areas.
- In the application process, only three projects were originally submitted for consideration in the Freight category. The total amount of funding requested for Freight projects fell far short (\$4.8 million) of the available amount. This indicated difficulty by project partners in identifying and prioritizing freight and economic development transportation projects of scale to the level of funding available.

- Given the ability to evaluate projects from either category against a common set of objectives, a final project funding package included five projects reassigned from the AT funding category that were Freight category eligible to the Freight category. This decision was reached to find a balance between funding projects that best achieved RTP investment priorities in a manner that spent all the available funding.

Stakeholder feedback gathered through and following the 2022-2024 process indicated the Step 2 existing funding categories may not best support the current RTP investment priorities. Stakeholders indicated this as an issue for consideration during this upcoming 2025-2027 RFFA program direction development phase.

BACKGROUND

For the 2025-27 RFFA staff is proposing to follow a multi-phased process similar to that used in preceding RFFA cycles. Briefly, these phases include:

- 1) Program Direction development (January-July 2021) – This phase results in the JPACT-approved and Council-adopted priorities and program direction for how the regional funding is to be spent to carry out policy objectives of the 2018 RTP. This phase assumes engagement activities with Metro Council to discuss their priorities and holding a series of workshops to gather input from stakeholders in addition to discussions with TPAC and JPACT. These workshops are to be held in the March-May 2021 timeframe, specific dates to be determined.

In this phase, initial work also begins on preparing the Step 2 project application, risk assessment and evaluation materials. While many details of the application will be dependent on the final program direction adopted by Council, as much work as possible will occur during this time to ensure the overall RFFA process remains on schedule. Initial work begins on recruiting members of the work group that will evaluate and provide technical scores for each of the Step 2 projects.

After the program direction is adopted, a final set of Step 2 project application materials is developed. The technical evaluation working group will assist in developing the application materials. This work will occur during the summer and fall of 2021.

- 2) Call for projects (November 2021-April 2022) – In Step 2, we plan to ask our local partners to submit applications to fund local capital projects. The project call is scheduled to open in November 2021, with approximately four months allotted for applicants to prepare and submit their project proposals. A workshop to answer questions and provide further details on the RFFA process will be held early in the project call.

Once the application window is closed, work begins to evaluate the submitted projects. Staff will lead two processes to create an objective comparison of the projects:

- Technical Evaluation – a group comprised of agency staff and community members will conduct a technical process to evaluate each project’s performance at achieving policy outcomes as defined in the RTP and the RFFA Program Direction
- Risk Assessment – an independent analysis of each project to identify any impediments to delivery of the candidate project scope, timeline or budget

3) Step 2 Project selection (May-October 2022) – The technical evaluation and risk assessment information are used to help inform the public comment period and county coordinating prioritization process:

- Public Comment – Per federal and Metro guidance, there will be a (minimum) 30-day public comment opportunity to gather input on the proposed projects and overall RFFA program from community members and stakeholders
- Identification of priorities – Each county coordinating committee and the City of Portland has the option to identify which of the projects submitted from their respective jurisdictions are most critical to the needs of the community, utilizing the technical evaluation, risk assessment, and public comments to date

Discussion at TPAC and JPACT is scheduled to occur during the summer of 2022. During this time, Council may wish to be briefed in a work session to discuss and indicate their priorities (if any) to JPACT. Final JPACT and Council action on the Step 2 projects is scheduled for fall of 2022.

ATTACHMENTS

- Memo: Response to Council Work Session on 2022-24 Regional Flexible Funds Allocation
- Resolution 19-4959: 2022-24 Regional Flexible Funds Policy Report
- Resolution 20-5063: 2022-24 Regional Flexible Funds Allocation

[For work session:]

- Is legislation required for Council action? ☐ Yes ☒ No

2022-2024 Regional Flexible Funds Allocation

Resolution No: 20-5063

Step 1: Regional Bond Commitments and Region-wide Program Investments	
Transit + project development bond commitment	\$65,470,000
Corridor and Systems Planning	\$2,047,614
MPO Planning (in lieu of dues)	\$4,329,342
Oregon 2020 Travel & Activity Survey (one-time strategic investment)	\$350,000
Regional Travel Options + Safe Routes to School	\$10,160,243
Transit Oriented Development	\$10,804,264
Transportation System Management and Operations/ITS	\$5,736,295
Total:	\$98,897,758

Step 2: Community Investment Fund			
Active Transportation and Complete Streets			
<u>Project name</u>	<u>Applicant</u>	<u>Sub-region</u>	<u>Amount</u>
122nd Avenue Corridor Improvements	City of Portland	Portland	\$4,543,700
Aloha Safe Access to Transit	Washington County	Washington	\$3,827,559
Courtney Avenue Bike/Ped Improvements	Clackamas County	Clackamas	\$5,079,992
Division Street Complete Street	City of Gresham	E. Multnomah	\$5,240,760
MLK Blvd Safety & Access to Transit	City of Portland	Portland	\$2,623,000
Monroe Street Greenway	City of Milwaukie	Clackamas	\$3,860,788
Stark-Washington Corridor Improvements	City of Portland	Portland	\$5,332,000
Willamette Blvd AT Corridor	City of Portland	Portland	\$4,456,000
Total:			\$34,963,799
Regional Freight and Economic Development Initiatives			
<u>Project name</u>	<u>Applicant</u>	<u>Sub-region</u>	<u>Amount</u>
Clackamas Industrial Area ITS	Clackamas County	Clackamas	\$1,219,815
Cornelius Pass Bike/Ped Bridge (US26)	Washington County	Washington	\$628,110
Council Creek Trail	City of Forest Grove	Washington	\$1,345,950
Cully-Columbia Freight Improvements	City of Portland	Portland	\$3,434,193
Hwy 99E Bike/Ped Improvements	City of Oregon City	Clackamas	\$673,000
Red Rock Creek Trail	City of Tigard	Washington	\$314,055
Sandy Blvd - Gresham to 230th Avenue	Multnomah County	E. Multnomah	\$1,275,985
Trolley Trail Bridge Replacement	City of Gladstone	Clackamas	\$1,228,800
Total:			\$10,119,908

Total 2022-2024 RFFA:	\$143,981,465
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BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ALLOCATING \$143.98)	RESOLUTION NO. 20-5063
MILLION OF REGIONAL FLEXIBLE FUNDING)	
FOR THE YEARS 2022-2024, PENDING)	Introduced by Acting Chief Operating Officer
ADOPTION OF THE 2021-24 MTIP)	Andrew Scott in concurrence with Council
)	President Lynn Peterson

WHEREAS, Metro is the regional government responsible for regional land use and transportation planning under state law and the federally-designated metropolitan planning organization (MPO) for the Portland metropolitan area; and

WHEREAS, approximately \$143.98 million is forecast to be appropriated to the metropolitan region through the federal Surface Transportation Block Grant Program (STBG) and Congestion Mitigation – Air Quality (CMAQ) transportation funding programs; and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per federal regulation 23 CFR 450.324 to allocate these funds to projects and programs in the metropolitan region through the Regional Flexible Fund Allocation (RFFA) process; and

WHEREAS, the Metro Council and JPACT have provided policy guidance to Metro staff to conduct a two-step allocation process, establish the project focus areas of Bond Commitments for Regional High Capacity Transit and Project Development Bond, Region-wide Program Investments, Active Transportation and Complete Streets and Regional Freight and Economic Development Investments, and development of a collaborative process for nominating projects for funding by Metro Resolution No. 19-4959, For the Purpose of Adopting the 2022-2024 Regional Flexible Funds Policy Report for the Portland Metropolitan Area, adopted April 4, 2019; and

WHEREAS, the criteria used to select projects for the 2022-2024 RFFA followed policy direction adopted by Metro Council in the 2018 Regional Transportation Plan by Ordinance No. 18-1421, For the Purpose of Amending the 2014 Regional Transportation Plan (RTP) to Comply with Federal and State Law and Amending the Regional Framework Plan; and

WHEREAS, the 2018 RTP investment policy directed the region to invest in transportation projects which advanced equity, improved safety, carried out the region's Climate Smart Strategy, and provided traffic congestion relief; and

WHEREAS, an extensive regional public process provided opportunities for comments on the merit and potential impacts of the project and program applications between September 6 and October 7, 2019, and is summarized in Exhibit C, attached to this resolution; and

WHEREAS, TPAC has provided recommendations to JPACT and the Metro Council on a list of projects and programs, as shown in Exhibit A, attached to this resolution, to allocate funding in response to policy direction, consistency with Regional Flexible Fund Allocation Policy criteria, local prioritization processes, and public comments; and

WHEREAS, JPACT approved this legislation to submit to the Metro Council for adoption; and

WHEREAS, receipt of these funds is conditioned on completion of requirements listed in Exhibit B to this resolution; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on the project and programs to be funded through the 2022-24 Regional Flexible Fund Allocation process as shown in Exhibit A.

ADOPTED by the Metro Council this 16th day of January, 2020.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

IN CONSIDERATION OF RESOLUTION NO. 20-5063, FOR THE PURPOSE OF ALLOCATING
\$143.98 MILLION OF REGIONAL FLEXIBLE FUNDING FOR THE YEARS 2022-2024,
PENDING ADOPTION OF THE 2021-2024 MTIP

Date: December 10, 2019

Department: Planning & Development

Meeting Date: January 16, 2020

Prepared by:

Dan Kaempff, x. 7559,

daniel.kaempff@oregonmetro.gov

ISSUE STATEMENT

As the metropolitan planning organization (MPO) for the urban area of the Portland region, Metro distributes different sources of federal transportation funds. Two sources of federal transportation funds, the Surface Transportation Block Grant Program (STBG) and the Congestion Mitigation and Air Quality (CMAQ), are allocated at the discretion of the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council. The process of distributing these funds is known as the Regional Flexible Funds Allocation (RFFA). The RFFA is conducted on a three-year funding cycle. The metropolitan region is forecasted to receive \$143.98 million from these sources in the federal fiscal years of 2022-2024. Previous allocations have identified projects and programs to receive funds during the federal fiscal years of 2019-2021.

ACTION REQUESTED

Approve Resolution No. 20-5063, allocating funding to regional investments as recommended by the Joint Policy Advisory Committee on Transportation (JPACT), and detailed in Attachment A.

IDENTIFIED POLICY OUTCOMES

In April 2019, JPACT and Metro Council adopted Resolution 19-4959 which established the policy direction for the 2022-2024 RFFA. In adopting the policy framework for these funds, it was recognized that the region had just concluded an extensive three-year effort that had led to the development of the 2018 Regional Transportation Plan, adopted by JPACT and Metro Council in December 2018 (Ordinance 18-1421). Through that effort, four key regional funding priorities emerged:

- Equity, with a focus on race and income
- Safety
- Climate Smart Strategy implementation
- Managing Congestion

These four priorities were carried forward as the policy outcomes for the 2022-2024 RFFA, recognizing the extensive public outreach effort and agreement among the region's stakeholders that had led to their inclusion in the 2018 RTP.

Part of the project selection process was to conduct a technical analysis on the project proposals to determine their performance with regards to the policy outcomes. This technical analysis measured the projects' potential benefits and outcomes in each of the four policy priority areas, and assigned each a project a numerical score reflective of its merits.

POLICY QUESTION(S)

Should the Metro Council approve the resolution and direct staff to move forward with allocating funding to the selected projects as recommended by JPACT?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Policy options for Metro Council to consider include:

1. Approve the resolution thereby approving the funding allocations and project funding awards as outlined in Attachment A, and conditions of approval as outlined in Attachment B
2. Remand the resolution back to JPACT with direction on desired changes or conditions

STAFF RECOMMENDATIONS

Staff recommends Metro Council approval of Resolution 20-5063.

The package of projects funded through this resolution were selected by JPACT based on their technical performance in achieving outcomes in the four RFFA policy outcomes. In addition to their technical merit, the package follows RFFA policy direction regarding how these funds should be allocated to invest in projects throughout the region and to use them to leverage other investments.

Non-approval or a remand of the package of projects back to JPACT could result in a delay in adoption of the 2021-2024 Metropolitan Transportation Improvement Program (MTIP), due to be adopted by Metro Council later in 2020. The MTIP is the federally approved list of transportation investments in the region and a delay in its adoption could result in the region being unable to spend federal funding until it is approved by the Federal Department of Transportation.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The 2022-2024 RFFA follows transportation policy direction established in the development of the 2018 RTP. Chapter 6 of the RTP provides detail on the region's investment priorities. Projects selected for RFFA funding are on the 2027 Constrained RTP

project list, which identifies the highest priority projects to be funded in the first 10 years of the plan. The RTP project list focuses on making near-term progress on key regional priorities – equity, safety, climate, and congestion.

How does this advance Metro’s racial equity goals?

Advancing equity is a primary policy objective for the RFFA. Projects selected were evaluated on the degree to which they eliminated transportation-related disparities and barriers, and improved access to community assets within RTP Equity Focus Areas. Equity Focus Areas are defined as communities where the rate of people of color, people in poverty and people with low English proficiency is greater than the regional average and double the density of one or more of these populations.

How does this advance Metro’s climate action goals?

Another of the four primary policy objectives for the 2022-2024 RFFA is to advance the region’s Climate Smart Strategy. Projects selected were evaluated based in part on how they could help the region reduce greenhouse gas emissions. The projects funded through the 2022-2024 RFFA are focused on making bicycling and walking easier and safer, and improving and expanding the region’s transit system.

Known Opposition/Support/Community Feedback

A 30-day public comment period was held between September 6 and October 7, 2019. Over 3,000 individuals shared their thoughts and opinions on the 23 projects under consideration for funding. All of the projects received over 50 percent of their responses to an online survey as indicating support by the respondents.

The notice and invitation to participate were distributed through several channels:

- ads in local newspapers (Clackamas Review, Gresham Outlook, Portland Tribune and Tigard Times)
- email invitation through neighborhood association, community planning organization, community participation organization and community-based organization networks
- email invitation to 1,993 subscribers to the Regional Transportation Plan interested persons list
- email to community leaders who had participated in 2018 Regional Transportation Plan discussions, asking them to distribute the invitation through their networks
- Metro News (oregonmetro.gov/news)
- the Metro Twitter feed @oregonmetro

Metro facilitated the discussion and selection of the projects through two transportation-specific Metro advisory committees – the Transportation Policy Alternatives Committee (TPAC) and JPACT. These committees were forums for discussion, coordination, consultation and decision-making by elected officials and their staffs, representing cities and counties of the region, public agencies and transportation providers, including the Oregon Department of Transportation, Oregon Department of Environmental Quality, the Port of Portland, TriMet and South Metro Regional Transit (SMART). TPAC includes

community representatives as regular members, bringing their perspective to those discussions and making recommendations on decisions.

Legal Antecedents

This resolution allocates transportation funds in accordance with the federal transportation authorizing legislation (currently known as Fixing America's Surface Transportation Act or FAST Act) as implemented through the Code of Federal Regulations Title 23, Part 450, Subparts A and C and relevant rules issued by the USDOT. The allocation process is intended to implement the Regional Flexible Fund 2022-2024 program policies as defined by Metro Resolution No. 19-4959, For The Purpose Of Adopting The 2022-2024 Regional Flexible Funds Allocation Policy Report For The Portland Metropolitan Area, adopted April 4, 2019 and Metro Resolution No. 17-4848 For the Purpose of Approving an Increased Multi-Year Commitment of Regional Flexible Funds for the Years 2019-34, Funding the Division Transit Project, Arterial Bottleneck Projects, Active Transportation Projects, and Enhanced Transit Projects, and Authorizing Execution of an Amendment to the Existing Intergovernmental Agreement with TriMet Regarding the Increased Multi-Year Commitment of Regional Flexible Funds.

Anticipated Effects

Adoption of this resolution would direct staff to program funding in the amounts specified to the identified transportation programs and projects into the upcoming 2021-24 Metropolitan Transportation Improvement Program so they may become eligible to receive those federal transportation funds.

Financial Implications (current year and ongoing)

Adoption of the resolution would commit federal grant funding for Metro Transportation Planning activities. These grants are administered on a cost reimbursement basis, requiring Metro to incur costs associated with the planning activities prior to receiving reimbursement thereby incurring carrying costs. Furthermore, the grants require a minimum match from Metro of 10.27% of total costs incurred. Funding for this allocation of grants will occur in Federal Fiscal Years 2022, 2023, and 2024. Federal Fiscal Year 2022 grant funds would typically be utilized by Metro in Metro Fiscal Year 2022-23. Federal Fiscal Year 2023 grant funds would typically be utilized by Metro in Metro Fiscal Year 2023-24. Federal Fiscal Year 2024 grant funds would typically be utilized by Metro in Metro Fiscal Year 2024-25. The Planning and Development Department is able to request advancing the allocation of these funds to an earlier year, however, if there is funding program capacity and budget for local match available.

The proposed allocation would require Metro match of \$236,135 in Metro fiscal year 2022-23, \$243,220 in Metro fiscal year 2023-24 and \$250,516 in Metro fiscal year 2024-25 for transportation planning activities. Additionally, match would be required for the portion of the Regional Travel Options (RTO) program funding utilized for Metro-led expenditures. Approximately 30% of the RTO program funding is currently utilized for this purpose.

BACKGROUND

The RFFA represents the region's direct implementation of the funding priorities defined in the RTP. As the only transportation funding under the purview of JPACT and Metro Council (in their MPO oversight role), these funds have historically been used to invest in elements of the transportation system that advance key policy objectives.

Every three years, the region undergoes a process to affirm the policy direction and select investments to be funded with the Regional Flexible Funds. In April 2019, Metro Council adopted the 2022-2024 RFFA, which created the policy direction for investment of \$143.98 million in federal transportation funds allocated to the region.

Since the 2012-2013 RFFA cycle, the region has followed a two-step approach to allocating these funds. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives. Step 1 provides funding for regional commitments to transit capital and project development bond payments, and continues investments in MPO, system, and corridor planning activities, as well as region-wide programs.

After meeting Step 1 commitments, the remainder of the funding comprises Step 2. This portion of funding is targeted to capital projects that support the region's four RTP investment priorities as detailed above. Step 2 focuses funding on two project categories: Active Transportation and Complete Streets (AT), and Regional Freight and Economic Development Initiatives (Freight). For the past three RFFA cycles, JPACT and Metro Council have adopted project category funding targets of 75 percent to AT projects, and 25 percent to Freight projects.

Historically, the total amount of funding available for Freight projects has been small (\$11.27 million was the Freight target in the current cycle). As such, it has not attracted a large number of proposals, reflecting the low amount of funding available relative to the cost of many Freight projects.

These targets remained in place for the 2022-2024 RFFA process. But through policy discussions with TPAC, JPACT and Metro Council, it was recognized that projects often had benefits in both categories. To address this, applicants were given the ability to request their project be considered in both categories. In order to accommodate this request, staff developed a single application form designed to capture project information that would enable proposals to be compared with each other in both categories.

This resulted in technical ratings that measured how well projects achieved the four policy priorities (Equity, Safety, Climate and Congestion), regardless of in which category(ies) the project had been submitted.

In the Step 2 Call for Projects, a total of 23 project proposals were submitted by the region's eligible agencies. Of these 23 proposals, only three were submitted for consideration in the Freight category. The average technical rating for AT projects was 14.4; the average for the

Freight projects was 9.3 (maximum score possible was 24). Multnomah County submitted two proposals (average score was 10), requesting they be considered in both AT and Freight categories.

Staff presented TPAC with two options for developing a recommendation to JPACT. TPAC indicated their preference for the option which moved certain projects from the AT category into the Freight category. Staff identified five AT projects that are on or adjacent to routes on the Regional Freight Network. Improvements to these roads result in safer conditions for active transportation users and provide benefits to freight mobility and economic development. As such, they could be considered for funding through either category. The TPAC recommendation includes these five projects being considered in the Freight category.

The final JPACT approved package of projects reflects a compromise between multiple sources of input to be considered. The funding package is a balance between policy technical ratings, coordinating committee priorities, assessment of risks to project delivery, public input and other RFFA process policy objectives.

The overall performance of these investments aligns with the regional performance-based and congestion management process, detailed in Appendix L of the 2018 RTP. The Step 1 programs and Step 2 projects selected for funding advance the region's system performance goals and objectives by making communities more walkable, improving access to jobs, improving people's travel choices, reducing greenhouse gas emissions, and making the system safer, more reliable and efficient. Many of the projects funded are either on or adjacent to roads on the regional congestion management network. The 2022-2024 RFFA makes system improvements through dedicating funding to demand and system management strategies, and supporting efficient land use decisions through investments in walking, bicycling, and transit. These modes are prioritized for funding to complement modest expansions of motor-vehicle capacity to meet the access and mobility needs of people and goods in the region.

ATTACHMENTS

Exhibit A: 2022-2024 RFFA list of investments

Exhibit B: 2022-2024 RFFA Conditions of Approval

Exhibit C: 2022-2024 RFFA Public Comment Report

2022-2024 Regional Flexible Funds Allocation

Resolution No: 20-5063

Step 1: Regional Bond Commitments and Region-wide Program Investments	
Transit + project development bond commitment	\$65,470,000
Corridor and Systems Planning	\$2,047,614
MPO Planning (in lieu of dues)	\$4,329,342
Oregon 2020 Travel & Activity Survey (one-time strategic investment)	\$350,000
Regional Travel Options + Safe Routes to School	\$10,160,243
Transit Oriented Development	\$10,804,264
Transportation System Management and Operations/ITS	\$5,736,295
Total:	\$98,897,758

Step 2: Community Investment Fund			
Active Transportation and Complete Streets			
<u>Project name</u>	<u>Applicant</u>	<u>Sub-region</u>	<u>Amount</u>
122nd Avenue Corridor Improvements	City of Portland	Portland	\$4,543,700
Aloha Safe Access to Transit	Washington County	Washington	\$3,827,559
Courtney Avenue Bike/Ped Improvements	Clackamas County	Clackamas	\$5,079,992
Division Street Complete Street	City of Gresham	E. Multnomah	\$5,240,760
MLK Blvd Safety & Access to Transit	City of Portland	Portland	\$2,623,000
Monroe Street Greenway	City of Milwaukie	Clackamas	\$3,860,788
Stark-Washington Corridor Improvements	City of Portland	Portland	\$5,332,000
Willamette Blvd AT Corridor	City of Portland	Portland	\$4,456,000
Total:			\$34,963,799
Regional Freight and Economic Development Initiatives			
<u>Project name</u>	<u>Applicant</u>	<u>Sub-region</u>	<u>Amount</u>
Clackamas Industrial Area ITS	Clackamas County	Clackamas	\$1,219,815
Cornelius Pass Bike/Ped Bridge (US26)	Washington County	Washington	\$628,110
Council Creek Trail	City of Forest Grove	Washington	\$1,345,950
Cully-Columbia Freight Improvements	City of Portland	Portland	\$3,434,193
Hwy 99E Bike/Ped Improvements	City of Oregon City	Clackamas	\$673,000
Red Rock Creek Trail	City of Tigard	Washington	\$314,055
Sandy Blvd - Gresham to 230th Avenue	Multnomah County	E. Multnomah	\$1,275,985
Trolley Trail Bridge Replacement	City of Gladstone	Clackamas	\$1,228,800
Total:			\$10,119,908

Total 2022-2024 RFFA:	\$143,981,465
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Exhibit B to Resolution 20-5063

2022-2024 RECOMMENDED REGIONAL FLEXIBLE FUND GRANTEES CONDITIONS OF APPROVAL

Conditions of approval are mechanisms to that projects are built consistent with the project applications as approved by JPACT and Metro Council, with federal regulations and with regional program policies. Projects can be reviewed at any point in the process for consistency with the conditions of approval and action taken if they are not adhered to.

There are two sets of conditions which apply to projects: 1) conditions which address all projects; and 2) project specific conditions. The conditions for all projects outline expectations for pertaining to the use of funds, project delivery, process, etc. The project-specific conditions outline expectations to create the best project possible. Many of the proposed projects are at different stages of development (e.g. some are in planning phases while others are ready for construction), so some of the same conditions were applied to projects based on the project's stage in development.

Conditions applied to all projects and programs:

1. Funding is awarded to the project as outlined in the JPACT-recommendation and Metro Council adoption for the 2022-24 Regional Flexible Fund Allocation. If any project is determined to be infeasible, or is completed without expending all of the flexible funds awarded, any remaining flexible funds for that project shall revert to the regional pool for the next flexible fund allocation (i.e. 2025-27), to be distributed among the region, per the RFFA policy direction. Or, the project sponsor/local jurisdiction receiving the flexible funds for the project may request reallocation the funds per the MTIP amendment process. Reallocation may necessitate JPACT and Metro Council approval.
2. The award amount is the total amount being provided to deliver the awarded project. The project sponsor/local jurisdiction is expected to resolve any cost overruns or unexpected costs to emerge. It is understood by the project sponsor/local jurisdiction that Metro does not have any further financial commitment/responsibility beyond providing the amount awarded.
3. Project scopes will include what is written in their project application narrative and project refinements in response to comments. Project schedules and budget will include what is determined during the pre-implementation phase to take place after adoption of the 2022-2024 Regional Flexible Fund. Changes in project scopes, schedules, and budget must be requested for adjustments to project and made in writing to the MTIP Project Manager utilizing the amendment procedures adopted in the MTIP (2018-21 MTIP amendment procedures are currently defined in chapter 6). Changes in project scopes must be approved by Metro to ensure the original intent of the project is still being delivered.
4. All projects will follow the design approach and decision-making process as defined in the Designing Livable Streets and Trails Guide (Metro; 3rd edition; October 2019) and any updates in effect at the time a funding intergovernmental agreement is signed. Other street and trail design guidelines, including those developed by local jurisdictions, the National Association of City Transportation Officials, the Institute of Transportation Engineers, the Oregon Department of Transportation, the American Association of State

- Highway and Transportation Officials, and the Federal Highway Administration, may also be referred to as long as the design approach and decision making process used are consistent with Metro's guidelines.
5. All projects with bicycle and pedestrian components will update local network maps and provide relevant bike and pedestrian network data to Metro. Metro will provide guidelines on network data submissions upon request. Additionally, all projects will implement sufficient wayfinding signage. (Ex. Metro's Intertwine Design Guidelines: http://library.oregonmetro.gov/files//intertwine_regional_trail_signage_guidelines.pdf)
 6. All projects with ITS elements will be consistent with National ITS Architecture and Standards and Final Rule (23 CFR Section 940) and Regional ITS Architecture. This includes completing a systems engineering process during project development to be documented through the systems engineering form and submitted to Metro for inventory purposes. For further guidance, consult ODOT's ITS compliance checklist at: <https://www.oregon.gov/ODOT/HWY/ITS/Documents/ITS%20Systems%20Engineering%20Checklist.pdf>
 7. All projects implementing transportation system management and operations (TSMO) elements will provide information to Metro on the TSMO elements for inventory purposes. Metro will provide guidelines on how to provide TSMO data submissions.
 8. All project shall acknowledge Metro as a funding partner. Acknowledgement will attribute credit to Metro on all project materials, such as reports, booklets, brochures, web pages, and social media posts. Attribution on materials must read "Made possible with support from Metro." If marketing is done with audio only, spoken attribution language must be "This project is made possible with support from Metro." The local jurisdiction/sponsor delivering the project will include the Metro logo on all print ads, banners, flyers, posters, signage, and videos. Grantee will include the Metro logo on all marketing and advertising materials, both print and online (size permitting). Metro will provide partners with Metro logos and usage guidelines. Lastly, the local jurisdiction/project sponsor will extend invitations to Metro Councilors to attend events or engagements pertaining to the project.
 9. All projects will meet federal Title VI and Environmental Justice requirements and Metro guidelines for public involvement (as applicable to the project phase, including planning and project development) as self-certified in each application. As appropriate, local data and knowledge shall be used to supplement analysis and inform public involvement. Metro guidelines for public involvement can be found in the Public Engagement Guide Appendix G: Local Engagement and Non-Discrimination Checklist. (http://www.oregonmetro.gov/sites/default/files/final_draft_public_engagement_guide_112113.pdf)
 10. All projects will implement transportation demand management strategies/activities in conjunction with the delivery and opening of the project, in order to enhance the success and performance of the project. If the local jurisdiction/project sponsor does not believe it is relevant to implement a transportation demand management strategy in the delivery and opening of the project, the local jurisdiction/project sponsor must request and receive Metro approval to waive the transportation demand management activities.

11. All projects are expected measure the progress and performance of the Regional Flexible Fund awarded project. Local jurisdictions/project sponsors will identify a set of indicators for data collection and pre-and post-project monitoring. Metro will provide input and feedback into the indicators and datasets, especially to help respond to regional transportation performance measures. Indicators can be determined during the pre-implementation phase of the project.
12. Lead agencies awarded RFFA will comply with ODOT Local Agency Liaison (LAL) project pre-implementation requirements (e.g. completion of detailed scope of work, budget, project prospectus, etc.). The ODOT LAL requirements are expected to be in the proper format as part of the federal delivery process to facilitate MTIP & STIP programming, initiate development and execution of the Intergovernmental Agreement (IGA), and obligate and expend awarded federal funds for the project.

Non-Certified agencies receiving Regional Flexible Funds to deliver a project will be expected to work directly with a certified agency or ODOT to determine the administration and delivery of the project.

The awarded lead agency is required to complete or participate in the following project delivery & monitoring activities:

- Kick-off Meeting Coordination.
- MTIP/STIP programming to a realistic project delivery schedule that accounts for meeting funding obligation targets.
- Participate in project coordination meetings and reviews as called for and scheduled.
- Completing project pre-implementation (Pre- PE or Planning phase obligation) actions and milestones to ensure project proceeds on schedule, including completing a project scoping document with a thorough scope, schedule and budget with milestones and deliverables.
- Complete and execute a project IGA in time to obligate funds as programmed
- Participation in Project Delivery Actions, including attending Project Development Team (PDT) review meetings, completing and submitting project Milestone Reports and Progress Updates, providing any performance measurement project data, providing project delivery status updates, and addressing questions raised by the Metro advisory committees.
- Providing project close-out/final reports and billings.

Conditions applied to specific projects and programs:

Clackamas County - Clackamas Industrial Area ITS

- No additional conditions

Clackamas County - Courtney Avenue Complete Street

- The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562

Forest Grove – Council Creek Trail

- The project will coordinate the abandonment of Portland and Western Railroad with ODOT Rail.
- The project will include a budget for Portland and Western Railroad to review the design.
- The project will provide enhanced pedestrian crossings at all collector and arterial roadways. The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562
- The project will determine the environmental permitting required through coordination with agencies as required DSL, Army Corps, NMFS, DEQ - (not inclusive)
- The project will provide a minimum 14' wide (10' paved with 2' shoulders) multiuse path where feasible. On street connections should provide trail-like separation from traffic where possible. Sidewalks and separated bike lanes (buffered) are acceptable on higher traffic, constrained streets.
- The project partner agency staff will coordinate with TriMet and regional partners to plan for potential future extension within the corridor.

Gladstone – Trolley Trail Bridge Replacement

- The project will provide for a minimum 14' wide (10' paved with 2' shoulders) multiuse path connections to the bridge where feasible. On street connections should provide trail-like separation from traffic where possible.

Gresham - Division Street Complete Street

- Project staff will coordinate with TriMet for all transit improvements.

Milwaukie - Monroe Street Greenway

- As the project develops in coordination with adjacent segments funded from other sources, it should prepare to be able to proceed separately from those segments and issues associated with their funding or permitting, so as to be able to remain on schedule.

Multnomah County – Sandy Boulevard: Gresham to 230th

- An updated project scope, schedule, and budget will be submitted. (assuming integration of 223rd Avenue project development activities are integrated into the project scope)

Portland - 122nd Avenue

- The project will confirm the assumption that improvements will not trigger stormwater/water quality improvements. Bureau of Environmental Services will be included at kickoff meeting and early in design process.
- The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562

- The project will coordinate with TriMet for all transit improvements (signal transit priority, stop locations)
- In addition to the elements described in the application, the project will consider access management and associated design treatments to enhance pedestrian safety.

Portland - Columbia/Cully/Alderwood Freight

- The project will include budget for Union Pacific Railroad to review the design of the crossing.
- Ensure the project is consistent with Metro Regional Freight Plan.

Portland - MLK Blvd.

- The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562.
- In addition to the project elements described in the application, the project will consider access management and associated design treatments to enhance pedestrian safety.

Portland - Stark-Washington Corridor

- The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562
- The project will confirm the assumption that improvements will not trigger stormwater/water quality improvements. Bureau of Environmental Services will be included at kickoff meeting and early in design process.
- The project will involve ODOT Region 1 traffic in the kickoff meeting and early design process for coordination of modification at Interstate 205.
- In addition to the elements described in the application, the project will consider access management and associated design treatments to enhance pedestrian safety.

Portland - Willamette Blvd.

- The project will confirm the assumption that added impervious area for bike path will not trigger stormwater/water quality improvements. Bureau of Environmental Services will be included at kickoff meeting and early in design process.
- The project will pursue a speed limit reduction through the corridor.
- The project will review the enhanced crossing treatment to determine the safest option (possibly include a red indication rather than yellow RRFB) Refer to NCHRP Report 562.

Oregon City - Hwy 99E Bike/Ped Improvements

- The project will involve ODOT Region 1 traffic in the kickoff meeting and early design development process.

Tigard - Red Rock Creek Trail

- Project staff will coordinate with TriMet on the development of and coordination with the Southwest Corridor project and the design of trail connections to transit facilities.

Washington County – Aloha Safe Access to Transit

- The project will coordinate with ODOT Region 1 in the design of project connections to ODOT facilities.

Washington County – Cornelius Pass Bike/Ped Bridge (US26)

- The project will involve ODOT Region 1 traffic in the kickoff meeting and early design development process.



Engagement report

Public comments on proposed projects
for 2022-24 regional flexible funds

October 2019

Exhibit C to Resolution 20-5063

Full document available for download at: <https://www.oregonmetro.gov/RFFA>

IN CONSIDERATION OF RESOLUTION NO. 20-5063, FOR THE PURPOSE OF ALLOCATING
\$143.98 MILLION OF REGIONAL FLEXIBLE FUNDING FOR THE YEARS 2022-2024,
PENDING ADOPTION OF THE 2021-2024 MTIP

Date: December 10, 2019

Department: Planning & Development

Meeting Date: January 16, 2020

Prepared by:

Dan Kaempff, x. 7559,

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ISSUE STATEMENT

As the metropolitan planning organization (MPO) for the urban area of the Portland region, Metro distributes different sources of federal transportation funds. Two sources of federal transportation funds, the Surface Transportation Block Grant Program (STBG) and the Congestion Mitigation and Air Quality (CMAQ), are allocated at the discretion of the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council. The process of distributing these funds is known as the Regional Flexible Funds Allocation (RFFA). The RFFA is conducted on a three-year funding cycle. The metropolitan region is forecasted to receive \$143.98 million from these sources in the federal fiscal years of 2022-2024. Previous allocations have identified projects and programs to receive funds during the federal fiscal years of 2019-2021.

ACTION REQUESTED

Approve Resolution No. 20-5063, allocating funding to regional investments as recommended by the Joint Policy Advisory Committee on Transportation (JPACT), and detailed in Attachment A.

IDENTIFIED POLICY OUTCOMES

In April 2019, JPACT and Metro Council adopted Resolution 19-4959 which established the policy direction for the 2022-2024 RFFA. In adopting the policy framework for these funds, it was recognized that the region had just concluded an extensive three-year effort that had led to the development of the 2018 Regional Transportation Plan, adopted by JPACT and Metro Council in December 2018 (Ordinance 18-1421). Through that effort, four key regional funding priorities emerged:

- Equity, with a focus on race and income
- Safety
- Climate Smart Strategy implementation
- Managing Congestion

These four priorities were carried forward as the policy outcomes for the 2022-2024 RFFA, recognizing the extensive public outreach effort and agreement among the region's stakeholders that had led to their inclusion in the 2018 RTP.

Part of the project selection process was to conduct a technical analysis on the project proposals to determine their performance with regards to the policy outcomes. This technical analysis measured the projects' potential benefits and outcomes in each of the four policy priority areas, and assigned each a project a numerical score reflective of its merits.

POLICY QUESTION(S)

Should the Metro Council approve the resolution and direct staff to move forward with allocating funding to the selected projects as recommended by JPACT?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Policy options for Metro Council to consider include:

1. Approve the resolution thereby approving the funding allocations and project funding awards as outlined in Attachment A, and conditions of approval as outlined in Attachment B
2. Remand the resolution back to JPACT with direction on desired changes or conditions

STAFF RECOMMENDATIONS

Staff recommends Metro Council approval of Resolution 20-5063.

The package of projects funded through this resolution were selected by JPACT based on their technical performance in achieving outcomes in the four RFFA policy outcomes. In addition to their technical merit, the package follows RFFA policy direction regarding how these funds should be allocated to invest in projects throughout the region and to use them to leverage other investments.

Non-approval or a remand of the package of projects back to JPACT could result in a delay in adoption of the 2021-2024 Metropolitan Transportation Improvement Program (MTIP), due to be adopted by Metro Council later in 2020. The MTIP is the federally approved list of transportation investments in the region and a delay in its adoption could result in the region being unable to spend federal funding until it is approved by the Federal Department of Transportation.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The 2022-2024 RFFA follows transportation policy direction established in the development of the 2018 RTP. Chapter 6 of the RTP provides detail on the region's investment priorities. Projects selected for RFFA funding are on the 2027 Constrained RTP

project list, which identifies the highest priority projects to be funded in the first 10 years of the plan. The RTP project list focuses on making near-term progress on key regional priorities – equity, safety, climate, and congestion.

How does this advance Metro’s racial equity goals?

Advancing equity is a primary policy objective for the RFFA. Projects selected were evaluated on the degree to which they eliminated transportation-related disparities and barriers, and improved access to community assets within RTP Equity Focus Areas. Equity Focus Areas are defined as communities where the rate of people of color, people in poverty and people with low English proficiency is greater than the regional average and double the density of one or more of these populations.

How does this advance Metro’s climate action goals?

Another of the four primary policy objectives for the 2022-2024 RFFA is to advance the region’s Climate Smart Strategy. Projects selected were evaluated based in part on how they could help the region reduce greenhouse gas emissions. The projects funded through the 2022-2024 RFFA are focused on making bicycling and walking easier and safer, and improving and expanding the region’s transit system.

Known Opposition/Support/Community Feedback

A 30-day public comment period was held between September 6 and October 7, 2019. Over 3,000 individuals shared their thoughts and opinions on the 23 projects under consideration for funding. All of the projects received over 50 percent of their responses to an online survey as indicating support by the respondents.

The notice and invitation to participate were distributed through several channels:

- ads in local newspapers (Clackamas Review, Gresham Outlook, Portland Tribune and Tigard Times)
- email invitation through neighborhood association, community planning organization, community participation organization and community-based organization networks
- email invitation to 1,993 subscribers to the Regional Transportation Plan interested persons list
- email to community leaders who had participated in 2018 Regional Transportation Plan discussions, asking them to distribute the invitation through their networks
- Metro News (oregonmetro.gov/news)
- the Metro Twitter feed @oregonmetro

Metro facilitated the discussion and selection of the projects through two transportation-specific Metro advisory committees – the Transportation Policy Alternatives Committee (TPAC) and JPACT. These committees were forums for discussion, coordination, consultation and decision-making by elected officials and their staffs, representing cities and counties of the region, public agencies and transportation providers, including the Oregon Department of Transportation, Oregon Department of Environmental Quality, the Port of Portland, TriMet and South Metro Regional Transit (SMART). TPAC includes

community representatives as regular members, bringing their perspective to those discussions and making recommendations on decisions.

Legal Antecedents

This resolution allocates transportation funds in accordance with the federal transportation authorizing legislation (currently known as Fixing America's Surface Transportation Act or FAST Act) as implemented through the Code of Federal Regulations Title 23, Part 450, Subparts A and C and relevant rules issued by the USDOT. The allocation process is intended to implement the Regional Flexible Fund 2022-2024 program policies as defined by Metro Resolution No. 19-4959, For The Purpose Of Adopting The 2022-2024 Regional Flexible Funds Allocation Policy Report For The Portland Metropolitan Area, adopted April 4, 2019 and Metro Resolution No. 17-4848 For the Purpose of Approving an Increased Multi-Year Commitment of Regional Flexible Funds for the Years 2019-34, Funding the Division Transit Project, Arterial Bottleneck Projects, Active Transportation Projects, and Enhanced Transit Projects, and Authorizing Execution of an Amendment to the Existing Intergovernmental Agreement with TriMet Regarding the Increased Multi-Year Commitment of Regional Flexible Funds.

Anticipated Effects

Adoption of this resolution would direct staff to program funding in the amounts specified to the identified transportation programs and projects into the upcoming 2021-24 Metropolitan Transportation Improvement Program so they may become eligible to receive those federal transportation funds.

Financial Implications (current year and ongoing)

Adoption of the resolution would commit federal grant funding for Metro Transportation Planning activities. These grants are administered on a cost reimbursement basis, requiring Metro to incur costs associated with the planning activities prior to receiving reimbursement thereby incurring carrying costs. Furthermore, the grants require a minimum match from Metro of 10.27% of total costs incurred. Funding for this allocation of grants will occur in Federal Fiscal Years 2022, 2023, and 2024. Federal Fiscal Year 2022 grant funds would typically be utilized by Metro in Metro Fiscal Year 2022-23. Federal Fiscal Year 2023 grant funds would typically be utilized by Metro in Metro Fiscal Year 2023-24. Federal Fiscal Year 2024 grant funds would typically be utilized by Metro in Metro Fiscal Year 2024-25. The Planning and Development Department is able to request advancing the allocation of these funds to an earlier year, however, if there is funding program capacity and budget for local match available.

The proposed allocation would require Metro match of \$236,135 in Metro fiscal year 2022-23, \$243,220 in Metro fiscal year 2023-24 and \$250,516 in Metro fiscal year 2024-25 for transportation planning activities. Additionally, match would be required for the portion of the Regional Travel Options (RTO) program funding utilized for Metro-led expenditures. Approximately 30% of the RTO program funding is currently utilized for this purpose.

BACKGROUND

The RFFA represents the region's direct implementation of the funding priorities defined in the RTP. As the only transportation funding under the purview of JPACT and Metro Council (in their MPO oversight role), these funds have historically been used to invest in elements of the transportation system that advance key policy objectives.

Every three years, the region undergoes a process to affirm the policy direction and select investments to be funded with the Regional Flexible Funds. In April 2019, Metro Council adopted the 2022-2024 RFFA, which created the policy direction for investment of \$143.98 million in federal transportation funds allocated to the region.

Since the 2012-2013 RFFA cycle, the region has followed a two-step approach to allocating these funds. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives. Step 1 provides funding for regional commitments to transit capital and project development bond payments, and continues investments in MPO, system, and corridor planning activities, as well as region-wide programs.

After meeting Step 1 commitments, the remainder of the funding comprises Step 2. This portion of funding is targeted to capital projects that support the region's four RTP investment priorities as detailed above. Step 2 focuses funding on two project categories: Active Transportation and Complete Streets (AT), and Regional Freight and Economic Development Initiatives (Freight). For the past three RFFA cycles, JPACT and Metro Council have adopted project category funding targets of 75 percent to AT projects, and 25 percent to Freight projects.

Historically, the total amount of funding available for Freight projects has been small (\$11.27 million was the Freight target in the current cycle). As such, it has not attracted a large number of proposals, reflecting the low amount of funding available relative to the cost of many Freight projects.

These targets remained in place for the 2022-2024 RFFA process. But through policy discussions with TPAC, JPACT and Metro Council, it was recognized that projects often had benefits in both categories. To address this, applicants were given the ability to request their project be considered in both categories. In order to accommodate this request, staff developed a single application form designed to capture project information that would enable proposals to be compared with each other in both categories.

This resulted in technical ratings that measured how well projects achieved the four policy priorities (Equity, Safety, Climate and Congestion), regardless of in which category(ies) the project had been submitted.

In the Step 2 Call for Projects, a total of 23 project proposals were submitted by the region's eligible agencies. Of these 23 proposals, only three were submitted for consideration in the Freight category. The average technical rating for AT projects was 14.4; the average for the

Freight projects was 9.3 (maximum score possible was 24). Multnomah County submitted two proposals (average score was 10), requesting they be considered in both AT and Freight categories.

Staff presented TPAC with two options for developing a recommendation to JPACT. TPAC indicated their preference for the option which moved certain projects from the AT category into the Freight category. Staff identified five AT projects that are on or adjacent to routes on the Regional Freight Network. Improvements to these roads result in safer conditions for active transportation users and provide benefits to freight mobility and economic development. As such, they could be considered for funding through either category. The TPAC recommendation includes these five projects being considered in the Freight category.

The final JPACT approved package of projects reflects a compromise between multiple sources of input to be considered. The funding package is a balance between policy technical ratings, coordinating committee priorities, assessment of risks to project delivery, public input and other RFFA process policy objectives.

The overall performance of these investments aligns with the regional performance-based and congestion management process, detailed in Appendix L of the 2018 RTP. The Step 1 programs and Step 2 projects selected for funding advance the region's system performance goals and objectives by making communities more walkable, improving access to jobs, improving people's travel choices, reducing greenhouse gas emissions, and making the system safer, more reliable and efficient. Many of the projects funded are either on or adjacent to roads on the regional congestion management network. The 2022-2024 RFFA makes system improvements through dedicating funding to demand and system management strategies, and supporting efficient land use decisions through investments in walking, bicycling, and transit. These modes are prioritized for funding to complement modest expansions of motor-vehicle capacity to meet the access and mobility needs of people and goods in the region.

ATTACHMENTS

Exhibit A: 2022-2024 RFFA list of investments

Exhibit B: 2022-2024 RFFA Conditions of Approval

Exhibit C: 2022-2024 RFFA Public Comment Report



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: Friday, January 18, 2019
 To: Metro Council
 CC: Elissa Gertler, Margi Bradway, Ted Leybold
 From: Dan Kaempff, Principal Transportation Planner
 Subject: Response to Council Work Session on 2022-24 Regional Flexible Funds Allocation

At your January 8, 2019 work session, Metro Council discussed the upcoming Regional Flexible Funds Allocation (RFFA) process. In that discussion, Council outlined four policy principles to guide allocation of regional funds, and directed staff to provide additional detail on those principles. Council also directed staff to prepare potential funding initiatives for their further consideration in the policy development and funding process.

Council agreed on four main principles to be followed in development of their policy direction:

1. **The 2018 Regional Transportation Plan priorities are to serve as the RFFA policy framework.** An extensive public engagement process went into the creation of the RTP, as well as numerous meetings and interactive forums with the region's elected officials, business and community leaders. Metro's public outreach efforts resulted in over 19,000 individual communications during the RTP process. From these discussions, an agreement on the region's priorities relative to the transportation has emerged.
2. **The four primary RTP priorities are to be carried out through RFFA project selection.** The RTP contains a broad vision statement, and subsequent supporting goals and objectives that define a transportation system that aligns with the Council-adopted Six Desired Outcomes. Included in this policy direction are four priorities for transportation that JPACT and Metro Council said were the most critical and should be emphasized through our subsequent funding and policy-making activities.
 - a. **Equity** – reduce disparities and barriers faced by communities of color and other historically marginalized communities
 - b. **Safety** – reduce fatal and severe injury crashes, particularly focusing on the High Crash Corridor network
 - c. **Climate Change** – expand transit and active transportation networks, and leverage emerging technology to meet Climate Smart Strategy goals
 - d. **Congestion Relief** – manage congestion and travel demand through low-cost, high value solutions
3. **Maintain the existing two-step framework.** Using the regional dollars strategically has been an underlying goal of previous RFFA processes. Over the past three allocation cycles, the region has allocated funding in two steps. The first step continues our investments in building out the regional high-capacity transit network, and creating a pipeline of sufficiently developed capital projects that are ready for future funding opportunities. Step 1 also supports region-wide investments that make the entire system work more effectively and efficiently, and funds the region's planning efforts.

Step 2 targets project development and construction funding towards capital projects in local jurisdictions that advance RTP policy priorities and that have regional significance.

Council indicated they wished to continue this two-step process, and that the four RTP priorities should be applied to both steps.

4. **Better align Step 2 project outcomes with four RTP priorities.** Council wished to consider and discuss potential ways that Step 2 could be adjusted in order to ensure alignment with the RTP priorities described above. Step 2 projects must result in outcomes consistent with these priorities. As the RFFA financial forecast is finalized, consideration should be given to how any potential funding increase can be used to better enable the region to accomplish these four policy priorities.

Implementation and performance measures

To respond to and advance policy direction defined in the Six Desired Outcomes and the 2018 RTP, Council indicated their intent for the RFFA policy to advance diversity through contracting opportunities associated with these funds.

The 2018 RTP adopted new and updated performance measures to enable the region to better understand the extent to which investments in the transportation system will achieve desired outcomes and provide the best return on public investments. Council directed that projects funded through the RFFA should clearly demonstrate alignment and support of these updated RTP performance measures.

Next Steps

This spring, JPACT and Council are scheduled to consider and take action on the adoption of updated RFFA policy direction to direct investments through the 2022-2024 RFFA funding cycle. Council's principles set forth in this memo will be used as the foundation for discussions with stakeholders leading to development of the updated policy. Metro staff will develop updated RFFA policy and project selection criteria in consultation with TPAC. At their March 1, 2019 meeting, TPAC is scheduled to make a policy recommendation to JPACT. JPACT will consider the TPAC recommendation at their March 21 meeting, and Council is scheduled to consider JPACT's action at their March 28 Council meeting.



2022 – 2024 Regional Flexible Funds Allocation (RFFA) policy report

(Resolution 19-4959, adopted by Metro Council April 4, 2019)

April 2019

oregonmetro.gov/rffa

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Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at www.trimet.org.

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.

The preparation of this policy was financed in part by the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration. The opinions, findings and conclusions expressed in this policy are not necessarily those of the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration.

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INTRODUCTION

As the federally designated Metropolitan Planning Organization (MPO) for the greater Portland, Oregon area, Metro is responsible for administering federal transportation dollars over which the region has allocation authority. Every three years, Metro conducts a process to select specific investments in the region's transportation system to be funded with these dollars. This process is known as the Regional Flexible Funds Allocation (RFFA). The RFFA is one of several activities required of MPOs, others being the development of the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP), and the Unified Planning Work Plan (UPWP).

Through the RFFA process, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council consider how the available funding can be used strategically to address needs identified through the RTP. The RTP establishes the vision, goals and objectives for the Portland region's transportation system, as well as defining performance measures and an investment strategy to ensure progress is made towards creating the envisioned system. In particular, it provides the policy framework to guide how specific sources of transportation funds should be coordinated in order to invest in all parts of the planned system. (This coordination approach is defined through the MTIP Policy Report.)

At the outset of each RFFA cycle, Metro leads a discussion with the region's stakeholders to consider the system's needs, and to develop a policy direction that reflects a consensus on how these funds can best be used strategically to advance important regional priorities. The 2022-2024 RFFA policy framework has now been used for four funding cycles. As such, it is recognized that a more comprehensive review of the RFFA policy should occur in the 2025-2027 cycle.

The policy development phase of the 2022-2024 RFFA cycle occurs directly after a three-year process to develop the 2018 RTP, adopted by JPACT and Metro Council at the end of 2018. In developing the updated RTP, an extensive outreach process resulted in nearly 19,000 individual points of contact with residents, community organizations, businesses, and elected officials.

Through this work with the community, several investment priorities emerged, as defined in Chapter 6.2 of the 2018 RTP. These priorities implement the 2040 Growth Concept by focusing on "moving people and goods, providing access, and helping to create and connect places."¹ Of these priorities, Metro Council determined that the following four were to be the main near-term capital and program investment priorities of the RTP:²

- advancing **Equity**
- improving **Safety**
- implementing the region's **Climate Smart Strategy**
- managing **Congestion**

Along with the adoption of the 2018 RTP, JPACT and Metro Council also adopted updated and new modal and topical strategies for Transportation Safety, Freight, Transit and Emerging Technology in 2018. These strategies more fully articulate the integrated multi-modal regional transportation system and investments needed to improve the existing system, complementing the Regional Travel Options Strategy (2018), Regional Active Transportation Plan (2014), Climate Smart

¹ 2018 Regional Transportation Plan – Chapter 6.2

² Metro Ordinance 18-1421

Strategy (2014) and Regional Transportation System Management and Operations Action Plan (2010). They provide guidance for how the region can thoughtfully direct funding through the RFFA process to advance these four near-term investment priorities.

The 2022-2024 RFFA policy direction builds upon previous RFFA policy established by JPACT and Metro Council. It has been updated to align with new regional policy from the 2018 RTP and the supportive modal and topical strategies, specifically focusing on the four investment priorities noted above. It continues the two-step funding approach adopted for the 2014-2015 allocation cycle, which directs funding towards region-wide investments and supports construction of capital projects in specific focus areas. Unlike previous cycles, the RFFA policy document is now a stand-alone document, separate from the 2021-2024 MTIP Policy Report.³

REGIONAL SIX DESIRED OUTCOMES

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

- **Equity:** The benefits and burdens of growth and change are distributed equitably.
- **Vibrant communities:** People live and work in vibrant communities where their everyday needs are easily accessible.
- **Economic prosperity:** Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
- **Safe and reliable transportation:** People have safe and reliable transportation choices that enhance their quality of life.
- **Clean air and water:** Current and future generations enjoy clean air, clean water and healthy ecosystems.
- **Climate Leadership:** The region is a leader in minimizing contributions to global warming.

The Six Desired Outcomes shape the way in which all regional plans and policies reflect and orient towards achieving the desired outcomes. The 2018 RTP identifies needed next steps to achieve each of the Six Desired Outcomes for the region's transportation system.

2018 REGIONAL TRANSPORTATION PLAN INVESTMENT PRIORITIES

The 2018 RTP serves as the blueprint for the regional transportation system for the next 25 years. It includes specific goals, objectives and priorities for how the region is to invest to develop the system and performance targets to measure progress towards the goals. Projects funded through the 2022-2024 RFFA are to align with the four primary RTP investment priorities, as detailed in RTP Chapter 6.2. The four priorities are:

- **Equity** – reduce disparities and barriers faced by communities of color, people in poverty, and people with low English proficiency
- **Safety** – reduce fatal and severe injury crashes, particularly focusing on the High Crash Corridor network and equity focus areas identified in the RTP
- **Climate** – expand transit, complete regional active transportation networks, and leverage emerging technology to meet Climate Smart Strategy policies
- **Congestion** – manage congestion and travel demand through low-cost, high value solutions

³ Scheduled for JPACT and Metro Council action in 2019

These near-term investment priorities emerged from a three-year discussion and identification of the region's most urgent transportation needs. They guided the development and refinement of the 2018 RTP projects and programs list, and reflect direction from JPACT and Metro Council to prioritize near-term investments to address these priorities.

The 2018 RTP also resulted in updates to the plan's aspirational performance targets. The performance targets are quantitative benchmarks used to assess the region's progress in carrying out the RTP vision through its investment priorities. These performance targets are the highest order evaluation measures in the RTP performance-based policy framework – providing key criteria by which progress towards the plan goals can be assessed. The targets are listed below in Table 1. A complete description of the performance targets is found in Chapter 2 of the 2018 RTP.

Table 1: Regional Transportation Plan Performance Targets⁴

1		AFFORDABILITY Reduce the combined housing and transportation expenditure for lower-income households by 25%, compared to 2015
2		SAFETY Eliminate transportation fatalities and serious injuries for all users by 2035, with a 50% reduction by 2025 and a 16% reduction by 2020, compared to 2015
3		MULTIMODAL TRAVEL Reduce vehicle miles traveled per person by 10%, compared to 2015
4		MODE SHARE Triple walking, biking and transit mode shares, compared to 2015
5		SYSTEM COMPLETION Complete 100% of the regional network of sidewalks, bikeways and trails
6		CONGESTION Meet the Interim Regional Mobility Policy for throughways, arterials and the regional freight network
7		FREIGHT DELAY Reduce vehicle hours of delay per truck trip by 10%, compared to 2040 No Build
8		CLIMATE CHANGE Reduce per capita greenhouse gas emissions from cars and small trucks by 20% by 2035 and 25% by 2040, compared to 2005
9		CLEAN AIR Maintain or reduce air pollution from mobile sources, compared to 2015

⁴ 2018 Regional Transportation Plan, Chapter 2

REGIONAL TRANSPORTATION FINANCE APPROACH (MTIP POLICY 3)

In May 2009, JPACT developed a regional finance approach to direct how the transportation needs of the region are to be addressed by existing or potential transportation funding sources. This regional finance approach provides a starting point for the various funding programs or sources that are addressed in the MTIP and State Transportation Improvement Program (STIP).

The approach identifies funding mechanisms agencies use and a regional strategy for sources to be pursued to address unmet needs of the different elements of transportation system in the region. The approach has been utilized in the development of RFFA policies since the 2010-2013 MTIP cycle and updated as needed to reflect current planning policy and available funding opportunities. The 2022-2024 RFFA policy follows the most recent regional finance approach adopted as part of the 2021-2024 MTIP.⁵

Uses for regional flexible funds, as defined in the 2021-2024 MTIP policy include:⁶

- Active Transportation
- Arterial Expansion, Improvements, and Reconstruction⁷
- Throughway Expansion⁸
- High-capacity Transit Expansion
- Transportation System Management and Operations
- Regional Travel Options
- Transit Oriented Development

REGIONAL FLEXIBLE FUND ALLOCATION OBJECTIVES

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

1. Select projects from throughout the region; however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring State Implementation Plan for air quality requirements are met and that an adequate pool of CMAQ-eligible projects is available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.

⁵ See Metro Council Resolution 16-4702

⁶ MTIP policy pending adoption by JPACT in April 2019. RFFA policy will be adjusted to mirror final adopted MTIP policy.

⁷ Limited to arterial freight facilities for ITS, small capital projects, and project development.

⁸ Limited to project development with large discretionary funding leverage opportunities to address multiple transportation issues around the mainline facilities, focusing on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

6. Encourage the application of projects that efficiently and cost-effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an area's stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.
9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

2022-2024 REGIONAL FLEXIBLE FUNDS STRUCTURE

The 2022-2024 RFFA follows the two-step framework the region has followed starting with the 2014-2015 allocation. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives.

Step 1 – Regional Commitments

a. Bond commitments for regional high capacity transit and project development

Regional flexible funds have been used to help construct the region's high-capacity transit system. Since 1998, TriMet has issued bonds to pay for project development and capital construction costs of high-capacity transit line construction, based on a regional commitment of flexible funds to repay the bonded debt. The region's current obligation to repay bond debt extends to 2034. This bond obligation covers investments in Green, Orange, and Southwest Corridor MAX lines, Division Transit Project, and the Eastside Streetcar Loop.

In the 2019-2021 RFFA process, JPACT and Metro Council directed regional funding to be used to develop a selected package of improvements to address regional active transportation needs, and freeway interchanges or arterials that were identified as significant system deficiencies, particularly in the areas of safety and freight delay.

Regional flexible funds were used in a manner consistent with the Regional Transportation Finance Approach that targets these funds to the connecting arterial portions of freeway interchange projects and Active Transportation projects. For projects coordinated with freeway mainline and associated interchange elements, flexible funds were invested as a part of a multi-agency approach to addressing multiple transportation issues around the mainline facilities, and focused on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

The regional bond commitments through 2034 for transit and project development are shown below in Table 3.

Table 3: Regional bond commitment repayment schedule (millions)

	Transit bond commitment	Project development bond commitment	Total bond commitment
2022	\$21.62	\$1.26	\$22.88
2023	\$21.62	\$1.26	\$22.88
2024	\$21.62	\$1.26	\$22.88
2025	\$21.62	\$1.26	\$22.88
2026	\$21.62	\$1.26	\$22.88
2027	\$21.62	\$1.26	\$22.88
2028	\$17.56	\$1.26	\$18.82
2029	\$17.56	\$1.26	\$18.82
2030	\$17.56	\$1.26	\$18.82
2031	\$17.56	\$1.26	\$18.82
2032	\$17.56	\$1.26	\$18.82
2033	\$17.56	\$1.26	\$18.82
2034	\$17.56	\$1.26	\$18.82

Bond repayment commitments for the 2022-2024 RFFA cycle are:

Transit and Project Development Bond Commitment **\$68.64 million**

b. Region-wide program investments

Three region-wide programs have been defined over time by their regional scope, program administration, and policy coordination, and a consistent allocation of regional flexible funds to support them. The three programs are:

- **Regional Travel Options** – Grants to local partners that support public outreach and encouragement, to help people reduce automobile use and travel by transit, ridesharing, bicycling or walking, and to build a coordinated regional Safe Routes to School program
- **Transit Oriented Development** – Investments to help develop higher-density, affordable and mixed-use projects near transit, to increase the use of the region’s transit system and advance the Region 2040 Growth Concept
- **Transportation System Management and Operations** – Capital funding focused on improving the region’s transportation data, traffic signals, traveler information and other technological solutions to help move people and goods more safely, reliably, and efficiently

Funding targets are set for the existing region-wide programs in this cycle based on their historical allocation levels which includes an annual increase to address increasing program costs and maintain purchasing power. The region-wide programs will be reviewed prior to the final funding decision scheduled for the fall of 2019. The review will provide the following information about each program:

- Program description – description of the program purpose and its major activities
- Regional Funding Strategy Context – description of why the program is appropriate for regional flexible funding, per the Regional Finance Approach

- Directly related RTP performance targets – description of how the program helps the region meet performance targets in the RTP
- Connection to other plans or strategies – description of how program investments are linked to addressing other planning requirements (for example, the State Implementation Plan for air quality)
- Program strategic plan or recent planning work completed to date – description of how the strategic plan helps set priorities for implementation
- Program performance to date – description of specific accomplishments of the program
- Additional opportunities – description of priorities or activities the program would pursue given additional resources

Region-wide program investments for the 2022-2024 RFFA cycle are:

Regional Travel Options (RTO)	\$10.16 Million
Transit Oriented Development (TOD)	\$10.80 Million
Transportation System Management and Operations (TSMO)	\$ 5.74 Million

c. MPO, and Corridor and System Planning

Regional funds have been used to support planning, analysis and management work required of a MPO. JPACT and Metro Council have directed these funds to be spent instead of collecting dues from each partner jurisdiction in the region as was done prior to 1992. Regional funds have also been directed towards continued planning work to further develop regional corridors, transit and freight networks, and to better understand the economic impacts of our transportation investments.

Planning commitments for the 2022-2024 RFFA cycle are:

MPO Planning (in lieu of dues)	\$ 4.33 Million
Corridor and System Planning	\$ 2.05 Million

d. One-Time Strategic Investments

Periodically the region uses regional funds to pay for transportation needs that are not ongoing, but reflect a strategic investment that helps support the goals and objectives of the RTP. In this cycle, funding is directed towards the region's contribution to the Oregon 2020 Travel and Activity Survey. This statewide survey provides MPOs with updated information on travel behaviors occurring within their metropolitan areas. This, in turn, updates the data used in the region's travel demand model and provides decision-makers with analytically valid information to be used in policy and investment decisions.

One-Time Strategic Investments	\$ 0.35 Million
---------------------------------------	------------------------

Step 2 – Capital Investments

The 2014-2015 RFFA policy direction established two Step 2 funding categories which best reflected the region's needs and were guided by the Regional Finance Approach as defined in the MTIP policy. The Step 2 categories are:

- **Active Transportation and Complete Streets**
- **Regional Freight and Economic Development Initiatives**

75 percent of the funding available in Step 2 is directed to the Active Transportation and Complete Streets category, the other 25 percent is directed to the Regional Freight and Economic Development Initiatives category.

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

- A topically or geographically focused impact rather than an array of disconnected projects
- Achieves appreciable impacts on implementing a regional scale strategy given funding amount available
- Addresses specific outcomes utilizing the 2018 Regional Transportation Plan Performance Targets
- Prioritizes catalytic investments (leveraging large benefits or new funding)
- Positions the region to take advantage of federal and state funding opportunities as they arise

In the development of the 2014-15 RFFA, a task force was created to advise JPACT and TPAC on project focus area needs, priorities and project prioritization factors and developed direction for the specific project focus areas. This policy construct will continue in the 2022-2024 RFFA but with adjustments which respond to the 2018 RTP investment policy direction and input received as a part of this policy update process.

While projects funded through the Step 2 categories are to be designed and scoped in a manner reflective of the relevant category's focus area and intended purpose, it is recognized that well-designed projects may result in multiple outcomes. Consideration will be given in the technical evaluation for projects that demonstrate significant outcomes and benefits beyond the primary project purpose.

Example: A project funded through the Freight category that improves freight access to a certain area will likely also include active transportation elements. Preferred project design will incorporate a higher level of active transportation improvements than the minimum required project elements (protected bikeways, wider than standard sidewalks, traffic calming, crosswalks with flashing beacons, etc.

Similarly, an Active Transportation project on a facility that has significant freight traffic will likely include elements to improve the reliability of freight movement and elements to address the safe interface between active transportation and freight movements.

Per RTP Equity Policy 7, projects and programs funded through the RFFA should demonstrate support of family-wage job opportunities and a diverse construction workforce through inclusive hiring practices and contracting opportunities for investments in the transportation system.

ACTIVE TRANSPORTATION AND COMPLETE STREETS

Recommended approach for developing projects

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

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

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

Table 4: Active Transportation and Complete Streets Criteria

RTP investment priorities for RFFA	Criteria
Equity	<p>Purpose: Helps eliminate transportation-related disparities and barriers within RTP Equity Focus Areas⁹</p> <p>Improves access by completing active transportation network gaps in RTP Equity Focus Areas¹⁰</p> <p>And/Or</p> <p>Improves access (whether by service/travel time reliability or through physical infrastructure) to and from the following community assets:</p> <ul style="list-style-type: none"> • Affordable housing • Community places • Employment areas • Title 1 schools (or equivalent)¹¹
Safety	<p>Purpose: Eliminate fatal and severe injury crashes among pedestrians, cyclists and transit users on a Regional High Injury corridor, or at a designated “hotspot”¹²</p> <p>Improves safety with one or more effective safety countermeasure(s) or other technical solutions that:</p> <ul style="list-style-type: none"> • Reduce vehicle speeds • Separate modes • Reduce conflicts between freight and vulnerable users • Implement ADA accessibility • Implement recommendations from documented safety problem/plan

⁹ Equity Focus Areas are defined as communities where the rate of people of color, people in poverty and people with low English proficiency is greater than the regional average and double the density of one or more of these populations. 2018 RTP, Chapter 3.2.2

¹⁰ This can include first/last mile network gaps to transit, infill gaps in an equity focus area co-located on the regional active transportation network, increased connectivity, etc.

¹¹ A school may meet all of the qualification criteria for Title 1 status, but not have that designation due to funding constraints or other considerations.

¹² Identified by Safety Priority Index System (SPIS) or similar method of identifying crash frequency, rate and severity.

RTP investment priorities for RFFA	Criteria
Climate	<p>Purpose: Complete a regional active transportation network gap(s)</p> <p>Project demonstrates how it will reduce transportation-related greenhouse gas emissions through:</p> <ul style="list-style-type: none"> • Reducing or eliminating VMT • Improving transit reliability and travel times/reduces transit delay on Regional Transit Network frequent bus and ETC corridors • Including green infrastructure element in project design
Congestion	<p>Purpose: Incorporate congestion management strategies to provide or improve alternatives to drive-alone trips</p> <p>Project removes barriers or creating access to transit and/or active transportation through:</p> <ul style="list-style-type: none"> • Improving network connectivity • Actively managing and optimizing arterial network to support biking and walking and reducing transit delay • Serving Region 2040 Centers, or high density/projected high growth areas

REGIONAL FREIGHT AND ECONOMIC DEVELOPMENT INITIATIVES

Recommended approach for developing projects

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

Construction focus

Capital improvement proposals will focus on:

- System management, such as Intelligent Transportation Systems (ITS), on arterial freight routes. This could include upgrading traffic signal equipment and timing or provide travel information to inform freight trip decisions.
- Small capital projects (e.g. spot widening, installation of mountable curbs to accommodate large truck turning movements, etc.).

Technical measures should be developed that assess the regional impacts of nominated projects such as improving access to regionally significant industrial land or safe movements to/on the regional freight network to ensure a regional interest is served by the project.

Project proposals should demonstrate how the project supports job and economic growth in one or more traded sector industry clusters, as defined in the 2018 RTP.¹³

Planning/strategy development focus

Planning and strategy development proposals will focus on:

- Project development for specific arterial freight routes would evaluate key transportation barriers to the development of traded sector industry clusters, and recommend operations and design improvements to address those barriers.
- Consideration and development of regional strategies to invest in transportation improvements, focused on freight movement and increased job growth in traded sector industries

¹³ 2018 RTP, Chapter 4.5.1

Table 5: Regional Freight and Economic Development Initiatives Criteria

RTP investment priorities for RFFA	Criteria
Equity	<p>Purpose: Supports economic development in traded sector industries by creating jobs, and improving access to job centers¹⁴ and Title 4 industrial employment areas, particularly for RTP Equity Focus Areas¹⁵</p> <p>Reduces impacts to RTP Equity Focus Areas (e.g., reduced noise, land use conflict, air toxics and/or particulate matter emissions)</p>
Safety	<p>Purpose: Eliminate fatal and severe injury crashes by:</p> <ul style="list-style-type: none"> • Removing and mitigating conflicts with <ul style="list-style-type: none"> ○ active transportation ○ railroad crossings ○ turn movements ○ other identified safety issues • Improving safety with one or more effective safety countermeasure(s) or other technical solutions that <ul style="list-style-type: none"> ○ reduce vehicle speeds ○ separate modes ○ reduce conflicts between freight and vulnerable users ○ implement ADA accessibility ○ implement recommendations from documented safety problem/plan
Climate	<p>Purpose: Reduces greenhouse gas emissions</p> <ul style="list-style-type: none"> • Includes ITS or other technological elements to improve efficiency and hot-spot emissions from idling • Uses Complete Streets design; green infrastructure, closing active transportation network gap, etc. • Geometric designs and other operational elements to improve truck flow and bottlenecks on regional freight network¹⁶

¹⁴ Mixed-use areas, and designated 2040 Growth Concept industrial areas.¹⁵ As defined in 2018 RTP Chapter 3.2.2¹⁶ Without degrading pedestrian and bicycle safety and comfort.

RTP investment priorities for RFFA	Criteria
Congestion	Purpose: Reduces freight vehicle delay at industrial centers and freight sites (intermodal hubs, terminals, distribution centers, et al) <ul style="list-style-type: none"> • Improves network connectivity for all modes • Improves reliability and access to regional freight network • Reduces need for roadway expansion

Step 2 project funding targets for the 2022-2024 RFFA cycle are:

Active Transportation and Complete Streets: **\$29.74 Million**
Regional Freight Initiatives: **\$9.91 Million**

TOTAL Step 2: **\$39.65 Million**

Table 6: Total Available 2022-2024 Regional Flexible Funds

Step 1	
Transit & Project Development Bond Commitment	\$68.64 million
Region-wide Program Investments, Planning	\$33.08 million
One-Time Strategic Investments	\$0.35 million
Step 2	
Active Transportation & Complete Streets	\$29.74 million
Regional Freight & Economic Development Initiatives	\$9.91 million
Total 2022-2024 RFFA	\$141.72 million

STEP 2 PROJECT SELECTION PROCESS

All project funding proposals submitted through the Step 2 Call for Projects will be considered for selection using the following process:

Call for Projects – Metro will issue a call for project proposals within the two Step 2 funding categories in early April, 2019. Proposals will be due in early June. A workshop will be held early in the project call timeframe to provide direction to applicants and respond to questions.

Technical Evaluation – Proposals will receive a technical score reflecting how well the project addresses the relevant category criteria. In addition to this quantitative analysis, the technical report will also include qualitative information to reflect attributes about each project that may not be reflected in a strict numerical score.

By presenting both quantitative and qualitative information, decision-makers and the public can better understand the technical merits of projects, which will help to better inform the regional decision making process.

Risk Assessment – To ensure that RFFA-funded projects can be delivered as proposed, on time, and within budget, Metro will conduct a risk assessment process on each proposal, and issue a report documenting the findings of the process. Proposals will be evaluated on how completely the project has been planned, developed and scoped, and measure the risk of project completion within the 2022-2024 timeframe.

This report will be made publically available and used as a part of the regional decision-making process.

The Technical Evaluation and Risk Assessment processes will occur concurrently in June-August.

Public Comment – Following issuance of the Technical Evaluation and Risk Assessment reports, Metro will conduct a 30-day public comment period in September, focusing on outreach to community and neighborhood organizations, county coordinating committees and other stakeholders. A joint public meeting of JPACT and Metro Council is planned to give decision-makers the opportunity to hear public testimony on project proposals. A summary of input received through the public comment period will be made available along with the Technical Evaluation and Risk Assessment reports to inform the final RFFA decision making process.

County Coordinating Committee/City of Portland Recommendations – Each county coordinating committee and the City of Portland will have the opportunity to provide recommendations to decision-makers on which projects submitted from their jurisdictions best reflect their local priorities. Recommendations are to be provided to TPAC and JPACT in advance of the JPACT meeting on November 21, 2019.

TPAC/JPACT Discussion and Action – Following the above information gathering steps, TPAC will be asked to consider and discuss all of the input received, and to provide a recommendation to JPACT on a package of projects to be funded, including both Step 1 and Step 2 investments.

JPACT will consider and discuss the TPAC recommendation, and will be requested to take action to refer a package of projects to Metro Council. JPACT action is scheduled for December 19, 2019.

Council Action – Metro Council will consider and take action on the JPACT-referred package in January 2020.

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.

Metro Council President

Lynn Peterson

Metro Councilors

Shirley Craddick, District 1

Christine Lewis, District 2

Craig Dirksen, District 3

Juan Carlos Gonzalez, District 4

Sam Chase, District 5

Bob Stacey, District 6

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April 4, 2019

Materials following this page were distributed at the meeting.

2025-2027 Regional Flexible Funds Allocation (RFFA)

Metro Council Work Session
March 9, 2021



Metro



Today's purpose

- Background
- RFFA process
- Request for Council direction





Metro

Background

What are Regional Flexible Funds?

- Federal transportation dollars allocated to each Metropolitan Planning Organization (MPO)
- Surface Transportation Block Grant (STBG), Congestion Mitigation & Air Quality (CMAQ)
- ~5% of all transportation funding in region
- Approximately \$144M allocated in 2022-24

Three MPO functions

1. Maintain Regional Transportation Plan (RTP)
2. Develop Metropolitan Transportation Improvement Program (MTIP)
3. Allocate funding through an open process (RFFA)

2018 RTP investment priorities



Equity



Climate



Safety



Congestion

Step 1 Bond commitments



MAX Green Line



Eastside Streetcar



MAX Orange Line

Step 1 Regionwide Investments

Transportation System Management & Operations (TSMO)



Transit Oriented Development (TOD)



Regional Travel Options (RTO)/
Safe Routes to School (SRTS)



Jonathan Maus/BikePortland

Purposes

	Fulfills:
Regional Travel Options/Safe Routes to School	<ul style="list-style-type: none">• Climate Smart Strategies• Congestion Management Process• State Implementation Plan for Air Quality
Transit Oriented Development	<ul style="list-style-type: none">• 2040 Growth Concept• Congestion Management Process• State Implementation Plan for Air Quality
Transportation System Management & Operations	<ul style="list-style-type: none">• Climate Smart Strategies• Congestion Management Process

Step 1 Regional planning

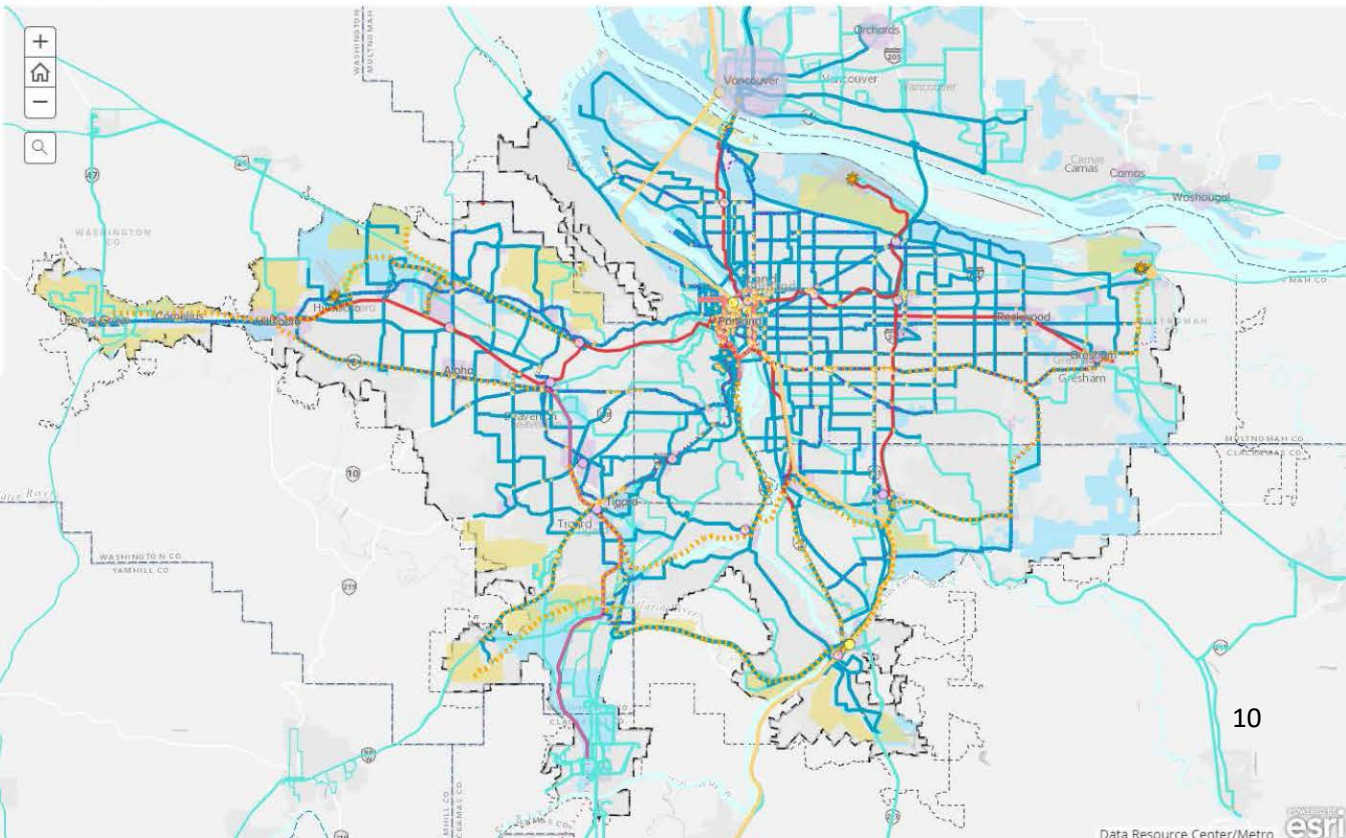
2018 RTP Network maps

Designed in Oregon by Metro     Metro

Introduction Motor Vehicle **Transit** Freight Bike Pedestrian Regional Design

- Light rail transit
- Commuter Rail
- Streetcar
- HCT in progress
- Future HCT*
- Intercity high speed rail
- Enhanced transit connector
- Frequent Bus
- Regional Bus
- Bus service outside MPA
- Major bus stop
- Transit center
- Intercity rail terminal
- Air terminal
- Bus station
- Community/Jobs Connector
- Urban center
- Employment/Industrial area
- Urban growth boundary
- Metropolitan Planning Area
- County boundary

*Includes Bus Rapid Transit, Rapid Streetcar, Light Rail and Commuter Rail. Dotted lines represent future plans and not specific alignments. Bus route geometry is based on modeled networks and may not be geometrically accurate.



Step 2 Active Transportation



Step 2 Active Transportation



Fanno Creek Trail



Gresham-Fairview Trail



Eastbank Esplanade



BIKETOWN



Trolley Trail

Step 2 Freight



Hunziker St, Tigard



Rivergate Blvd, Portland



Metro

RFFA process

2025-27 RFFA process timeline

2021: Program Direction

Council work session: Mar. 9

Public workshops:
Mar. 10, Apr. 8, Apr. 26

TPAC:
Feb. 5, Apr. 2, May 7
June 4: recommendation

JPACT:
Mar. 18, May 20
July 15: action

Council:
July/Aug.: action

2021-22: Step 2 Project Solicitation & Evaluation

Project call:
November 2021

Proposals due:
February 2022

Technical Analysis,
Risk Assessment:
March, April

2022: Deliberation & Adoption

Public comment,
CCC priorities:
May, June

TPAC/JPACT discussion:
June-Sept.

JPACT
recommendation,
Council action: Oct.

RFFA Program Direction development

- Region's intent of how to target regional funds to achieve RTP priorities
- Sets objectives for allocation process
- Defines funding categories, amounts (Steps 1 & 2)



2022 – 2024 Regional
Flexible Funds Allocation
(RFFA) policy report

(Resolution 19-4959, adopted by Metro Council April 4, 2019)

April 2019

oregonmetro.gov/rffa

2022-2024 RFFA framework

Step 1 (ongoing
investments)
\$98.9M

- Transit capital construction bonds
- Active Transportation project development bonds
- Regionwide transportation investments
- MPO, Corridor & System planning

Step 2 (capital
projects)
\$45.1M

- Active Transportation (75%)
 - ⑩ Complete streets
 - ⑩ Trails
- Freight (25%)

2022-2024 RFFA retrospective

- Review of process, outcomes
- Stakeholder survey responses
- Helps inform the 25-27 allocation
 - Identify Program Direction discussion topics
 - Improve overall allocation process

2024-2024 RFFA outcomes

- High interest in AT category; low in Freight
- AT projects generally performed better at achieving Four Priorities
- Discuss Step 2 - do these categories still reflect highest regional need for project funds?

Requesting Council direction

1. Continuing the four RTP investment priorities as the foundation of the RFFA program direction
2. Continuing to maintain the two-step allocation framework
3. Willingness to consider modifications to the Step 2 capital projects funding category, including the existing priority project categories and the 75/25 funding target split
4. Any other input to the process or RFFA policy that may better reflect regional priorities

Thanks!

Contact: Dan Kaempff
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