



600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, June 4, 2021
Time: 9:30 am – 12:00 noon
Place: Virtual meeting – The recording of the public meeting requires consent by participants

<https://us02web.zoom.us/j/89311439152?pwd=RGtEZkRROE54MU51T3BRam900TZXQT09>
Passcode: 349970
Phone: 888-475-4499 (Toll Free)

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| 9:30 am | 1. | Call meeting to order <ul style="list-style-type: none">• Declaration of a Quorum• Introductions | Tom Kloster, Chair |
| 9:35 am | 2. | * Comments From The Chair And Committee Members <ul style="list-style-type: none">• Committee input form on Creating a Safe Space at TPAC (Chair Kloster)• Updates from committee members around the Region (all)• Fatal crashes update & Safety Forum Recap (McTighe)• US DOT's Rebuilding American Infrastructure with Sustainability & Equity (RAISE) grants announcement (Leybold/Winter) | Tom Kloster, Chair |
| 9:45 am | 3. | Public Communications On Agenda Items | |
| 9:48 am | 4. | * Consideration of TPAC Minutes, May 7, 2021 (action item) | Tom Kloster, Chair |
| 9:50 am | 5. | * Metropolitan Transportation Improvement Program (MTIP) Formal Amendment 21-5182 (action item, Recommendation to JPACT) Purpose: For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Complete the Reprogramming of Unified Planning Work Program (UPWP) Annual Program Estimates Impacting Metro, Plus Amend, Add, or Cancel Several Projects Impacting ODOT and TriMet to Address their Next Federal Approval Step (JN21-11-JUN) | Ken Lobeck, Metro |
| 10:05 am | 6. | * 2024-2027 MTIP Revenue Forecast (discussion item) Purpose: To provide TPAC an overview of the revenue forecast for the 2024-2027 MTIP and obtain feedback on forecast methods for the Regional Flexible Fund element of the MTIP revenue forecast. | Ted Leybold, Metro Grace Cho, Metro |
| 10:25 am | 7. | * 2025-27 Regional Flexible Funds Allocation (RFFA) Strategic Direction (action item, Recommendation to JPACT) | Dan Kaempff, Metro |
| 11:10 am | 8. | * Regional Congestion Pricing Study – draft findings and recommendations (discussion item) | Elizabeth Mros-O'Hara Metro |
| 11:40 am | 9. | * 2024-27 ODOT Administered Funding – Program Allocations and Scoping Updates (discussion item) | Chris Ford, ODOT Jon Makler, ODOT |
| 11:55 am | 10. | Committee Comments on Creating a Safe Space at TPAC (discussion item) | Tom Kloster, Chair |
| 12:00 pm | 11. | Adjournment * Material will be emailed with meeting notice | Tom Kloster, Chair |

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

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Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntauw tsis txaus siab, mus saib www.oregonmetro.gov/civilrights. Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntxov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwm ua ntej ntawm lub rooj sib tham.

2021 TPAC Work Program

As of 5/28/2021

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



Metro

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

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| <p>June 4, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Fatal crashes update & Safety Forum Recap (Lake McTighe) • Rebuilding American Infrastructure with Sustainability & Equity (RAISE) grants (Leybold) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-5182 <u>Recommendation to JPACT</u> (Lobeck, 15 min) • 2024-2027 MTIP Revenue Forecast (Ted Leybold, Grace Cho, 20 min) • 2025-27 RFFA Strategic Direction <u>Recommendation to JPACT</u> (Kaempff, 45 min) • Regional Congestion Pricing Study – draft findings and recommendations (Elizabeth Mros-O’Hara; 30 min) • 2024-27 ODOT Administered Funding-Program Allocations & Scoping updates (Chris Ford; 15 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) | <p>June TPAC workshops</p> <p>June 23: TPAC/MTAC workshop, 10 am – noon</p> <ul style="list-style-type: none"> • State Economic & Revenue Forecast (Mark McMullen, Josh Lehner, Oregon Office of Economic Analysis, 45 min) • Regional Mobility Policy Update (Kim Ellis, Metro/Lidwien Rahman, ODOT, 45 min) |
| <p>July 9, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min) • Regional Congestion Pricing Study, Final Report – Resolution 21-**** <u>Recommendation to JPACT</u> (Elizabeth Mros-O’Hara; 20 min) • Regional Mobility Policy Update: Draft Elements & Measures to Test <u>Recommendation to JPACT</u> (Kim Ellis, Metro/Lidwien Rahman, ODOT; 45 min) • Regional Freight Delay & Commodities Movement Study Policy Framework (Tim Collins, 30 min) • 2024-27 ODOT Administered Funding-Program Allocation & Scoping updates (Chris Ford; 15 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) | <p>July TPAC workshops</p> <p>July 14, 2021: TPAC workshop, 10 am – noon</p> <ul style="list-style-type: none"> • Metro Legislative Session Recap update (Anneliese Koehler, Metro; 30 min) • TV Highway Corridor Study (Malu Wilkinson, Eryn Kehe and Michaela Skiles; 45 min) |



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| <p>August 6, 2021 virtual meeting</p> <ul style="list-style-type: none"> • CANCELLED | <p>August 18, 2021 – MTAC/TPAC Workshop Virtual Mtg.</p> <ul style="list-style-type: none"> • CANCELLED |
| <p>September 3, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-**** <i>Recommendation to JPACT</i> (Lobeck, 15 min) • 2024-27 ODOT Administered Funding-Program Allocations & Scoping updates (Chris Ford; 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 10 min) | <p>September TPAC workshops</p> <p>September 8, 2021: TPAC workshop, 10am – noon</p> <ul style="list-style-type: none"> • Regional Mobility Policy Update (Kim Ellis, Metro, Lidwien Rahman, ODOT, and Susie Wright, Kittelson; 90 min) • Status Report on Household Survey (Chris Johnson, 30 min) |
| <p>October 1, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-**** <i>Recommendation to JPACT</i> (Lobeck, 15 min) • <i>Regional Mobility Policy Update (Kim Ellis, Metro/ Lidwien Rahman, ODOT, 30 min)</i> • 2024-27 ODOT Administered Funding-Program Allocations & Scoping updates (Chris Ford; 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 10 min) | <p>October 20, 2021 – MTAC/TPAC Workshop Virtual Mtg.</p> <ul style="list-style-type: none"> • Scoping Kick-off for 2023 Regional Transportation Plan Update (Kim Ellis, Metro; 90 min) • <i>Emerging Growth Trends work program (Ted Reid, 20 min)</i> |



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| <p>November 5, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min) • Regional Mobility Policy Update <u>Recommendation to JPACT</u> (Kim Ellis, Metro/ Lidwien Rahman, ODOT, 30 min) • 2024-27 ODOT Administered Funding-Program Allocations & Scoping updates (Chris Ford; 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 10 min) | <p>November TPAC workshops</p> <p>November 10, 2021 TPAC Workshop, 10 am - noon</p> |
| <p>December 3, 2021 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Creating Safe Space at TPAC (Chair Kloster) • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 21-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min) • 2023 Regional Transportation Plan Update Scoping (Kim Ellis, 30-45 min.) • 2024-27 ODOT Administered Funding-Program Allocations & Scoping updates (Chris Ford; 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 10 min) | <p>December 15, 2021 - MTAC/TPAC Workshop</p> <ul style="list-style-type: none"> • <i>2020 Census Report Update (Chris Johnson, TBD)</i> |

Parking Lot: Future Topics/Periodic Updates

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| <ul style="list-style-type: none"> • Hwy 26/Westside Transportation Study (Bihn/ODOT) • I-5 Bridge Replacement Project Update, fall/winter • I-205 Project Update • Update on SW Corridor Transit • Rose Quarter update, fall/winter • Burnside Bridge Earthquake Ready Project Update (Megan Neill, Multnomah Co) • Columbia Connects Project | <ul style="list-style-type: none"> • 2020 Census • Ride Connection Program Report (Julie Wilcke) • Get There Oregon Program Update (Marne Duke) • Update on US Congress INVEST in America Act and HEROS Act (informational) • RTO Updates (Dan Kaempff) • 2021 PILOT Grants Update (Eliot Rose) • Telework affects post COVID on transportation (TriMet/Eliot Rose) • Best Practices and Data to Support Natural Resources Protection (Lake McTighe, 90 min) |
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Agenda and schedule information E-mail: marie.miller@oregonmetro.gov

To check on closure or cancellations during inclement weather please call 503-797-1700.

Memo

Date: May 27, 2021
To: Transportation Policy Advisory Committee (TPAC), Metro Technical Advisory Committee (MTAC) and interested parties
From: Lake McTighe, Regional Planner
Subject: Monthly fatal crash update for 2021

The purpose of this memo is to provide an update to TPAC, MTAC and other interested parties on the number of people killed in traffic crashes in Clackamas, Multnomah and Washington Counties over the previous month and the total for the year.

Fatal crash information is from the Preliminary Fatal Crash report from the Oregon Department of Transportation's (ODOT) Transportation Data Section/Crash Analysis and Reporting Unit. There are typically several contributing factors to serious crashes. Alcohol and drugs, speed, failure to yield the right-of-way, and aggressive driving are some of the most common causes. Road design and vehicle size can contribute to the severity of the crash.

- As of 5/26/21, there have been 8 traffic deaths in May and 53 in 2021.
- Thirty percent of the traffic deaths in 2021 have been people walking.
- There have been no deaths involving people riding bicycles in 2021.
- Thirty-eight percent of the traffic deaths have occurred on state highways.
- Eighty percent of the traffic deaths have occurred in Multnomah County.

Traffic crash victims in Clackamas, Multnomah and Washington Counties as of 5/26/21

| Name(s), age | Travel mode | Roadway | County | Notes | Date |
|-------------------------------|--------------------|----------------------------|---------------|----------------------------|-------------|
| Sergio Hunt, 17 | walking | NE Milton/NE 145th | Multnomah | homicide, hit and run | 23-May |
| Carl Vernon Holmes, 84 | driving | 489 NW Burnside | Multnomah | | 19-May |
| Unknown | driving | Burnside Road/ Eastman St. | Multnomah | | 19-May |
| Jose Luis Mendez, 51 | walking | Tualatin Valley Highway | Washington | | 12-May |
| Janell Rene Butler, 46 | driving | SW 1st and Washington | Washington | | 11-May |
| Martin Ixquiactap-Tambriz, 41 | walking | TV Highway | Washington | | 10-May |
| Megan McComb, 32 | scooter | NE Sandy/ NW 149th | Multnomah | | 8-May |
| David Dentler, 25 | driving | NE Sandy/NE Killingsworth | Multnomah | | 6-May |
| Errol Reese, 57 | walking | N Crawford/ N Philadelphia | Multnomah | hit and run, homicide | 19-Mar |
| Jamie Pallviny-Brown, 43 | driving | Cornfoot Rd. | Multnomah | speed; drove under trailer | 29-Apr |

TPAC-MTAC monthly fatal crash update

| Name(s), age | Travel mode | Roadway | County | Notes | Date |
|------------------------------------------------------|--------------|-------------------------------------|------------|--------------------------------------|--------|
| Anthony L. Tolliver, 30 | walking | 82nd Ave. | Multnomah | hit and run | 24-Apr |
| Stephanie Chambers, 52, Blaise McGuire, 21 | driving | Willamette Falls Drive/6th/Chestnut | Clackamas | two vehicles | 21-Apr |
| Joe Tavera, 23 | Driving | Tualatin Valley Hwy | Washington | t-bone | 20-Apr |
| Eddy M. Kolb, 23 | motorcycling | N Marine | Multnomah | speed | 19-Apr |
| Yotty, 57 and Thomas, 58 | driving | I-5 | Multnomah | driving wrong way, head on | 17-Apr |
| Josue Sanabria, 21 | Driving | SW River Road | Washington | tree | 17-Apr |
| Oliver Sevin Frazier-Savoy, 24 | Walking | SW Murray | Washington | | 15-Apr |
| Thomas Barron,33 | driving | I-84 | Multnomah | into barrier | 15-Apr |
| Faustino Jurado, 47 | walking | NE 122nd/NE Halsey | Multnomah | | 11-Apr |
| Stephen Kelsey Looser, 66 | walking | 82nd Ave. | Clackamas | | 10-Apr |
| Gabriel Cook, 46 | motorcycling | Amisigger Rd | Clackamas | ditch | 4-Apr |
| Richard LeRoy Russell, 84 | driving | OR211 | Clackamas | angle | 1-Apr |
| Kfir Hen, 47 | motorcycling | SE Barbara Welch Road | Multnomah | single vehicle crash, tree | 31-Mar |
| Inna Danilovna Bosovik, 36, Susan Kay Sturdavant, 65 | driving | I-84 | Multnomah | head on | 25-Mar |
| Galdino Salazar Jr.,36 | driving | S Cramer/S Barndards | Clackamas | rollover | 7-Mar |
| Morise Messiah Smith, 21, and Cecilia R. Hao, 70 | driving | I-205, Glenn Jackson Bridge | Multnomah | head on, traveling wrong direction | 8-Mar |
| Baylei Mead, 9 | walking | Eastman Parkway/ NW 3rd | Multnomah | walking to bus stop, car jumped curb | 6-Mar |
| Brian Joel Neeley, 61 | walking | SE Clover Lane | Clackamas | rolling truck (no driver) | 6-Feb |
| Jose Ignacio Contreras, 22 | driving | SW Barbur Blvd/ SW Hooker St | Multnomah | speed, over embankment | 28-Feb |
| Donald Ray Harvey, 86 | walking | SW Clark Hill Rd/SW Tile Flat Rd | Washington | hit and run | 20-Feb |
| Antonio Lopez-Amaro, 57 | driving | I-205, Glenn Jackson Bridge | | ice, weather, bridge into water | 14-Feb |
| Kenna Danielle Butchek, 35 | driving | N Columbia/Fiske | Multnomah | tree | 7-Feb |

TPAC-MTAC monthly fatal crash update

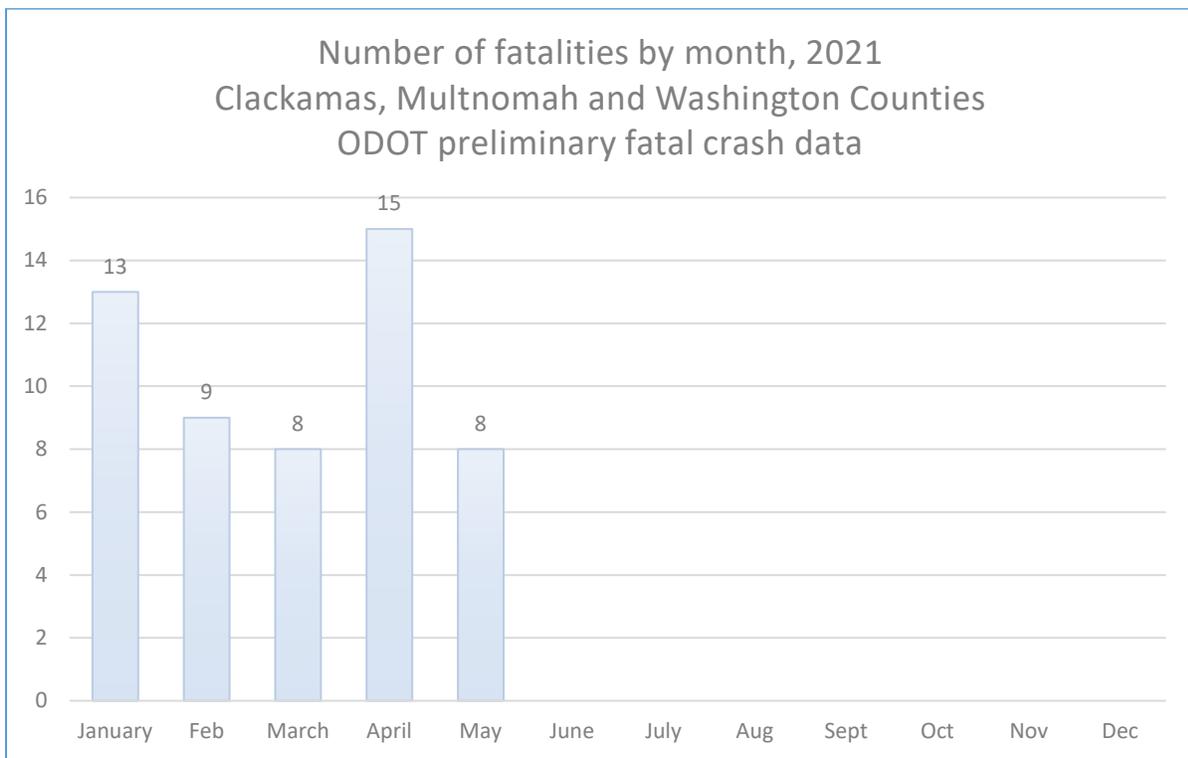
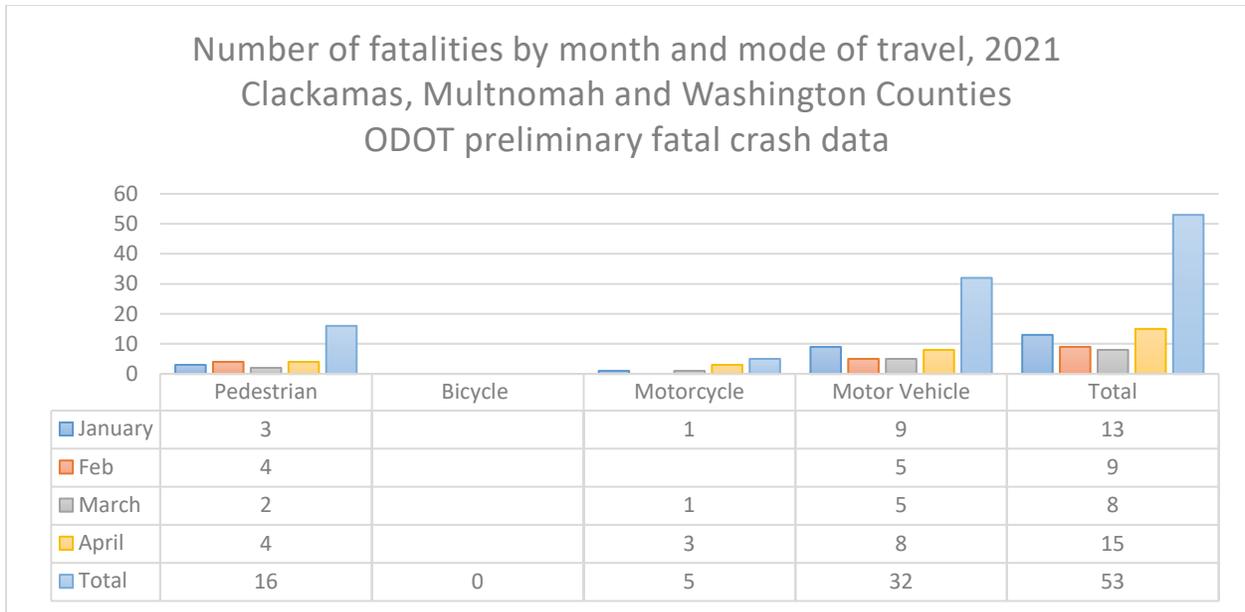
| Name(s), age | Travel mode | Roadway | County | Notes | Date |
|----------------------------|--------------|--------------------------------|------------|---------------------------------------|--------|
| Douglas Rosling II, 40 | driving | Yeon/ Nikolai | Multnomah | lost control, rollover, into building | 7-Feb |
| Joshua Stanley, 34 | walking | SE Mcloughlin/SE Franklin | Multnomah | no lighting, midblock | 6-Feb |
| Karen McClure, 60 | walking | SE Stark/SE 136th | Multnomah | hit and run | 6-Feb |
| Jerry Ray Jeffries, 73 | driving | Hwy 37 Wilson River | Washington | | 3-Feb |
| Grant Fisher, 23 | driving | Hwy 26/ Stone Road | Clackamas | DUII, speed, rear end | 29-Jan |
| Mark Lester Auclair, 64 | driving | NW Nicolai St near NW 26th Ave | Multnomah | into building | 28-Jan |
| Charles Patton, 43 | driving | N Columbia Blvd/N Vancouver | Multnomah | hit and run, head on | 28-Jan |
| Gabriel Castro, 29 | driving | Tualatin Valley Highway | Washington | two vehicles | 28-Jan |
| Veronica Lynn Zearing, 52 | driving | S Springwater Rd. | Clackamas | head on | 25-Jan |
| Jean Gerich, 77 | walking | SE Stark Street 33rd-13th | Multnomah | homicide, hit and run | 25-Jan |
| Eddie Larson, 48 | driving | N Marine Drive | Multnomah | rollover into river | 24-Jan |
| Joshua Brooks Frankel, 27 | motorcycling | S Sconce Rd & S Arrow Ct | Clackamas | head on | 14-Jan |
| Brenda Stader, 50 | walking | Hwy 26 near Sandy | Clackamas | safety work zone | 13-Jan |
| Elina Marie Inget, 66 | driving | OR 213, near Mulino | Clackamas | icy conditions, angle | 9-Jan |
| Andrew Nick Lucero, 50 | walking | N Denver Ave/N Columbia | Multnomah | hit and run | 9-Jan |
| Charisa Michelle White, 73 | driving | SE Powell/SE 24th | Multnomah | possible medical event | 8-Jan |
| Daniel Martinez, 19 | driving | SE Division/SE 112th Ave | Multnomah | speed | 1-Jan |

ODOT Preliminary fatal crash data; information is preliminary and subject to change

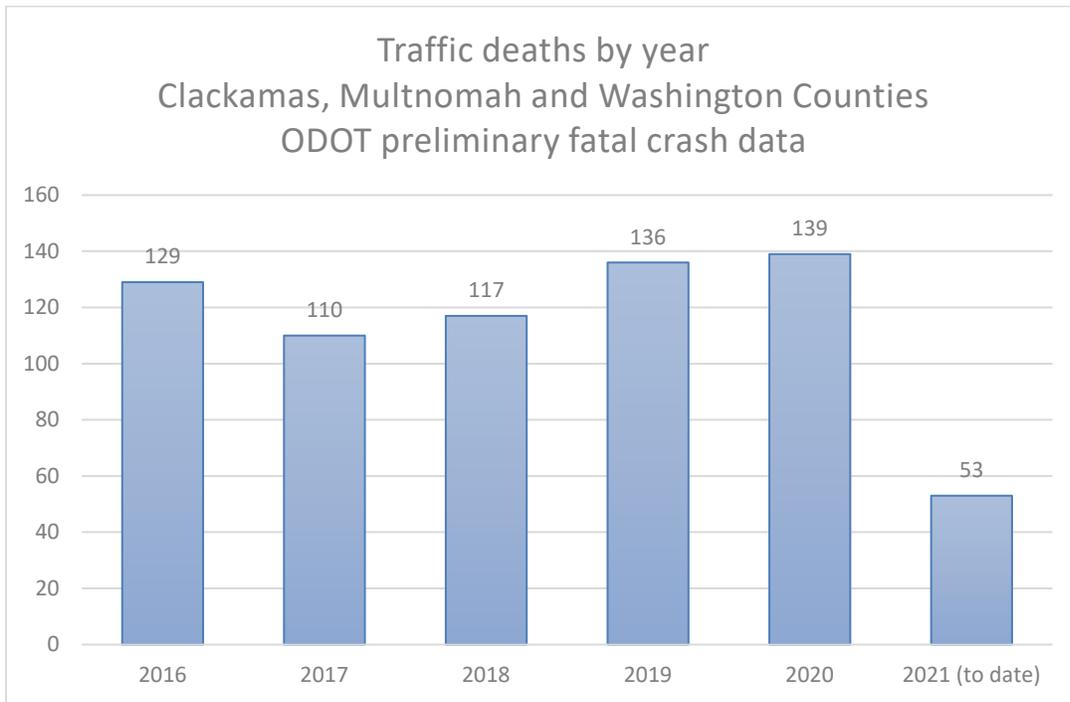
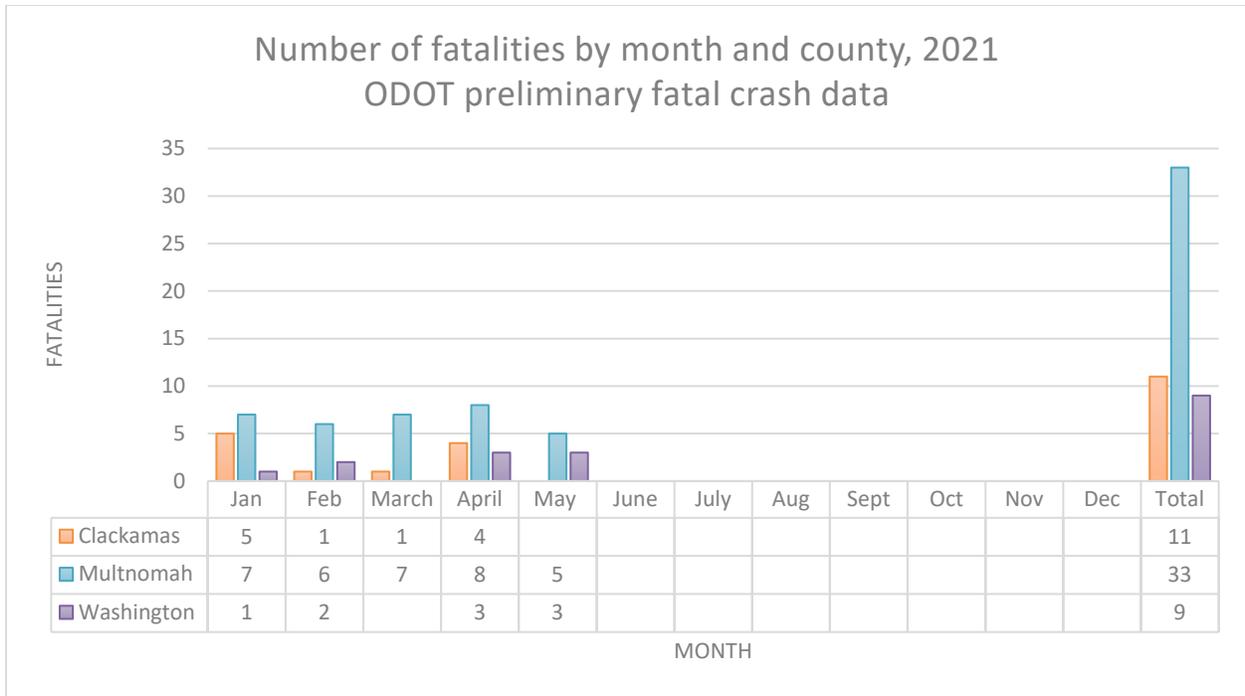
2021 preliminary fatalities

all data ODOT preliminary fatal crash data as of 5/26/21

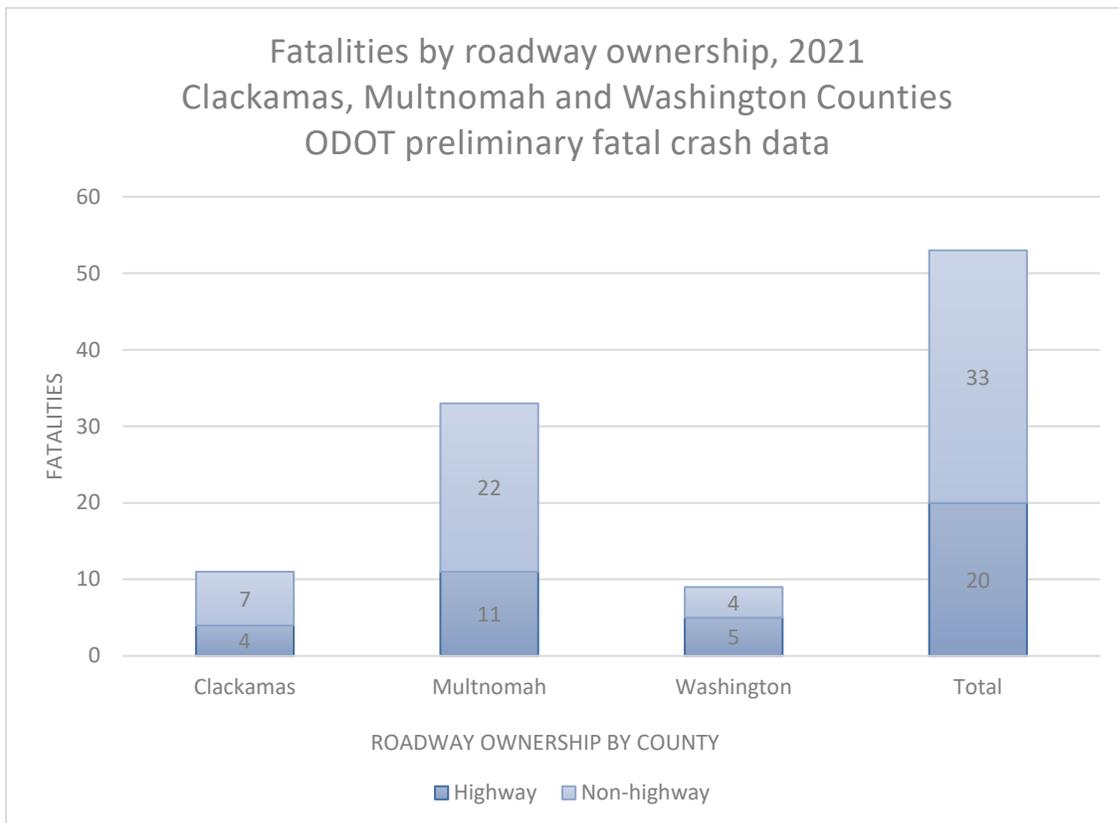
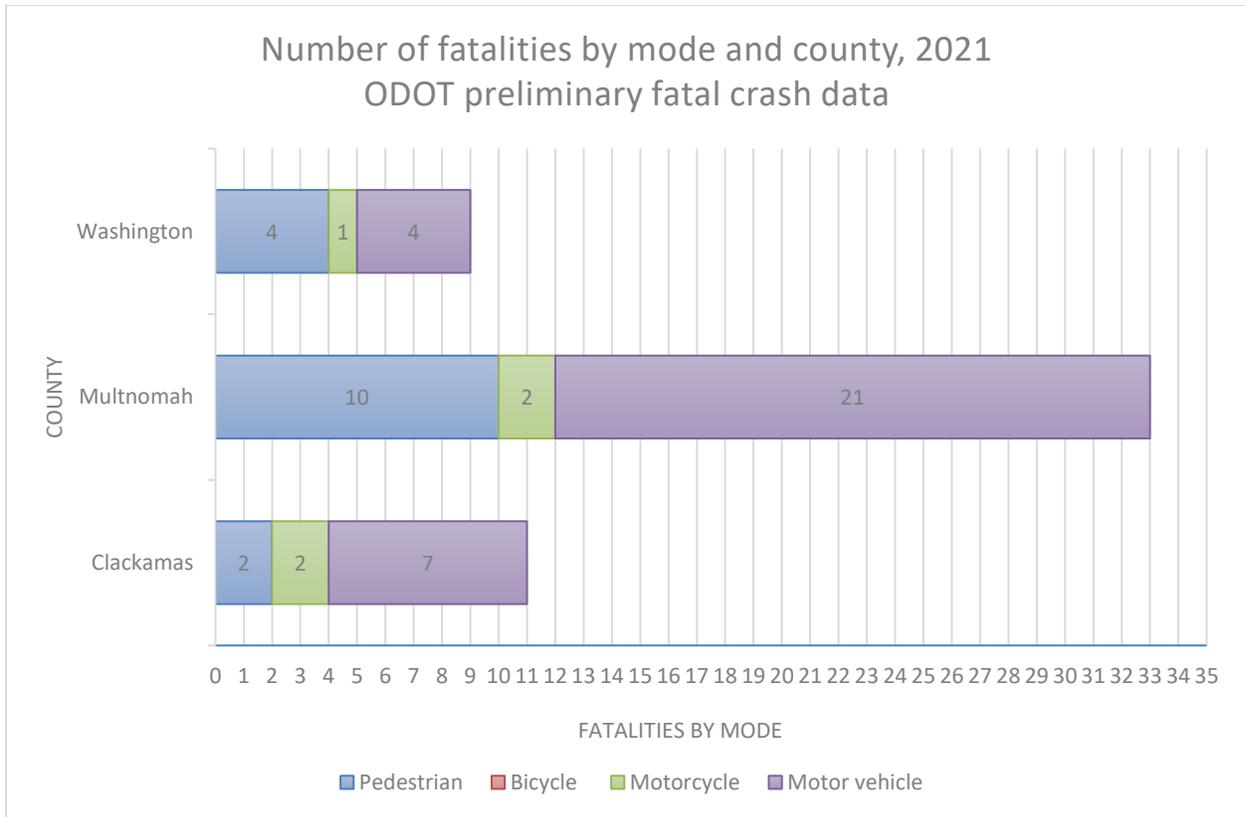
TPAC-MTAC monthly fatal crash update



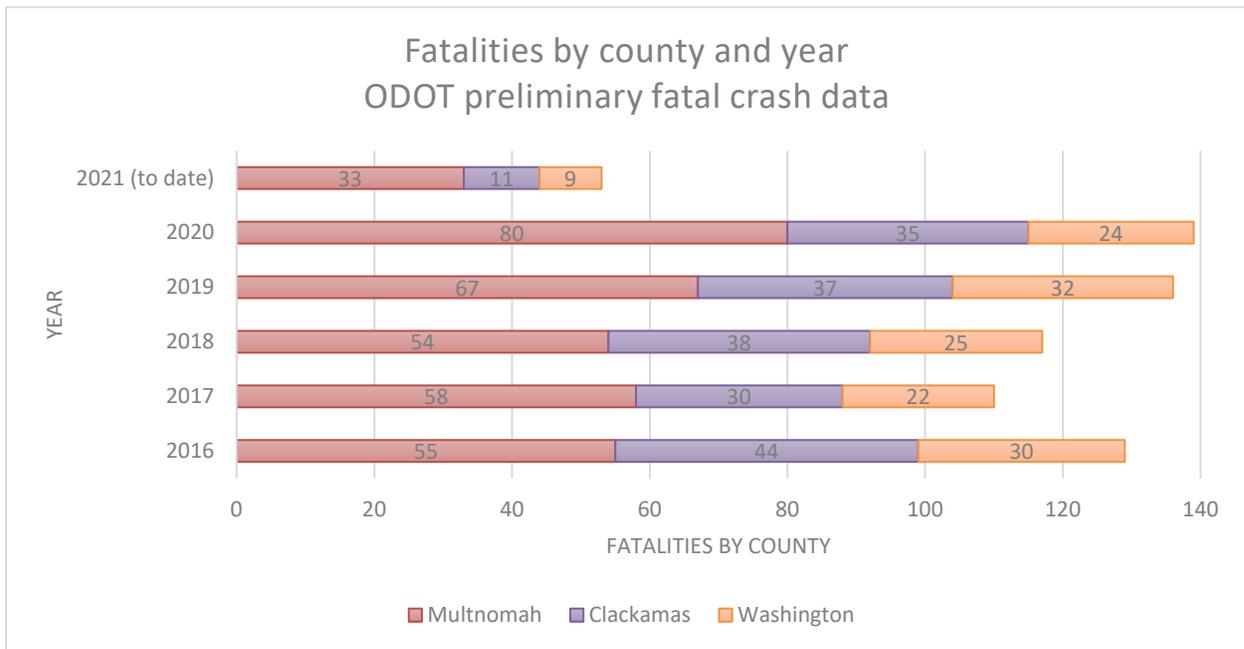
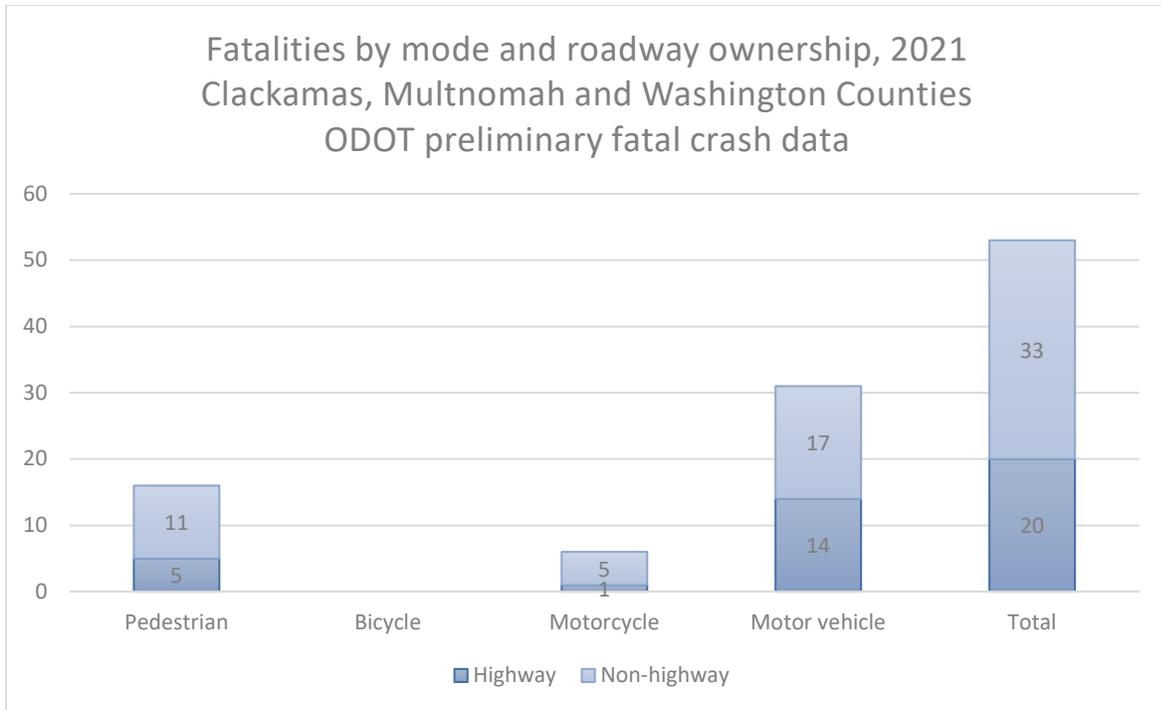
TPAC-MTAC monthly fatal crash update



TPAC-MTAC monthly fatal crash update



TPAC-MTAC monthly fatal crash update





Meeting minutes

Meeting: **Transportation Policy Alternatives Committee (TPAC)**

Date/time: Friday, May 7, 2021 | 9:30 a.m. to 12:00 noon

Place: Virtual online meeting via Web/Conference call (Zoom)

Members Attending

Ted Leybold, Vice Chair
Karen Buehrig
Allison Boyd
Chris Deffebach
Lynda David
Eric Hesse
Dayna Webb
Jay Higgins
Don Odermott
Jeff Owen
Chris Ford
Karen Williams
Lewis Lem
Yousif Ibrahim
Katherine Kelly

Affiliate

Metro
Clackamas County
Multnomah County
Washington County
SW Washington Regional Transportation Council
City of Portland
City of Oregon City and Cities of Clackamas County
City of Gresham and Cities of Multnomah County
City of Hillsboro and Cities of Washington County
TriMet
Oregon Department of Transportation
Oregon Department of Environmental Quality
Port of Portland
Community Representative
City of Vancouver, Washington

Alternates Attending

Jamie Stasny
Emily Miletich
Jaimie Huff
Julia Hajduk
Jon Makler
Glen Bolen
Gerik Kransky
Jason Gibbens

Affiliate

Clackamas County
Multnomah County
City of Happy Valley and Cities of Clackamas County
City of Sherwood and Cities of Washington County
Oregon Department of Transportation
Oregon Department of Transportation
Oregon Department of Environmental Quality
Washington State Department of Transportation

Members Excused

Laurie Lebowsky
Jessica Stetson
Donovan Smith
Gladys Alvarado
Idris Ibrahim
Wilson Munoz
Rachael Tupica
Rob Klug
Shawn M. Donaghy
Jeremy Borrego
Rich Doenges

Affiliate

Washington State Department of Transportation
Community Representative
Community Representative
Community Representative
Community Representative
Community Representative
Federal Highway Administration
Clark County
C-Tran System
Federal Transit Administration
Washington Department of Ecology

Guests Attending

Mike Foley
Jean Senechal Biggs
Kari Schlosshauer
Sarah Iannore
Brett Morgan
Judith Gray
Kara Hall
Kate Freitag
Laura Edmonds

Affiliate

City of Beaverton
Safe Routes to Schools
The Street Trust
1000 Friends of Oregon
Fehrs & Peers
Fehrs & Peers
Oregon Department of Transportation
North Clackamas Chamber of Commerce

Metro Staff Attending

| | |
|---------------------------------------------|----------------------------------------------------|
| Ken Lobeck, Funding Programs Lead | Dan Kaempff, Principal Transportation Planner |
| Lake McTighe, Senior Transportation Planner | Grace Cho, Senior Transportation Planner |
| Cindy Pederson, Research Center Manager | Kim Ellis, Principal Transportation Planner |
| Caleb Winter, Senior Transportation Planner | Eliot Rose, Senior Tech & Transportation Planner |
| Matthew Hampton, Sr. Transportation Planner | Patrick McLaughlin, TOD Development Planner |
| Robert Spurlock, Senior Regional Planner | Noel Mickelberry, Associate Transportation Planner |
| Tim Collins, Senior Transportation Planner | Marie Miller, TPAC Recorder |

1. Call to Order, Declaration of a Quorum and Introductions

Vice Chairman Leybold called the meeting to order at 9:30 a.m. Introductions were made. A quorum of members present was declared. Guests, public and staff were noted as attending. Reminders where Zoom features were found online was reviewed.

2. Comments From the Chair and Committee Members

- **Committee input form on creating a Safe Space at TPAC** (Vice Chairman Leybold) The link to adding comments and input for creating a safe space at TPAC was noted in the chat area of the meeting, which members are welcome to use at any time during the meeting. Comments will be collected and shared at the end of the meeting.
- **Updates from committee members and around the Region** (Vice Chairman Leybold and all) Updates to the TPAC member/alternate member roster were noted. Allison Boyd is now the member representative from Multnomah County; Jessica Berry and Emily Miletich are alternative members. Jay Higgins is now the member representative from City of Gresham and Cities of Multnomah County. Chris Strong is the alternative member. *Following this meeting TPAC was informed that Terra Wilcoxson is being added to alternative member for City of Gresham and Cities of Multnomah County.* These updates will be made in TPAC rosters and meeting/notices distribution.
- Jeff Owen noted TriMet's hiring process for a new General Manager is moving along well. New leadership identification in this role is expected soon.
- Eric Hesse noted that Metro Councilor Bob Stacey was recently honored for his long term service to the region with the renaming of the over cross in SE Portland.
- **Monthly Metropolitan Transportation Improvement Program (MTIP) Amendments Update** (Ken Lobeck) It was noted that in the meeting packet the monthly submitted MTIP formal

amendment and administrative modification project lists during April 2021 timeframe were reported. For any questions on the memo contact Mr. Lobeck.

- **Fatal crashes update** (Lake McTighe) Ms. McTighe provided an update on the number of people killed in traffic crashes in Clackamas, Multnomah and Washington Counties over the previous month and the total for the year. There have been a high number of pedestrians killed this year in addition to motorcycle crashes, many due to speed factors. Portland is on track to 85% higher crashes this year over last. A reminder was given on the upcoming Regional Transportation Safety Forum May 26, 9-12 noon. Vice Chair Leybold noted a recent article in the Atlantic Magazine on the serious impact to lives with fatal crashes. The article link: <https://www.theatlantic.com/ideas/archive/2021/05/car-accident/618766/>
- **Metropolitan Transportation Improvement Program (MTIP) proposed subcommittee/work group/pilot concept** (Vice Chairman Leybold) Vice Chair Leybold noted the cover memo and proposals for increased engagement on MTIP activities with options of either a subcommittee or work group. The two options were described in the memo. TPAC was asked to provide feedback in the next week directly to Vice Chair Leybold and answer the questions in the cover memo with any suggestions and input. The feedback provided will be brought forward next month. Metro staff is targeting July for an initial kickoff meeting for initiating this work.

3. Public Communications on Agenda Items (none)

4. Consideration of TPAC Minutes from April 2, 2021

MOTION: To approve minutes from April 2, 2021 as written.

Moved: Don Odermott

Seconded: Eric Hesse

ACTION: Motion passed unanimously.

5. Metropolitan Transportation Improvement Program (MTIP) Formal Amendment 21-5177

(Ken Lobeck) The MTIP Formal Amendment 21-5177 was presented. The May 2021 MTIP Formal Amendment bundle consists of required updates and changes to two groups of projects. The first group involves reprogramming several UPWP project grouping buckets out to FY 2025. The UPWP projects are being pushed-out to the MTIP non-constrained year in FY 2025 to avoid possible conflicts with the annual Obligation Targets. The key conflict involves how much Metro allocated Surface Transportation Block Grant (STBG) funds will be needed to support the annual UPWP.

Once the annual UPWP is developed with the approved list of project, the STBG funds will be advanced through a formal/full amendment to the required obligation year in the MTIP. This action will help avoid identifying UPWP projects prematurely for the annual Obligation Targets program that end not being part of the final UPWP or, due to a need to further scope the project, will not obligate in the current federal fiscal year.

The UPWP reprogramming action occurring through this formal/full MTIP will take two formal amendments to complete. Thirteen projects are identified as part of the May 2021 Formal MTIP. The remaining UPWP reprogramming actions will be completed through the June 2021 MTIP Formal Amendment. The second group of projects included in the May 21 Formal MTIP Amendment consist of the regular projects that require changes which are significant to trigger the formal amendment.

Following descriptions of the projects, Mr. Lobeck asked for questions on any of the materials before asking for a recommendation on the resolution.

Comments from the committee:

- Chris Deffebach asked why Metro funds are being bumped out to FY 23-25. Mr. Lobeck noted that the annual Obligation Targets program is designed on the capital project delivery process which includes multiple project phases, defined scopes, and defined approval steps. This allows the project managers, ODOT Local Agency Liaisons (LAL), and Metro oversight staff the ability to project phase obligation timing and delivery of scope activities six months or more with an 80% or higher confidence level. This is not the case for UPWP planning projects that utilize federal funds.

UPWP planning projects are less structured in scope and delivery requirements. They do not fit well into the capital project highway delivery process. Due to these differences, UPWP planning projects are more difficult to estimate their obligation month with 90% or higher certainty factor. As a result, estimating the correct obligation timing for UPWP planning projects is about 50%-50% guess. Unfortunately, with a minimum obligation target of 80%, there is an insufficient error margin for the Metro Annual Obligation Targets project list to absorb the failure of UPWP planning projects to obligate during their identified fiscal year and still meet the 80% minimum obligation requirement.

Vice Chair Leybold noted that Metro would refine this message for JPACT for clarity.

- Don Odermott asked if the removal of the Stark Street project and award to the Cornelius Pass Road project was a step 2 RFFA project. Vice Chair Leybold noted this was an ODOT allocation project of enhanced funds.
- Chris Ford added noted that in March the Oregon Transportation Commission (OTC) awarded \$60 million to the Office of Mobility for work on the tolling project. Significant interest on the project resulted in \$1 million of this funding to be used for early communication and public involvement. ODOT is working with Metro staff on clarification with project changes as needed.
- Karen Buehrig asked for more clarity on the process and selection by ODOT on the Cornelius Pass Road project when presenting this to JPACT. It should be noted this was not a RFFA decision but an OTC decision, and why this selection was made for the funds. It was noted that as scoping progressed with the Stark Street project, a significant increased project cost would impact the project if it moved forward. ODOT and Multnomah County agreed that the funds could be re-purposed and applied to a substitute project. It was agreed that more clarity be presented to JPACT on the source of the funds and why used for the Cornelius Pass Road project.

MOTION: TPAC recommends to JPACT an approval recommendation of Resolution 21-5177 consisting of thirteen projects which include required updates to the UPWP impacting Metro, and two additional projects impacting Multnomah County and ODOT.

Moved: Jon Makler

Seconded: Karen Buehrig

ACTION: Motion passed unanimously.

6. **2025-27 Regional Flexible Funds Allocation (RFFA) Strategic Direction preparation for recommendation in June meeting** (Dan Kaempff) Mr. Kaempff provided a review of input from three RFFA workshops and questions to discuss development of the 2025-2027 Program Direction. The RFFA Program Direction is a document with a statement of intent to target regional funds to achieve regional priorities, set objectives and outcomes for allocation process, and define funding categories (Steps 1 & 2).

A series of questions were proposed by Mr. Kaempff for TPAC discussion.

Q1: Step 2 categories & targets

Is TPAC supportive of eliminating the Step 2 categories & targets?

- Active Transportation/Complete Streets – 75%
- Freight Mobility – 25%

Input received throughout the workshop process indicated support to eliminate the Step 2 categories of Active Transportation/Complete Streets and Freight/Economic Development and their associated funding targets in favor of a process that allows projects to be proposed of any mix of mode and function improvements that best advance the Investment Priority categories. Metro staff intends to present a Program Direction recommendation to TPAC that is responsive to this input. This may require additional emphasis of evaluating projects or ensuring there is an adequate pool of projects that will be eligible to utilize the different sources of federal funding allocated to projects in the RFFA/MTIP process.

Q2: Should any priorities be weighted?

Comments made in the first two workshops indicated that some participants had an interest in emphasizing certain priorities. In response to that interest, the first question posed in the third workshop was to get a more definitive sense of people’s opinions on weighting of investment priority categories. Based on input from the workshop attendees, it does not appear that there is a strong interest to weight any of the four RTP priorities.

In response, staff is not recommending any weighting occur in the Step 2 project technical evaluation. The technical evaluation report will be structured in a manner that provides information to TPAC and JPACT that allows them to consider selecting a set of projects that focus on one or more of the RTP priorities, should they choose to do so.

Q3: Consider other evaluation areas?

- Should there be an additional priority area beyond the four RTP priorities?
 - If so, is one of two identified options preferred?
 - Include In The Four or Four Plus One?

Workshop participants indicated an interest in measuring the anticipated economic outcomes of proposed projects. There are two approaches that staff has identified that could be followed to evaluate projects in this manner.

1. **Include in The Four:** Include outcomes and measures within the four RTP priorities for recognizing how they are advancing economic outcomes, as defined by the RTP Goal 2, its related objectives, and the Investment Priorities defined in RTP Chapter 6. This approach recognizes the inclusion of economic considerations in the investment priorities used in developing the 2018 RTP project lists. Outcomes and measures would reflect the identified policy language related to attracting jobs and businesses, and saving time and money. A project’s technical evaluation would reflect that economic outcomes were

considered as part of the overall evaluation. Economic considerations would not receive a separate rating along with ratings in the four priority areas.

2. Four Plus One: Develop an additional category in addition to the four RTP priorities to enable measurement of how a project is advancing economic outcomes as identified in the 2018 RTP.⁵ In addition to the above economic aims, maintaining reasonably good transportation access is identified as being an important part of keeping and growing traded sector industries. Traded sector industries have been identified in the RTP as the primary enabler of economic growth in the region.

Q4: Input on Outcomes-based approach

Based on the input related to elimination of the existing Step 2 categories, for workshop 3, staff asked for input on a draft Step 2 single project category evaluation approach. This approach is aimed at identifying quantifiable project outcomes, tied to the four RTP priorities. This approach reflects participant and stakeholder feedback following the previous RFFA cycle indicating the need for a more clear connection between RTP priorities and the project evaluation methodology. The intent with this approach is to provide more clarity to how projects will be evaluated and assist local jurisdictions in advancing projects for consideration that most completely meet RTP investment priorities.

If this approach is used, further work would follow the adoption of the 2025-2027 RFFA Program Direction to identify specific measures for each outcome. The goal is to create a transparent project application and evaluation process that is clear to proposers and provides decision-makers with a thorough understanding of how proposed projects advance the RTP Investment Priorities.

During the summer of 2021, Metro will convene a project evaluation work group comprising a representative cross section of regional agency staff and community leaders. This work group will assist in the creation of these measures and evaluation tools and conduct the evaluation in spring 2022. Staff will present the evaluation methodology and framework to TPAC for their input prior to the opening of the project call in November 2021.

Q5: Enhanced Transit Corridors

Workshop participants were asked for their input on how the region should consider a request from TriMet for another round of regional funds to advance the Enhanced Transit Corridors concept. Staff has identified two possible approaches to the TriMet request.

1. Metro staff would work with TriMet to develop an application for a one-time, programmatic allocation of funds. The application would include information on specific locations identified for improvements, define how TriMet and local jurisdictions would coordinate on project delivery, etc.
2. TriMet would work with local jurisdictions on one or more Step 2 applications for specific projects.

Mr. Kaempff reminded TPAC of next steps in the process. Staff will present a draft 2025-2027 RFFA Program Direction to TPAC for their discussion and recommendation to JPACT at the June 4 TPAC meeting. JPACT will consider and take action on a TPAC recommendation at their July 15 meeting.

Comments from the committee:

- Eric Hesse asked about the weighing of priorities, measures and scoring with economic development. How is the relationship of categories vs outcomes tied together, or should these

be separate criteria for scoring projects? Mr. Kaempff noted the intent to have decision makers see how economic development can be shown in criteria with outcomes in projects. Questions in the applications will address considerations with economic development.

A question was asked on the engagement process with the working group in developing the RFFA work program. Mr. Kaempff noted that once the program direction is established staff will work on the methodology which will be brought to TPAC. It was noted that the Enhanced Transit Corridors concept was not a Step 1 investment, but a one-time program request.

- Karen Williams noted initial discomfort with eliminating Step 2 category targets. Where would incentives to more active transportation projects move to? What are some options for retaining other transportation incentives besides vehicles? Mr. Kaempff noted that in contrast to the last RFFA cycle, this cycle looks to provide opportunities in projects with more creative, broader funding categories that still reflect RTP priorities, but do not reduce active transportation while achieving more multiple outcomes.
- Chris Deffebach asked for clarification on the process with TPAC's recommendation to JPACT on this program direction. Mr. Kaempff noted that staff is sharing input from TPAC to JPACT from today's meeting. TPAC will make final recommendation to JPACT in June, which JPACT will take action on in July.
- After reading Question one, it was noted the challenge of deciding to eliminate the funding split that may affect future decisions in the criteria and outcomes discussion.
- Jeff Owen noted that by removing the split, active transportation may benefit by being blended with other categories.
- Don Odermott noted there was support to remove the silo (split funding) as it made the peanut butter spread too thin for investment purposes, but to also establish an improved scoring structure on projects. There should be an awareness of how we design scores for evaluation, perhaps test projects through this scoring process.
- Chris Deffebach noted the 75%/25% split model is outdated.
- Karen Williams noted when the final recommendation is brought to TPAC it would be good to have the explanation of why the split was outdated and not achieving goals, and new methods recommended without the split with examples of how goals might be achieved.
- Karen Buehrig noted she was supportive of considering economic development in evaluation of projects. However, it was challenging on how and where these evaluation were being reviewed. It was suggested that establishing the economic development impact be assessed in a consistent manner. It was noted the 4 + 1 approach be understood that allowed for not overweighing scores for importance between RTP priorities.
- Eric Hesse noted that with economic development a key issue on direction it was important to get guidance on scoring this factor. Currently, he was disinclined to see the funds in separate categories, partly with multiple advancements of projects as the goal in outcome based, but if moving away from the split and back to scoring criteria that would achieve multiple outcomes. It was noted that if adding another category (economic development) in scoring projects, how this could be achieved mixed with other integrated project uses and outcomes.
- Jon Makler agreed with Mr. Hesse and Mr. Odermott's comments. It was noted he was in the thick chunky peanut butter camp on the danger of spreading the funds too thin. Safety is important but should not outweigh other categories with the scoring factors.
- Lewis Lem agreed with Mr. Makler and Mr. Hesse. It was noted that economics cut across costs and benefits in projects along with equity; all should be under consideration.

- Chris Deffebach was in favor of including economic development in the outcomes with more discussion and development on how this would fit in with criteria.
- Don Odermott was in favor of the 4 + 1 option that would add economic development as a category, which could open access to industrial significant areas that currently have no roads and hard to score projects.
- Jay Higgins recommended that jurisdictions bring forward ETC projects to Step 2.
- Karen Buehrig supports the ETC in Step 2. Metro already has ETC projects in the investment areas program so this would seem to fit with Step 2. Regarding the committee brought together for evaluation and developing criteria, there should be separation between creating measures and selecting/evaluating the projects.
- Eric Hesse noted that with ETC projects it was suggested to explore models with these projects.
- Don Odermott noted that in the County Coordinating Committee they were leaning toward ETC in Step 2.

7. 2021 Transportation System Management and Operations (TSMO) Strategy Update (Caleb Winter, Metro/Kara Hall, Fehr & Peers) Mr. Winter and Ms. Hall provided an update at the mid-point of the 2021 TSMO Strategy Update. Metro, Oregon Department of Transportation (ODOT), and their partner agencies are collaborating to develop the 2021 TSMO Strategy. The 2021 TSMO Strategy will position the region to collaboratively manage the transportation system in a rapidly changing environment while achieving regional goals such as safety, equity, vibrant communities, shared prosperity, and a healthy environment.

The first task of the TSMO Strategy was to bring an equity focus to the update. Metro DEI staff, Fehr & Peers consultants and leaders of Community Based Organizations helped develop a racial equity assessment tool for TSMO called the Equity Decision Tree. Starting at the roots, the assessment begins with seeking an understanding of the context, choices and voices that define a problem experienced on the transportation system. A series of connecting branches asks specific questions to arrive at an equity-focused solution, and then evaluate and be accountable to the result. The equity focus informed the region's TSMO vision and goals. The vision is an aspirational statement of what is achievable, and six goals provide strategic direction.

TSMO's vision statement: Collaborate to provide reliable, agile, and connected travel choices so that all users are free from harm, and to eliminate the disparities experienced by people of color and historically marginalized communities.

Goals:

Free From Harm

Create a transportation system where all users are free from harm.

Regional Partnerships/Collaboration

Collaborate as effective stewards of the transportation system.

Eliminate Disparities

Eliminate the disparities in the transportation system experienced by people of color and historically marginalized communities.

Connected Travel Choices

Connect all people to the goods, services, and destinations they need through a variety of travel choices.

Reliable Travel Choices

Provide a transportation system that is reliable for all users.

Prepare for Change

Manage the system to be agile in the face of growth, disruptions, and changing technology.

Next steps in the process is developing the objectives, targets and performance measures for each goal. Second half of the Strategy Update will focus on defining how far we can go in 10 years. Upcoming presentations and opportunities for adding input on the goal development toward strategy and action was described. TPAC will be reviewing this for adoption in late summer or early fall. The committee is encouraged to contact Mr. Winter with input.

Comments from the committee:

- Eric Hesse noted the work on the development with the goals and strategies and how technology outcomes can help with our projects. It was noted this could advance our work on the Mobility Policy Update as one example. Caution was given with the dozens of performance measures voiced, since more data can be less information.
- Jeff Owen appreciated the work on this. More time will be spent looking at the documents.
- Karen Buehrig asked what was meant my Regional Leadership Forum. This was clarified as the Community Leaders Forum on May 14 that plans to discuss various transportation projects.
- Sarah Iannarone noted that meaningful community engagement - especially among trauma impacted and communities of color - around setting targets and measures across the objectives (not just equity objectives) feels important in this moment of reckoning around racial justice and also to build important future relationships with communities who need these investments most.

- 8. Metro Emerging Trends Study (Eliot Rose)** Mr. Rose presented information on the Metro Emerging Trends study that will outline how Metro and our partners should respond to the major transportation trends that we expect to face in the Portland region during the coming decade following the COVID-19 pandemic and other recent disruptions. Metro is carrying out the study over the next year so that it can inform the 2023 RTP update.

Several data charts were shown to show trends collected so far. Asked if health concerns would change drive modes, active transportation and driving appear likely to be popular post-pandemic – other modes (carpool, ride share and public transit), not so much. The chart showing trip volumes and how we might close the transit gap showed that compared to vehicle trips, transit ridership declined more sharply and recovered more slowly during the pandemic. Climate events are also impacting how people travel.

When surveyed how concerns about racism and personal safety affect travel, walking while black vs city wide showed increased percentages walking while black. Increased concerns about racism and personal safety, as well as fear of exposure to COVID and other diseases, could have a long-term impact on people's choices.

Is this the teleworking revolution? Teleworking appears to be here to stay, but we don't know to what extent. Higher-income workers are much more likely to be able to work from home. Peak travel times may have changed. It was noted that early data suggest that teleworkers replace peak commutes with non-work trips during the day.

The freight study will add input to e-commerce trends as well. E-commerce appears to be here to stay. Question to be answered are how much did the pandemic accelerate its growth? How will that growth impact our streets and our communities? It was noted that trips to the places that anchor regional centers – stores, offices, and transit stations – fell sharply during the pandemic.

The project timeline was shared. May – June 2021 a consultant will be selected. The study is expected to take one year. From July – December 2022 study findings will inform RTP policy development and investment strategy. TPAC is encouraged to contact Mr. Rose on the scope of project and project relevant they are working on as well. TPAC will have updates on the study further in the year.

9. Regional Freight Study Updates (Tim Collins) This agenda item will be presented at a later date.

10. 2024-27 ODOT Administered Funding – Program Allocations and Scoping Updates (Chris Ford/Jon Makler, ODOT) Jon Makler presented an overview of statewide funding programs and an update on scoping of projects in Region 1. The Oregon Transportation Commission (OTC) adopted “programmatic allocations” for the 2024-27 Statewide Transportation Improvement Program (STIP) in January 2021. These funds are for Federal Fiscal Years ‘25, ‘26 and ‘27 which begin October 1 the year before.

Various pie charts were shown. The 24-27 STIP: “Other” Programs include State and Planning Research, and Indirect Cost Allocation Plan Highway Planning, \$161 billion over 3 years. Local programs, \$405 billion over 3 years includes Surface Transportation Programs to large MPOs, CMPQ, and Cities/Counties STIP funding. Public & Active Transportation allocates \$225 billion over 3 years, the Safety program \$147 billion, ADA & Enhance program, \$175 billion; \$263 billion, respectively. Fix-it program, which includes HB17 funds, allocates \$827 billion over 3 years.

Mr. Makler noted future TPAC presentations will dig into the individual programs and that ODOT is planning a workshop for the Region 1 Area Commission on Transportation this summer. TPAC will be notified when scheduled.

Regarding status of Region 1 scoping:

- Managers of programs (“Bridge”) produce lists for scoping.
- Technical teams investigate (“scope”) batches of projects on a rolling basis.
- In Region 1, the first batch kicked off this week.
- The process will stretch through the remainder of 2021.
- ODOT will share scoping lists once program managers approve their release.

Comments from the committee:

- Karen Buehrig asked if the scoping projects were mostly for the Fix-It program or more broad programs being submitted. Mr. Makler noted that from the list he has seen so far these are the Fix-It projects. The State ARTS projects ODOT knew early and ODOT would be scoping. Local ARTS projects are still being developed as more becomes known with cost effectiveness evaluation. The bike/ped strategy program will also take time to learn more before scoping can be developed.
- Chris Deffebach who was developing the guidelines for program evaluations? Mr. Makler noted the Active Transportation program came under the direction of Karyn Criswell. It was not known if their advisory committee and/or staff would be working on the guidelines.

11. Committee comments on creating a safe space at TPAC (Vice Chairman Leybold) Vice Chair Leybold noted the comments in shared anonymously for making TPAC a more safe space. For ways to elevate our community member connections in the meeting, it was suggested showing only TPAC members as panelists and showing guests and staff as attendees. It was asked if appropriate to reach out to members for specific RFFA feedback on program proposals before the next meeting. These ideas and input from TPAC will be reviewed and forwarded to staff.

12. Adjournment

There being no further business, meeting was adjourned by Vice Chairman Leybold at 12:04 pm.

Respectfully submitted,

Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC meeting, May 7, 2021

| Item | DOCUMENT TYPE | DOCUMENT DATE | DOCUMENT DESCRIPTION | DOCUMENT No. |
|------|---------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 1 | Agenda | 5/7/2021 | 5/7/2021 TPAC Agenda | 050721T-01 |
| 2 | TPAC Work Program | 4/29/2021 | TPAC Work Program as of 4/29/2021 | 050721T-02 |
| 3 | Memo | 4/28/2021 | TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments | 050721T-03 |
| 4 | Memo | 4/29/2021 | TO: TPAC and interested parties From: Lake McTighe, Regional Planner RE: Monthly fatal crash update | 050721T-04 |
| 5 | Memo | 04/30/2021 | TO: TPAC and interested parties From: Ted Leybold, Metro RE: MTIP topics at TPAC | 050721T-05 |
| 6 | Draft Minutes | 04/02/2021 | Draft TPAC minutes from April 2, 2021 | 050721T-06 |
| 7 | Resolution 21-5177 | 05/07/2021 | Resolution 21-5177 FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO REPROGRAM UNIFIED PLANNING WORK PROGRAM (UPWP) ANNUAL PROGRAM ESTIMATES OUTSIDE THE CONSTRAINED MTIP TO AVOID OBLIGATION TARGET CONFLICTS IMPACTING METRO, PLUS ADD ONE AND CANCEL ONE PROJECT IMPACTING MULTNOMAH COUNTY AND ODOT (MA21-10-MAY) | 050721T-07 |
| 8 | Exhibit A to Resolution 21-5177 | 05/07/2021 | Exhibit A to Resolution 21-5177 2021-2024 Metropolitan Transportation Improvement Program | 050721T-08 |
| 9 | Staff Report | 04/27/2021 | Staff Report to Resolution 21-5177 | 050721T-09 |
| 10 | Memo | 04/30/2021 | TO: TPAC and interested parties From: Dan Kaempff, Principal Transportation Planner RE: Input on DRAFT 2025-2027 Regional Flexible Funds Allocation Program Direction | 050721T-10 |
| 11 | Report | April 2021 | 2025-2027 Regional Flexible Funds Allocation Step 1 Investments Report | 050721T-011 |
| 12 | Memo | 04/29/2021 | TO: TPAC and interested parties From: Caleb Winter, Metro and Scott Turnoy, ODOT RE: Vision and Goals for the 2021 Transportation System Management & Operations Strategy Update | 050721T-12 |

| Item | DOCUMENT TYPE | DOCUMENT DATE | DOCUMENT DESCRIPTION | DOCUMENT No. |
|-------------|----------------------|----------------------|----------------------------------------------------------------------------|---------------------|
| 13 | Handout | N/A | Equity Decision Tree | 050721T-13 |
| 14 | Slide | 05/07/2021 | March 2021 traffic deaths in Clackamas, Multnomah and Washington Counties* | 050721T-14 |
| 15 | Presentation | 05/07/2021 | 2021-24 MTIP May 2021 Formal Amendment Summary Resolution 21-5177 | 050721T-15 |
| 16 | Presentation | 05/07/2021 | 2025-2027 Regional Flexible Funds Allocation Program Direction | 050721T-16 |
| 17 | Presentation | 05/07/2021 | 2021 Transportation System Management and Operations Strategy Update | 050721T-17 |
| 18 | Presentation | 05/07/2021 | Emerging trends study | 050721T-18 |
| 19 | Presentation | 05/07/2021 | Statewide Transportation Improvement Program | 050721T-19 |

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-24) RESOLUTION NO. 21-5182
METROPOLITAN TRANSPORTATION)
IMPROVEMENT PROGRAM (MTIP) TO COMPLETE) Introduced by: Chief Operating Officer
THE REPROGRAMMING OF UNIFIED PLANNING) Andrew Scott in concurrence with
WORK PROGRAM (UPWP) ANNUAL PROGRAM) Council President Lynn Peterson
ESTIMATES IMPACTING METRO, PLUS AMEND,)
ADD, OR CANCEL SEVERAL PROJECTS)
IMPACTING ODOT AND TRIMET TO ADDRESS)
THEIR NEXT FEDERAL APPROVAL STEP (JN21-)
11-JUN))

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

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved the 2021-24 MTIP via Resolution 20-5110 on July 23, 2020; and

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

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

WHEREAS, MTIP amendments now must also include assessments for required performance measure compliance, expanded RTP consistency, and strive to meet annual Metro and statewide obligation targets resulting in additional MTIP amendment processing practices and procedures; and

WHEREAS, Metro is now under formal annual obligation targets resulting in additional accountability for Metro to commit, program, obligate, and expend allocated federal formula funds; and

WHEREAS, Metro is continuing reprogramming out to Federal Fiscal Year (FFY) 2025 Unified Planning Work Programming (UPWP) repositioned project grouping buckets as part of the June 201 Formal MTIP Amendment Bundle to ensure the funds do not create conflicts with the annual Obligation Targets program; and

WHEREAS, the UPWP PGBs being reprogrammed consist of Safe Routes to Schools (SRTS) projects, Statewide Travel Survey, Transit Oriented Development (TOD), Transportation Systems Management and Operations (TSMO) administration and sub-allocations to awarded projects, and

WHEREAS, the Oregon Transportation Commission's approval of \$327 million for required American Disabilities Act (ADA) curb and ramp improvements enables two ODOT projects located on OR141 and US30 to now progress forward; and

WHEREAS, ODOT's OR99W and US30 Bypass signal and safety improvement project requires a significant project limits adjustment in order to complete final design and engineering activities; and

WHEREAS, ODOT's new Metro Transportation Systems Management and Operations (TSMO) Advance Traffic Controller Upgrade and Deployment project will provide improved traveler safety, plus system operation efficiencies, and will receive the awarded funding from two MTIP pre-positioned project grouping buckets as part of the amendment ; and

WHEREAS, ODOT's I-84 resurfacing project is being canceled from the MTIP as the surface conditions are in better shape than anticipated allowing the project to be delayed until the next STIP cycle; and

WHEREAS, procurement timing difficulties prevents TriMet from moving forward with their CMAQ funded Electric Bus Purchase requiring Metro and TriMet to identify an eligible suitable substitute to apply the CMAQ funds which now will be TriMet's MAX Red Line Extension project; and

WHEREAS, the a review of the proposed project changes has been completed against the current approved Regional Transportation Plan (RTP) to ensure the projects remain consistent with the goals and strategies identified in the RTP with the results confirming that no RTP inconsistencies exist as a result of the project changes from the June 2021 MTIP Formal Amendment; and

WHEREAS, RTP consistency check areas included financial/fiscal constraint verification, eligibility and proper use of committed funds, an assessment of possible air quality impacts, a deviation assessment from approved regional RTP goals and strategies, a validation that the required changes have little or no impact upon regionally significant projects, and a reconfirmation that the MTIP's financial constraint finding is maintained a result of the June 2021 Formal Amendment; and

WHEREAS, Metro's Transportation Policy and Alternatives Committee (TPAC) received their notification plus amendment summary overview, and recommended approval to Metro's Joint Policy Advisory Committee on Transportation (JPACT) on June 4, 2021; and

WHEREAS, JPACT approved Resolution 21-5182 consisting of the June 2021 Formal MTIP Amendment bundle on June 17, 2021 and provided their approval recommendation to Metro Council; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on July 8, 2021 to formally amend the 2021-24 MTIP to include the required changes identified in the June 2021 Formal MTIP Amendment Bundle and Resolution 21-5182.

ADOPTED by the Metro Council this ____ day of _____ 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



Proposed June 2021 Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **JN21-11-JUN**
 Total Number of Projects: 23

| Key Number & MTIP ID | Lead Agency | Project Name | Amendment Action | Added Remarks |
|-------------------------------------------------------|-------------|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| UPWP Project Reprogramming Actions | | | | |
| Project #1 Key 22160 MTIP ID 71109 | Metro | Safe Routes to Schools Program (FFY 2022) | | |
| Project #2 Key 22161 MTIP ID 71114 | | Safe Routes to Schools Program (FFY 2023) | | |
| Project #3 Key 22162 MTIP ID 71110 | | Safe Routes to Schools Program (FFY 2024) | | |
| Project #4 Key 22172 MTIP ID 71105 | Metro | Statewide Travel Survey | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program | The Statewide Travel Survey UPWP project will provide a contribution to statewide travel survey to inform travel forecasting models |

| | | | | |
|--------------------------------------------------------|-------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #5 Key 22163 MTIP ID 71102 | Metro | Transit Oriented Development (TOD) program (FFY 2022) | REPROGRAM PROJECTS: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program | The focus of TOD is to partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. |
| Project #6 Key 22164 MTIP ID 71103 | | Transit Oriented Development (TOD) program (FFY 2023) | | |
| Project #7 Key 22165 MTIP ID 71104 | | Transit Oriented Development (TOD) program (FFY 2024) | | |
| Project #8 Key 22169 MTIP ID 71124 | Metro | TSMO Administration (FFY 2022) | REPROGRAM PROJECTS: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program | The Transportation Systems Management and Operations (TSMO) administration revenues support various personnel costs to manage and administer the program |
| Project #9 Key 22170 MTIP ID 71125 | | TSMO Administration (FFY 2023) | | |
| Project #10 Key 22171 MTIP ID 71126 | | TSMO Administration (FFY 2024) | | |

| | | | | |
|----------------------------------------------------------------------------|-------|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #11 Key 22166 MTIP ID 71115 | Metro | TSMO Program Sub-allocation Funds (FFY 2022) | REPROGRAM PROJECTS: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program | The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effective. |
| Project #12 Key 22167 MTIP ID 71116 | | TSMO Program Sub-allocation Funds (FFY 2023) | | |
| Project #13 Key 22168 MTIP ID 71117 | | TSMO Program Sub-allocation Funds (FFY 2024) | | |
| Project #14 Key 20886 MTIP ID 70875 | Metro | Transportation System Mgmt Operations/ITS (2021) | REPROGRAM FUNDS: Reprogram to the unconstrained FY 2025 to avoid possible conflicts with the development and execution of annual obligation targets | This TSMO PGB provides strategic and collaborative program management including coordination of activities for TransPort TSMO |
| End of UPWP Related Project Changes | | | | |
| Project #15 Key 22431 New Project MTIP ID TBD | ODOT | OR141/OR217 Curb Ramps | ADD NEW PROJECT: The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements. | At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps. |
| Project #16 Key 22432 New Project MTIP ID TBD | ODOT | US30BY Curb Ramps | ADD NEW PROJECT: The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements. | At various location on US30 Bypass in the NE Portland area, construct ADA compliant curbs and ramps. |

| | | | | |
|------------------------------------------------------------------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #17 Key 21616 MTIP ID 71170 | ODOT | OR99W: OR217 - SW Sunset Blvd & US30B: Kerby - 162nd Ave OR99W: N Schmeer Rd - SW Meinecke Pkwy & US30B: Kerby - 165th Ave | <u>LIMITS CORRECTION:</u> The formal amendment updates the project name based on revised project limits MPs to match the approved charter when CMR-00 was processed. The limits are adjusted significantly, but the scope remains unchanged. | The project will upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. |
| Project #18 Key 20884 MTIP ID 70875 | Metro | Transportation System Mgmt Operations/ITS (2019) | <u>SPLIT/COMBINE PROJECT:</u> The formal amendment commits the remaining funds in this TSMO PGB to ODOT's new ATC project (included in this amendment bundle). As a result, Key 20884 is now zero programmed | Key 20884 is a TSMO project grouping bucket maintaining funds for awarded TSMO projects until they are ready to be programmed as stand-alone projects. |
| Project #19 Key 20885 MTIP ID 70875 | Metro | Transportation System Mgmt Operations/ITS (2020) | <u>SPLIT/COMBINE PROJECT:</u> The formal amendment splits \$233,747 of STBG and required match to ODOT's new ATC project (included in this amendment bundle). The programming years are being pushed-out to FY 2025 as well to avoid conflicts with the Obligation Targets program. | Key 20885 is a TSMO project grouping bucket maintaining funds for awarded TSMO projects until they are ready to be programmed as stand-alone projects. |
| Project #20 Key NEW PROJECT MTIP ID NEW - TBD | ODOT | Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy | <u>ADD NEW PROJECT:</u> The formal amendment adds the new Metro TSMO awarded project to the 2021-24 MTIP. The funding award originates from the Metro 2019-21 TSMO funding call. | Keys 20884 and 20885 are providing the awarded STBG funds for the project |
| Project #21 Key 21800 MTIP ID 71200 | ODOT | I-84: NE Martin Luther King Jr Blvd - I-205 | <u>CANCEL PROJECT:</u> The formal amendment cancels Key 21800, ODOT's I-84: NE Martin Luther King Jr Blvd - I-205 rehab project. | The reason for cancellation is due to the fact that the pavement along this segment of Interstate-84 is in better condition than expected. ODOT determined that the resurfacing can wait until the next STIP cycle. |

| | | | | |
|-------------------------------------------------------------------|---------------|------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Project #22 Key 22188 MTIP ID 71112</p> | <p>TriMet</p> | <p>Electric Bus Purchase (Metro Fund Exchange)</p> | <p><u>CANCEL PROJECT:</u> The formal amendment cancels the project from the MTIP and shifts the funds over to the TriMet MAX Red Line Extension project in Key 20849</p> | <p>The reason for the cancelation is due to a procurement and delivery delay that will prevent the bus purchase in FY 2023. The CMAQ funds have an obligation shelf-life expiration date of the end of FFY 2023. Due to this, Metro and TriMet worked together to reprogram the funds to TriMet's MAX Red Line Extension Project</p> |
| <p>Project #23 Key 20849 MTIP ID 71230</p> | <p>TriMet</p> | <p>MAX Red Line Extension & Reliability Improvements</p> | <p><u>COST INCREASE:</u> The formal amendment adds the new CMAQ funds (and match) from Key 22188. The Max Red Line Extension project has been evaluated as a suitable substitute for the original Electric Bus purchase project in Key 22188. The project phase costs have been updated per TriMet's guidance as well.</p> | <p>Extend MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport, double track single track sections near Gateway/NE 99th Ave and at PDX Airport with reconfigured station, plus construct new light rail bridge and Red Line station at Gateway.</p> |



Metro
2021-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push out the project to FY 2025

| | | | |
|-------------------------------------------------------------------|---|---------------------------|-----------------------------|
| Lead Agency: Metro | | Project Type: Planning | ODOT Key: 22160 |
| Project Name: Safe Routes to Schools Program (FFY 2022) | 1 | ODOT Type: Planning | MTIP ID: 71109 |
| | | Performance Meas: No | Status: 0 |
| | | Capacity Enhancing: No | Comp Date: 9/30/2025 |
| | | Conformity Exempt: Yes | RTP ID: 12021 |
| | | On State Hwy Sys: No | RFFA ID: 50399 |
| | | Mile Post Begin: N/A | RFFA Cycle: 2022-24 |
| | | Mile Post End: N/A | UPWP: Yes |
| | | Length: N/A | UPWP Cycle: SFY 22-23 |
| | | Flex Transfer to FTA: Yes | Transfer Code: 5307 |
| | | 1st Year Program'd: 2022 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

Detailed Description: To achieve a region where all kids and youth are able to safely, affordably, and efficiently access school and their community by walking, biking, and transit, the Metro SRTS Program promotes collaboration between SRTS practitioners, provides technical assistance to support new & existing programs, and supports the growth of sustainable funding for SRTS. **(FY 2022 allocation year)**

STIP Description: Through planning funding and outreach activities, promotes the ability for youth to safely, affordably, and efficiently access school by walking, biking, and transit.

Last Amendment of Modification: None. This is the first amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 530,450 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 530,450 | \$ 530,450 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 530,450 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 60,712 | \$ - |
| Local | Match | 2025 | | | | | \$ 60,712 | \$ 60,712 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 60,712 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 591,162 | \$ 591,162 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 591,162 | \$ 591,162 |
| Year Of Expenditure (YOE): | | | | | | | | \$ 591,162 |

Notes and Summary of Changes:

> Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment reprograms the planned FY 2022 UPWP SRTS project out to FY 2025 to avoid conflicts with the annual Obligation Targets program. When the UPWP is approved and the funds are required, they will be advanced forward into the applicable obligation year.

> Will Performance Measurements Apply: No

RTP References:

> RTP ID: 12021 - Regional Safe Routes to School Program for 2018-2027

> RTP Description: Through the Regional Travel Options program, funding is allocated to school districts and other partners to implement ongoing educational programs in schools that encourage children to walk and bicycle to school.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other, Planning and technical studies.

> UPWP amendment: Future - Yes

> RTP Goals: Goal #3 - Transportation Choices

> Goal Objective: Objective 3.1 Travel Choices

> Goal Description: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit.

Fund Codes:

> STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .

> Local = General local funds provided by the lead agency as part of the required match.

Other

> On NHS: No

> Metro Model: N/A - Planning effort

> Model category and type: N/A

> TCM project: No

> Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push out the project to FY 2025

| | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------------------|----------|--|-------------------|------------------|
| Lead Agency: Metro | | Project Type: | Planning | | ODOT Key: | 22161 |
| Project Name: Safe Routes to Schools Program (FFY 2023) | 2 | ODOT Type | Planning | | MTIP ID: | 71114 |
| | | Performance Meas: | No | | Status: | 0 |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: | No | | Comp Date: | 9/30/2025 |
| | | Conformity Exempt: | Yes | | RTP ID: | 12021 |
| Short Description: Promotes through planning, funding and outreach activities the ability for youth to safely, affordably and efficiently access school by walking, biking and transit. (FY 2023 allocation year) | | On State Hwy Sys: | No | | RFFA ID: | 50405 |
| | | Mile Post Begin: | N/A | | RFFA Cycle: | 2022-24 |
| | | Mile Post End: | N/A | | UPWP: | Yes |
| | | Length: | N/A | | UPWP Cycle: | SFY 23-24 |
| | | Flex Transfer to FTA | Yes | | Transfer Code | 5307 |
| | | 1st Year Program'd: | 2023 | | Past Amend: | 0 |
| | | Years Active: | 0 | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | MTIP Amnd #: | JN21-11-JUN |

Detailed Description: To achieve a region where all kids and youth are able to safely, affordably, and efficiently access school and their community by walking, biking, and transit, the Metro SRTS Program promotes collaboration between SRTS practitioners, provides technical assistance to support new & existing programs, and supports the growth of sustainable funding for SRTS. (FY 2023 allocation year)

STIP Description: Through planning funding and outreach activities, promotes the ability for youth to safely, affordably, and efficiently access school by walking, biking, and transit.

Last Amendment of Modification: None. This is the first amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2023 | | | | | \$ 546,364 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 546,364 | \$ 546,364 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 546,364 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 62,534 | \$ - |
| Local | Match | 2025 | | | | | \$ 62,534 | \$ 62,534 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 62,534 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 608,898 | \$ 608,898 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 608,898 | \$ 608,898 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 608,898 |

Notes and Summary of Changes:

> Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment reprograms the planned FY 2023 UPWP SRTS project out to FY 2025 to avoid conflicts with the annual Obligation Targets program. When the UPWP is approved and the funds are required, they will be advanced forward into the applicable obligation year.

> Will Performance Measurements Apply: No

RTP References:

> RTP ID: 12021 - Regional Safe Routes to School Program for 2018-2027

> RTP Description: Through the Regional Travel Options program, funding is allocated to school districts and other partners to implement ongoing educational programs in schools that encourage children to walk and bicycle to school.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other, Planning and technical studies.

> UPWP amendment: Future - Yes

> RTP Goals: Goal #3 - Transportation Choices

> Goal Objective: Objective 3.1 Travel Choices

> Goal Description: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit.

Fund Codes:

> STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .

> Local = General local funds provided by the lead agency as part of the required match.

Other

> On NHS: No

> Metro Model: N/A - Planning effort

> Model category and type: N/A

> TCM project: No

> Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push out the project to FY 2025

| | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------------------------|-----------------------------|
| Lead Agency: Metro | | Project Type: Planning | ODOT Key: 22162 |
| Project Name: Safe Routes to Schools Program (FFY 2024) | 3 | ODOT Type: Planning | MTIP ID: 71110 |
| | | Performance Meas: No | Status: 0 |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: No | Comp Date: 9/30/2025 |
| | | Conformity Exempt: Yes | RTP ID: 12021 |
| Short Description: Promotes through planning, funding and outreach activities the ability for youth to safely, affordably and efficiently access school by walking, biking and transit. (FY 2024 allocation year) | | On State Hwy Sys: No | RFFA ID: 50401 |
| | | Mile Post Begin: N/A | RFFA Cycle: 2022-24 |
| | | Mile Post End: N/A | UPWP: Yes |
| | | Length: N/A | UPWP Cycle: SFY 24-25 |
| | | Flex Transfer to FTA: Yes | Transfer Code: 5307 |
| | | 1st Year Program'd: 2024 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

Detailed Description: To achieve a region where all kids and youth are able to safely, affordably, and efficiently access school and their community by walking, biking, and transit, the Metro SRTS Program promotes collaboration between SRTS practitioners, provides technical assistance to support new & existing programs, and supports the growth of sustainable funding for SRTS. (FY 2024 allocation year)

STIP Description: Through planning funding and outreach activities, promotes the ability for youth to safely, affordably, and efficiently access school by walking, biking, and transit.

Last Amendment of Modification: None. This is the first amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2024 | | | | | \$ 562,754 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 562,754 | \$ 562,754 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 562,754 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2024 | | | | | \$ 64,410 | \$ - |
| Local | Match | 2025 | | | | | \$ 64,410 | \$ 64,410 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 64,410 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 627,164 | \$ 627,164 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 627,164 | \$ 627,164 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 627,164 |

Notes and Summary of Changes:

> Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment reprograms the planned FY 2024 UPWP SRTS project out to FY 2025 to avoid conflicts with the annual Obligation Targets program. When the UPWP is approved and the funds are required, they will be advanced forward into the applicable obligation year.

> Will Performance Measurements Apply: No

RTP References:

> RTP ID: 12021 - Regional Safe Routes to School Program for 2018-2027

> RTP Description: Through the Regional Travel Options program, funding is allocated to school districts and other partners to implement ongoing educational programs in schools that encourage children to walk and bicycle to school.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other, Planning and technical studies.

> UPWP amendment: Future - Yes

> RTP Goals: Goal #3 - Transportation Choices

> Goal Objective: Objective 3.1 Travel Choices

> Goal Description: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit.

Fund Codes:

> STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .

> Local = General local funds provided by the lead agency as part of the required match.

Other

> On NHS: No

> Metro Model: N/A - Planning effort

> Model category and type: N/A

> TCM project: No

> Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out the programming years to
 FY 2025

| | | | |
|--------------------------------------------------------------------------------------------------------|---|--------------------------|------------------------------|
| Lead Agency: Metro | | Project Type: Planning | ODOT Key: 22172 |
| Project Name: Statewide Travel Survey | 4 | ODOT Type: Operations | MTIP ID: 71105 |
| | | Performance Meas: No | Status: 0 |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: No | Comp Date: 12/31/2025 |
| | | Conformity Exempt: Yes | RTP ID: 11103 |
| Short Description: Contribution to statewide travel survey to inform travel forecasting models. | | On State Hwy Sys: No | RFFA ID: 50395 |
| | | Mile Post Begin: N/A | RFFA Cycle: 2022-24 |
| | | Mile Post End: N/A | UPWP: Yes |
| | | Length: N/A | UPWP Cycle: SFY 22-23 |
| | | Flex Transfer to FTA: No | Transfer Code: N/A |
| | | 1st Year Program'd: 2022 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

Detailed Description: Metro region contribution to the statewide travel survey. This survey is conducted once in approximately every decade to understand the people's travel behavior. The project will be coordinated through the Oregon Model Steering Committee. Survey results are used to in both statewide and MPO area travel models to predict travel behavior for both system, modal and project planning activities.

STIP Description: Contribution to statewide travel survey to inform travel forecasting models. Region: 1MPO: Portland Metro MPO Work

Last Amendment of Modification:

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 350,000 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 350,000 | \$ 350,000 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 350,000 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 40,059 | \$ - |
| Local | Match | 2025 | | | | | \$ 40,059 | \$ 40,059 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 40,059 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 390,059 | \$ 390,059 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 390,059 | \$ 390,059 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 390,059 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Project slip due to the need to avoid Obligation Target issues

Amendment Summary:

The formal amendment reprograms the project from FY 2022 to FY 2025 to avoid possible conflicts with the annual Obligation Targets program. When the funds are required, they will be included into the specific annual UPWP and advanced forward to that specific obligation year.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11103 - Regional MPO Activities for 2018-2027
- > RTP Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: Yes - Future
- > RTP Goals: Goal 11 - Transparency and Accountability
- > Goal Objective: Objective 11.2 - Performance Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: N/A - Planning
- > Metro Model: N/A - Planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: N/A



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out the programming years to
 FY 2025

| | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--------------------------|------------------------------|
| Lead Agency: Metro | | Project Type: Planning | ODOT Key: 22163 |
| Project Name: Transit Oriented Development (TOD) program (FFY 2022) | 5 | ODOT Type: Transit | MTIP ID: 71102 |
| | | Performance Meas: No | Status: 0 |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: No | Comp Date: 12/31/2025 |
| | | Conformity Exempt: Yes | RTP ID: 11103 |
| Short Description: Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2022 allocation year) | | On State Hwy Sys: No | RFFA ID: 50392 |
| | | Mile Post Begin: N/A | RFFA Cycle: 2022-24 |
| | | Mile Post End: N/A | UPWP: Yes |
| | | Length: N/A | UPWP Cycle: SFY 22-23 |
| | | Flex Transfer to FTA: No | Transfer Code: N/A |
| | | 1st Year Program'd: 2022 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

Detailed Description: Metro region contribution to the statewide travel survey. This survey is conducted once in approximately every decade to understand the people's travel behavior. The project will be coordinated through the Oregon Model Steering Committee. Survey results are used to in both statewide and MPO area travel models to predict travel behavior for both system, modal and project planning activities. (FY 2022 allocation year)

STIP Description: Contribution to statewide travel survey to inform travel forecasting models. Region: 1 MPO: Portland Metro MPO Work

Last Amendment of Modification:

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 3,495,507 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 3,495,507 | \$ 3,495,507 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 3,495,507 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 400,076 | \$ - |
| Local | Match | 2025 | | | | | \$ 400,076 | \$ 400,076 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 400,076 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 3,895,583 | \$ 3,895,583 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 3,895,583 | \$ 3,895,583 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 3,895,583 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Project slip due to the need to avoid Obligation Target issues

Amendment Summary:

The formal amendment reprograms the project from FY 2022 to FY 2025 to avoid possible conflicts with the annual Obligation Targets program. When the funds are required, they will be included into the specific annual UPWP and advanced forward to that specific obligation year.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11103 - Regional MPO Activities for 2018-2027
- > RTP Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: Yes - Future
- > RTP Goals: Goal 11 - Transparency and Accountability
- > Goal Objective: Objective 11.2 - Performance Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: N/A - Planning
- > Metro Model: N/A - Planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: N/A



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out the programming years to
 FY 2025

| | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--------------------------|------------------------------|
| Lead Agency: Metro | | Project Type: Planning | ODOT Key: 22164 |
| Project Name: Transit Oriented Development (TOD) program (FFY 2023) | 6 | ODOT Type: Transit | MTIP ID: 71103 |
| | | Performance Meas: No | Status: 0 |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: No | Comp Date: 12/31/2025 |
| | | Conformity Exempt: Yes | RTP ID: 11103 |
| Short Description: Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2023 allocation year) | | On State Hwy Sys: No | RFFA ID: 50393 |
| | | Mile Post Begin: N/A | RFFA Cycle: 2022-24 |
| | | Mile Post End: N/A | UPWP: Yes |
| | | Length: N/A | UPWP Cycle: SFY 23-24 |
| | | Flex Transfer to FTA: No | Transfer Code: N/A |
| | | 1st Year Program'd: 2023 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

Detailed Description: Metro region contribution to the statewide travel survey. This survey is conducted once in approximately every decade to understand the people's travel behavior. The project will be coordinated through the Oregon Model Steering Committee. Survey results are used to in both statewide and MPO area travel models to predict travel behavior for both system, modal and project planning activities. (FY 2023 allocation year)

STIP Description: Contribution to statewide travel survey to inform travel forecasting models. Region: 1 MPO: Portland Metro MPO Work

Last Amendment of Modification:

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|-------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2023 | | | | | \$ 3,600,373 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 3,600,373 | \$ 3,600,373 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 3,600,373 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 412,079 | \$ - |
| Local | Match | 2025 | | | | | \$ 412,079 | \$ 412,079 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 412,079 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 4,012,452 | \$ 4,012,452 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 4,012,452 | \$ 4,012,452 |
| Year Of Expenditure (YOE): | | | | | | | | \$ 4,012,452 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Project slip due to the need to avoid Obligation Target issues

Amendment Summary:

The formal amendment reprograms the project from FFY 2023 to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. When the funds are required, they will be included into the specific annual UPWP and advanced forward to that specific obligation year.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11103 - Regional MPO Activities for 2018-2027
- > RTP Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: Yes - Future
- > RTP Goals: Goal 11 - Transparency and Accountability
- > Goal Objective: Objective 11.2 - Performance Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: N/A - Planning
- > Metro Model: N/A - Planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: N/A



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out the programming years to
 FY 2025

| | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------------------|----------|------------------------------|--|
| Lead Agency: Metro | | Project Type: | Planning | ODOT Key: 22165 | |
| Project Name: Transit Oriented Development (TOD) program (FFY 2024) | 7 | ODOT Type | Transit | MTIP ID: 71104 | |
| | | Performance Meas: | No | Status: 0 | |
| Project Status: 0 = No activity (Planning) | | Capacity Enhancing: | No | Comp Date: 12/31/2025 | |
| | | Conformity Exempt: | Yes | RTP ID: 11103 | |
| Short Description: Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2024 allocation year) | | On State Hwy Sys: | No | RFFA ID: 50394 | |
| | | Mile Post Begin: | N/A | RFFA Cycle: 2022-24 | |
| | | Mile Post End: | N/A | UPWP: Yes | |
| | | Length: | N/A | UPWP Cycle: SFY 24-25 | |
| | | Flex Transfer to FTA | Yes | Transfer Code: 5307 | |
| | | 1st Year Program'd: | 2024 | Past Amend: 0 | |
| | | Years Active: | 0 | OTC Approval: No | |
| | | STIP Amend #: TBD | | MTIP Amnd #: JN21-11-JUN | |

Detailed Description: Metro region contribution to the statewide travel survey. This survey is conducted once in approximately every decade to understand the people's travel behavior. The project will be coordinated through the Oregon Model Steering Committee. Survey results are used to in both statewide and MPO area travel models to predict travel behavior for both system, modal and project planning activities. (FY 2024 allocation year)

STIP Description: Contribution to statewide travel survey to inform travel forecasting models. Region: 1 MPO: Portland Metro MPO Work

Last Amendment of Modification:

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2024 | | | | | \$ 3,708,384 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 3,708,384 | \$ 3,708,384 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 3,708,384 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 424,441 | \$ - |
| Local | Match | 2025 | | | | | \$ 424,441 | \$ 424,441 |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ 424,441 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 4,132,825 | \$ 4,132,825 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 4,132,825 | \$ 4,132,825 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 4,132,825 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Project slip due to the need to avoid Obligation Target issues

Amendment Summary:

The formal amendment reprograms the project from FFY 2024 to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. When the funds are required, they will be included into the specific annual UPWP and advanced forward to that specific obligation year.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11103 - Regional MPO Activities for 2018-2027
- > RTP Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: Yes - Future
- > RTP Goals: Goal 11 - Transparency and Accountability
- > Goal Objective: Objective 11.2 - Performance Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: N/A - Planning
- > Metro Model: N/A - Planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: N/A



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------------------|----------|------------------------------|--|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | ODOT Key: 22169 | |
| Project Name: TSMO Administration (FFY 2022) | 8 | ODOT Type | ITS | MTIP ID: 71124 | |
| | | Performance Meas: | No | Status: 0 | |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | Comp Date: 12/31/2025 | |
| | | Conformity Exempt: | Yes | RTP ID: 11104 | |
| Short Description: Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2022 allocation year) | | On State Hwy Sys: | No | RFFA ID: N/A | |
| | | Mile Post Begin: | N/A | RFFA Cycle: N/A | |
| | | Mile Post End: | N/A | UPWP: Yes | |
| | | Length: | N/A | UPWP Cycle: SFY 22-23 | |
| | | Flex Transfer to FTA | No | Transfer Code: N/A | |
| | | 1st Year Program'd: | 2022 | Past Amend: 0 | |
| | | Years Active: | 0 | OTC Approval: No | |
| | | STIP Amend #: TBD | | MTIP Amnd #: JN21-11-JUN | |

Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects (See MTIP ID 71115/RFFA ID 50406). This is for the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2022 allocation year)

STIP Description: TBD

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 188,707 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 188,707 | \$ 188,707 |
| | | | | | | | Federal Totals: | \$ 188,707 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 21,598 | \$ - |
| Local | Match | 2025 | | | | | \$ 21,598 | \$ 21,598 |
| | | | | | | | Local Total | \$ 21,598 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 210,305 | \$ 210,305 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 210,305 | \$ 210,305 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 210,305 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO admin FFY 2022 allocation to FFY 2025. Re-commit to SFY 22-23 UPWP next year.

Amendment Summary:

- The formal amendment reprograms the TSMO FY 2022 admin funding allocation to FY 2025 to avoid conflicts with the annual Obligation Targets program
- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies.
- > UPWP amendment: Future - Yes
- > RTP Goals: Goal 11 - Transparency and accountability
- > Goal Objective: Objective 11.2 - Performance-Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A - supports UPWP planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------------------|----------|------------------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | ODOT Key: 22170 |
| Project Name: TSMO Administration (FFY 2023) | 9 | ODOT Type | ITS | MTIP ID: 71125 |
| | | Performance Meas: | No | Status: 0 |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | Comp Date: 12/31/2025 |
| | | Conformity Exempt: | Yes | RTP ID: 11104 |
| Short Description: Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year) | | On State Hwy Sys: | No | RFFA ID: N/A |
| | | Mile Post Begin: | N/A | RFFA Cycle: N/A |
| | | Mile Post End: | N/A | UPWP: Yes |
| | | Length: | N/A | UPWP Cycle: SFY 23-24 |
| | | Flex Transfer to FTA | No | Transfer Code: N/A |
| | | 1st Year Program'd: | 2023 | Past Amend: 0 |
| | | Years Active: | 0 | OTC Approval: No |
| | | STIP Amend #: | TBD | |

Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects (See MTIP ID 71115/RFFA ID 50406). This is for the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)

STIP Description: TBD

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2023 | | | | | \$ 194,369 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 194,369 | \$ 194,369 |
| | | | | | | | Federal Totals: | \$ 194,369 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 22,246 | \$ - |
| Local | Match | 2025 | | | | | \$ 22,246 | \$ 22,246 |
| | | | | | | | Local Total | \$ 22,246 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 216,615 | \$ 216,615 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 216,615 | \$ 216,615 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 216,615 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO admin FY 2023 allocation to FY 2025. Re-commit to SFY 23-24 UPWP next year.

Amendment Summary:

- The formal amendment reprograms the TSMO FY 2023 admin funding allocation to FY 2025 to avoid conflicts with the annual Obligation Targets program
- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies.
- > UPWP amendment: Future - Yes
- > RTP Goals: Goal 11 - Transparency and accountability
- > Goal Objective: Objective 11.2 - Performance-Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A - supports UPWP planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------|----------|------------------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | ODOT Key: 22171 |
| Project Name: TSMO Administration (FFY 2024) | 10 | ODOT Type | ITS | MTIP ID: 71126 |
| | | Performance Meas: | No | Status: 0 |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | Comp Date: 12/31/2025 |
| | | Conformity Exempt: | Yes | RTP ID: 11104 |
| Short Description: Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2024 allocation year) | | On State Hwy Sys: | No | RFFA ID: N/A |
| | | Mile Post Begin: | N/A | RFFA Cycle: N/A |
| | | Mile Post End: | N/A | UPWP: Yes |
| | | Length: | N/A | UPWP Cycle: SFY 24-25 |
| | | Flex Transfer to FTA | No | Transfer Code: N/A |
| | | 1st Year Program'd: | 2024 | Past Amend: 0 |
| | | Years Active: | 0 | OTC Approval: No |
| | | STIP Amend #: TBD | | |

Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects (See MTIP ID 71115/RFFA ID 50406). This is for the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2024 allocation year)

STIP Description: TBD

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2024 | | | | | \$ 200,200 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 200,200 | \$ 200,200 |
| | | | | | | | Federal Totals: | \$ 200,200 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2024 | | | | | \$ 22,914 | \$ - |
| Local | Match | 2025 | | | | | \$ 22,914 | \$ 22,914 |
| | | | | | | | Local Total | \$ 22,914 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 223,114 | \$ 223,114 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 223,114 | \$ 223,114 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 223,114 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO admin FFY 2024 allocation to FFY 2025. Re-commit to SFY 24-25 UPWP next year.

Amendment Summary:

- The formal amendment reprograms the TSMO FFY 2024 admin funding allocation to FY 2025 to avoid conflicts with the annual Obligation Targets program
- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies.
- > UPWP amendment: Future - Yes
- > RTP Goals: Goal 11 - Transparency and accountability
- > Goal Objective: Objective 11.2 - Performance-Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A - supports UPWP planning
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------------------|----------|--|--|-------------------|-------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | | | ODOT Key: | 22166 |
| Project Name: TSMO Program Sub-allocation Funds (FFY 2022) | 11 | ODOT Type | ITS | | | MTIP ID: | 71115 |
| | | Performance Meas: | No | | | Status: | 0 |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | | | Comp Date: | 12/31/2025 |
| | | Conformity Exempt: | Yes | | | RTP ID: | 12024 |
| Short Description: Regional Transportation System Management & Operations (TSMO) program. (FY 2022 allocation year) | | On State Hwy Sys: | No | | | RFFA ID: | 50406 |
| | | Mile Post Begin: | N/A | | | RFFA Cycle: | 2022-24 |
| | | Mile Post End: | N/A | | | UPWP: | No |
| | | Length: | N/A | | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2022 | | | Past Amend: | 0 |
| | | Years Active: | 0 | | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | | MTIP Amnd #: | JN21-11-JUN |
| Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effective. It also includes the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2022 allocation year) | | | | | | | |
| STIP Description: Regional Transportation System Management & Operations (TSMO) program. | | | | | | | |

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 1,667,158 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 1,667,158 | \$ 1,667,158 |
| | | | | | | | Federal Totals: | \$ 1,667,158 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 190,814 | \$ - |
| Local | Match | 2025 | | | | | \$ 190,814 | \$ 190,814 |
| | | | | | | | Local Total | \$ 190,814 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,857,972 | \$ 1,857,972 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,857,972 | \$ 1,857,972 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 1,857,972 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO PGB in FFY 2022 allocation to FY 2025.

Amendment Summary:

The formal amendment reprograms the TSMO FFY 2022 project grouping bucket allocation to FFY 2025 to avoid conflicts with the annual Obligation Targets program. As the TSMO program awards specific projects, the required funding award is obtained from these PGBs which were repositioned over a three-year period. Now, the funding will be drawn down for the specific project from the applicable PGB in FY 2025.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12024 - Regional TSMO Corridors Priority Investments for 2018-2027
- > RTP Description: Through the regional TSMO program, provide funding for operators to work together to deploy safe, integrated corridor management with advanced technology in regional mobility corridors including decision support systems, real-time traveler information on route choice and estimated travel time that uses a variety of data sensors, software and systems (e.g., smart mobility hubs, internet of things, connected and automated vehicles). This also includes deployment of innovative technology systems, automated corridor management, and other active traffic management strategies.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety- Traffic control devices and operating assistance other than signalization projects..
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------|----------|--|--|-------------------|-------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | | | ODOT Key: | 22167 |
| Project Name: TSMO Program Sub-allocation Funds (FFY 2023) | 12 | ODOT Type | ITS | | | MTIP ID: | 71116 |
| | | Performance Meas: | No | | | Status: | 0 |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | | | Comp Date: | 12/31/2025 |
| | | Conformity Exempt: | Yes | | | RTP ID: | 12024 |
| Short Description: Regional Transportation System Management & Operations (TSMO) program. (FY 2023 allocation year) | | On State Hwy Sys: | No | | | RFFA ID: | 50407 |
| | | Mile Post Begin: | N/A | | | RFFA Cycle: | 2022-24 |
| | | Mile Post End: | N/A | | | UPWP: | No |
| | | Length: | N/A | | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2023 | | | Past Amend: | 0 |
| | | Years Active: | 0 | | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | | MTIP Amnd #: | JN21-11-JUN |
| <p>Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effectively. It also includes the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)</p> | | | | | | | |
| <p>STIP Description: Regional Transportation System Management & Operations (TSMO) program.</p> | | | | | | | |

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2023 | | | | | \$ 1,717,173 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 1,717,173 | \$ 1,717,173 |
| | | | | | | | Federal Totals: | \$ 1,717,173 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 196,538 | \$ - |
| Local | Match | 2025 | | | | | \$ 196,538 | \$ 196,538 |
| | | | | | | | Local Total | \$ 196,538 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,913,711 | \$ 1,913,711 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,913,711 | \$ 1,913,711 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 1,913,711 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO PGB in FFY 2023 allocation to FFY 2025.

Amendment Summary:

The formal amendment reprograms the TSMO FY 2023 project grouping bucket allocation to FY 2025 to avoid conflicts with the annual Obligation Targets program. As the TSMO program awards specific projects, the required funding award is obtained from these PGBs which were repositioned over a three-year period. Now, the funding will be drawn down for the specific project from the applicable PGB in FFY 2025.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12024 - Regional TSMO Corridors Priority Investments for 2018-2027
- > RTP Description: Through the regional TSMO program, provide funding for operators to work together to deploy safe, integrated corridor management with advanced technology in regional mobility corridors including decision support systems, real-time traveler information on route choice and estimated travel time that uses a variety of data sensors, software and systems (e.g., smart mobility hubs, internet of things, connected and automated vehicles). This also includes deployment of innovative technology systems, automated corridor management, and other active traffic management strategies.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety- Traffic control devices and operating assistance other than signalization projects..
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------------------|----------|--|-------------------|-------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | | ODOT Key: | 22168 |
| Project Name: TSMO Program Sub-allocation Funds (FFY 2024) | 13 | ODOT Type | ITS | | MTIP ID: | 71117 |
| | | Performance Meas: | No | | Status: | 0 |
| Project Status: 0 = no activity | | Capacity Enhancing: | No | | Comp Date: | 12/31/2025 |
| | | Conformity Exempt: | Yes | | RTP ID: | 12024 |
| Short Description: Regional Transportation System Management & Operations (TSMO) program. (FY 2024 allocation year) | | On State Hwy Sys: | No | | RFFA ID: | 50408 |
| | | Mile Post Begin: | N/A | | RFFA Cycle: | 2022-24 |
| | | Mile Post End: | N/A | | UPWP: | No |
| | | Length: | N/A | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2024 | | Past Amend: | 0 |
| | | Years Active: | 0 | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | MTIP Amnd #: | JN21-11-JUN |
| Detailed Description: The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effectively. It also includes the administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2024 allocation year) | | | | | | |
| STIP Description: Regional Transportation System Management & Operations (TSMO) program. | | | | | | |

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2024 | | | | | \$ 1,768,688 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 1,768,688 | \$ 1,768,688 |
| | | | | | | | Federal Totals: | \$ 1,768,688 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2024 | | | | | \$ 202,434 | \$ - |
| Local | Match | 2025 | | | | | \$ 202,434 | \$ 202,434 |
| | | | | | | | Local Total | \$ 202,434 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,971,122 | \$ 1,971,122 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,971,122 | \$ 1,971,122 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 1,971,122 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO PGB in FFY 2024 allocation to FFY 2025.

Amendment Summary:

The formal amendment reprograms the TSMO FFY 2024 project grouping bucket allocation to FFY 2025 to avoid conflicts with the annual Obligation Targets program. As the TSMO program awards specific projects, the required funding award is obtained from these PGBs which were repositioned over a three-year period. Now, the funding will be drawn down for the specific project from the applicable PGB in FFY 2025.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12024 - Regional TSMO Corridors Priority Investments for 2018-2027
- > RTP Description: Through the regional TSMO program, provide funding for operators to work together to deploy safe, integrated corridor management with advanced technology in regional mobility corridors including decision support systems, real-time traveler information on route choice and estimated travel time that uses a variety of data sensors, software and systems (e.g., smart mobility hubs, internet of things, connected and automated vehicles). This also includes deployment of innovative technology systems, automated corridor management, and other active traffic management strategies.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety- Traffic control devices and operating assistance other than signalization projects..
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
REPROGRAM PROJECT
 Push-out UPWP project grouping
 bucket to FY 2025

| | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|--|--|
| Lead Agency: Metro | | Project Type: ITS/TSMO | ODOT Key: 20888 | | |
| Project Name: Transportation System Mgmt Operations/ITS (2021) | 14 | ODOT Type: OP-ITS | MTIP ID: 70875 | | |
| | | Performance Meas: No | Status: 0 | | |
| Project Status: 0 = no activity | | Capacity Enhancing: No | Comp Date: 12/31/2025 | | |
| | | Conformity Exempt: Yes | RTP ID: 12024 | | |
| Short Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2021 allocation year) | | On State Hwy Sys: No | RFFA ID: 50361 | | |
| | | Mile Post Begin: N/A | RFFA Cycle: 2019-21 | | |
| | | Mile Post End: N/A | UPWP: No | | |
| | | Length: N/A | UPWP Cycle: N/A | | |
| | | Flex Transfer to FTA: No | Transfer Code: N/A | | |
| | | 1st Year Program'd: 2021 | Past Amend: 1 | | |
| | | Years Active: 1 | OTC Approval: No | | |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN | | |
| | | Detailed Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee; allocation and implementation of MTIP programming for TSMO; manage regional policy and project development; and oversee performance data development and tracking (FY 2021 allocation year) | | | |
| | | STIP Description: Funding to provide strategic and collaborative program management including coordination of activities for TransPort Transportation System Management and Operations (TSMO) committee. | | | |

Last Amendment of Modification: Administrative - December 2020 - AB21-05-DEC2- Reprogram Other to FY 2022

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 1,801,828 | \$ - |
| STBG-U | Z230 | 2025 | | | | | \$ 1,801,828 | \$ 1,801,828 |
| | | | | | | | Federal Totals: | \$ 1,801,828 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 206,277 | \$ - |
| Local | Match | 2025 | | | | | \$ 206,277 | \$ 206,277 |
| | | | | | | | Local Total | \$ 206,277 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 2,008,105 | \$ 2,008,105 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 2,008,105 | \$ 2,008,105 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 2,008,105 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Slip TSMO PGB in FFY 2022 (allocation year of 2021) to FFY 2025.

Amendment Summary:

- The formal amendment reprograms the TSMO FFY 2022(allocation year of 2021) project grouping bucket allocation to FFY 2025 to avoid conflicts with the annual Obligation Targets program. As the TSMO program awards specific projects, the required funding award is obtained from these PGBs which were repositioned over a three-year period. Now, the funding will be drawn down for the specific project from the applicable PGB in FFY 2025.
- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12024 - Regional TSMO Corridors Priority Investments for 2018-2027
- > RTP Description: Through the regional TSMO program, provide funding for operators to work together to deploy safe, integrated corridor management with advanced technology in regional mobility corridors including decision support systems, real-time traveler information on route choice and estimated travel time that uses a variety of data sensors, software and systems (e.g., smart mobility hubs, internet of things, connected and automated vehicles). This also includes deployment of innovative technology systems, automated corridor management, and other active traffic management strategies.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety- Traffic control devices and operating assistance other than signalization projects..
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
ADD NEW PROJECT
 Add new ADA safety improvement project to the 2021-24 MTIP

| | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------------------------|------------|-------------------|-------------------|
| Lead Agency: ODOT | | Project Type: | Safety/ADA | ODOT Key: | 22431 |
| Project Name: OR141/OR217 Curb Ramps | 15 | ODOT Type | Safety/ADA | MTIP ID: | TBD |
| | | Performance Meas: | No | Status: | 1 |
| Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). | | Capacity Enhancing: | No | Comp Date: | 12/31/2024 |
| | | Conformity Exempt: | Yes | RTP ID: | 12095 |
| Short Description: At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps. | | On State Hwy Sys: | OR141 | RFFA ID: | N/A |
| | | Mile Post Begin: | 2.57 | RFFA Cycle: | N/A |
| | | Mile Post End: | 7.07 | UPWP: | No |
| | | Length: | Various | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | Transfer Code | N/A |
| | | 1st Year Program'd: | 2021 | Past Amend: | 0 |
| | | Years Active: | 0 | OTC Approval: | Yes |
| | | STIP Amend #: 21-24-0761 | | MTIP Amnd #: | JN21-11-JUN |
| Detailed Description: On OR 141 (Hall Blvd at two location between MP 2.57 to 7.07) and on SW 72nd Ave (between SW Beveland Rd to SW Varnes St) in the Tigard area, construct ADA compliant curbs and ramps for safety improvements. (ADA PGB) | | | | | |
| STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards. | | | | | |
| Last Amendment of Modification: None - Initial MTIP programming | | | | | |

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Other (Utility Relocation) | Construction | Total |
|-------------------------------------|-----------|------|----------|-------------------------|--------------|----------------------------|----------------------------|---------------------|
| Federal Funds | | | | | | | | |
| AC-STBGS | ACPO | 2021 | | \$ 851,830 | | | | \$ 851,830 |
| AC-STBGS | ACPO | 2022 | | | \$ 299,730 | | | \$ 299,730 |
| AC-STBGS | ACPO | 2023 | | | | | \$ 1,304,043 | \$ 1,304,043 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 2,455,603 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| State | Match | 2021 | | \$ 97,496 | | | | \$ 97,496 |
| State | Match | 2022 | | | \$ 34,305 | | | \$ 34,305 |
| State | Match | 2023 | | | | | \$ 149,254 | \$ 149,254 |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ 281,055 |
| Local Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Phase Totals After Amend: | | | \$ - | \$ 949,326 | \$ 334,035 | \$ - | \$ 1,453,297 | \$ 2,736,658 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 2,736,658 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Part of the planned ADA improvements during FY 2020-2022 as approved by OTC during their January 2021 meeting.
- > Exemption Status: Project is an exempt, non-capacity enhancing project and is exempt from air quality analysis per 40 CFR 93.126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > Qualifies as a Project Grouping Bucket: Yes. Projects will be NEPA CE, are non-capacity enhancing, and meet exemption status per 40 CFR 93.126, Table 2.

Amendment Summary:

The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements.

- > Will Performance Measurements Apply: Yes, Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity
- > UPWP amendment: No
- > RTP Goals: Goal #5 - Safety and Security
- > Goal Objective: 5.1 - Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBS = Federal Advance Construction placeholder fund type code that is projected to be State STBG when the fund conversion occurs.
- > State = General State funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: Hall Blvd is identified as a Pedestrian Parkway
- > Model category and type: Metro Pedestrian Network
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
ADD NEW PROJECT
 Add new ADA safety improvement project to the 2021-24 MTIP

| | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|--------------------------|------------|--|--------------------------|-------------------|
| Lead Agency: ODOT | | Project Type: | Safety/ADA | | ODOT Key: | 22432 |
| Project Name: US30BY Curb Ramps | 16 | ODOT Type | Safety/ADA | | MTIP ID: | TBD |
| | | Performance Meas: | No | | Status: | 1 |
| Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). | | Capacity Enhancing: | No | | Comp Date: | 12/31/2024 |
| | | Conformity Exempt: | Yes | | RTP ID: | 12095 |
| | | On State Hwy Sys: | US30 | | RFFA ID: | N/A |
| | | Mile Post Begin: | 1.28 | | RFFA Cycle: | N/A |
| | | Mile Post End: | 14.76 | | UPWP: | No |
| | | Length: | Various | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2021 | | Past Amend: | 0 |
| | | Years Active: | 0 | | OTC Approval: | Yes |
| | | STIP Amend #: 21-24-0763 | | | MTIP Amnd #: JN21-11-JUN | |
| Detailed Description: On US30 Bypass at multiple locations between MP 1.28 to 14.76) in the NE Portland area, construct ADA compliant curbs and ramps for safety improvements. (ADA PGB) | | | | | | |
| STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards. | | | | | | |
| Last Amendment of Modification: None - Initial MTIP programming | | | | | | |

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Other (Utility Relocation) | Construction | Total |
|-------------------------------------|-----------|------|----------|-------------------------|--------------|----------------------------|----------------------------|----------------------|
| Federal Funds | | | | | | | | |
| AC-STBGS | ACPO | 2021 | | \$ 5,361,060 | | | | \$ 5,361,060 |
| AC-STBGS | ACPO | 2022 | | | \$ 1,886,370 | | | \$ 1,886,370 |
| AC-STBGS | ACPO | 2023 | | | | | \$ 8,207,099 | \$ 8,207,099 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 15,454,529 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| State | Match | 2021 | | \$ 613,597 | | | | \$ 613,597 |
| State | Match | 2022 | | | \$ 215,904 | | | \$ 215,904 |
| State | Match | 2023 | | | | | \$ 939,339 | \$ 939,339 |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ 1,768,840 |
| Local Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Phase Totals After Amend: | | | \$ - | \$ 5,974,657 | \$ 2,102,274 | \$ - | \$ 9,146,438 | \$ 17,223,369 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 17,223,369 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Part of the planned ADA improvements during FY 2020-2022 as approved by OTC during their January 2021 meeting.
- > Exemption Status: Project is an exempt, non-capacity enhancing project and is exempt from air quality analysis per 40 CFR 93.126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > Qualifies as a Project Grouping Bucket: Yes. Projects will be NEPA CE, are non-capacity enhancing, and meet exemption status per 40 CFR 93.126, Table 2.

Amendment Summary:

The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements

- > Will Performance Measurements Apply: Yes, Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity
- > UPWP amendment: No
- > RTP Goals: Goal #5 - Safety and Security
- > Goal Objective: 5.1 - Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBS = Federal Advance Construction placeholder fund type code that is projected to be State STBG when the fund conversion occurs.
- > State = General State funds provided by the lead agency as part of the required match.

Other

- > On NHS: Yes - MAP21 NHS Principal Arterials
- > Metro Model: Hall Blvd is identified as a Pedestrian Parkway
- > Model category and type: Metro Pedestrian Network
- > TCM project: No
- > Located on the CMP: Yes



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
LIMITS CORRECTION
Update project name and limits
based on updated Charter

| | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|-------------------------------------------|------------------------------|
| Lead Agency: ODOT | | Project Type: Safety | ODOT Key: 21616 |
| Project Name: OR99W: OR217 SW Sunset Blvd & US30B: Kerby 162nd Ave OR99W: N Schmeer Rd SW Meinecke Pkwy & US30B: Kerby 165th Ave | 17 | ODOT Type: Safety | MTIP ID: 71170 |
| | | Performance Meas: No | Status: 4 |
| | | Capacity Enhancing: No | Comp Date: 12/31/2024 |
| | | Conformity Exempt: Yes | RTP ID: 12095 |
| Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated). | US30 | On State Hwy Sys: OR99W | RFFA ID: N/A |
| Short Description: Upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. | 5.52 5.60 | Mile Post Begin: 8.71 -5.71 | RFFA Cycle: N/A |
| | 14.53 14.70 | Mile Post End: 16.90 15.95 | UPWP: No |
| | 9.01 9.10 | Length: 7.99 21.15 | UPWP Cycle: N/A |
| | | Flex Transfer to FTA: No | Transfer Code: N/A |
| | | 1st Year Program'd: 2021 | Past Amend: 0 |
| | | Years Active: 1 | OTC Approval: No |
| | | STIP Amend #: 21-24-0783 | MTIP Amnd #: JN21-11-JUN |
| Detailed Description: On OR99W from -5.71 to 15.95 and on US30 from 5.60 to 14.70, install various safety improvements including upgrading signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. | | | |
| STIP Description: Upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. | | | |

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Other (Utility Relocation) | Construction | Total |
|-------------------------------------|-----------|------|----------|-------------------------|--------------|----------------------------|------------------------|---------------------|
| Federal Funds | | | | | | | | |
| HSIP | ZS30 | 2021 | | \$ 429,860 | | | | \$ - |
| HSIP | ZS30 | 2022 | | | \$ 69,856 | | | \$ 69,856 |
| HSIP | ZS30 | 2023 | | | | \$ 11,685 | | \$ 11,685 |
| HSIP | ZS30 | 2023 | | | | | \$ 1,790,223 | \$ 1,790,223 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 1,871,764 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| State | Match | 2021 | | \$ 36,264 | | | | \$ 36,264 |
| State | Match | 2022 | | | \$ 5,893 | | | \$ 5,893 |
| State | Match | 2023 | | | | \$ 986 | | \$ 986 |
| State | Match | 2023 | | | | | \$ 151,030 | \$ 151,030 |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ 194,173 |
| Local Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ 466,124 | \$ 75,749 | \$ 12,671 | \$ 1,941,253 | \$ 2,495,797 |
| Phase Totals After Amend: | | | \$ - | \$ 466,124 | \$ 75,749 | \$ 12,671 | \$ 1,941,253 | \$ 2,495,797 |
| Year Of Expenditure (YOE): | | | | | | | | \$ 2,495,797 |

Notes and Summary of Changes:

> Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

>

Amendment Summary:

The formal amendment updates the project name based on revised project limits MPs to match the approved charter when CMR-00 was processed. The limits are adjusted significantly, but the scope remains unchanged.

> Will Performance Measurements Apply: Yes - Safety

RTP References:

> RTP ID: 12095 - Safety & Operations Projects

> RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 -Safety, Highway Safety Improvement Program implementation.

> UPWP amendment: No

> RTP Goals: Goal 5 Safety and Security

> Goal Objective: Objective 5.1 - Transportation Safety

> Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

> HSIP =Federal Highway Safety Improvement Program funds appropriated to ODOT fir safety related improvements

>State = General state funds provided by the lead agency as part of the required match.

Other

> On NHS: Yes

> Metro Model: Yes. The safety improvement are located on a defined Throughway and Principal Arterial in the Motor Vehicle network

> Model category and type: Throughway and Principal Arterial

> TCM project: No

> Located on the CMP: Yes



Metro
2021-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
SPLIT/COMBINE
Split and combine remaining funds
to ODOT ATC project

| | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------|----------|--|-------------------|------------------|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | | ODOT Key: | 20884 |
| Project Name: Transportation System Mgmt Operations/ITS (2019) | 18 | ODOT Type | ITS | | MTIP ID: | 70875 |
| | | Performance Meas: | No | | Status: | 7 |
| Project Status: 7 = Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated. | | Capacity Enhancing: | No | | Comp Date: | 6/30/2021 |
| | | Conformity Exempt: | Yes | | RTP ID: | 11104 |
| Short Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee | | On State Hwy Sys: | No | | RFFA ID: | 50361 |
| | | Mile Post Begin: | N/A | | RFFA Cycle: | 2019-21 |
| | | Mile Post End: | N/A | | UPWP: | No |
| | | Length: | N/A | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2021 | | Past Amend: | 4 |
| | | Years Active: | 0 | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | MTIP Amnd #: | JN21-11-JUN |
| Detailed Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee; allocation and implementation of MTIP programming for TSMO; manage regional policy and project development; and oversee performance data development and tracking. | | | | | | |
| STIP Description: Funding to provide strategic and collaborative program management including coordination of activities for TransPort Transportation System Management and Operations (TSMO) committee. | | | | | | |

Last Amendment of Modification: Formal, January 2021, JN21-06-JAN - SPLIT FUNDS: The formal amendment splits off and commits \$1,151,936 of STBG-U to the new Washington County Advance Traffic Controller (ATC) upgrade project to the 2021-24 MTIP

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|------------------------|---------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 5,760 | \$ 5,760 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 5,760 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 659 | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 6,419 | \$ 6,419 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Year Of Expenditure (YOE): | | | | | | | | \$ - |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Transfer remaining funds to ODOT's new ATC TSMO award.

Amendment Summary:

The formal amendment commits the remaining funds in this TSMO PGB to ODOT's new ATC project (included in this amendment bundle). As a result, Key 20884 is now zero programmed All funds have now been committed to TSMO projects.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving "big data" processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Traffic control devices and operating assistance other than signalization projects.
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 - Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
SPLIT/COMBINE
 Split and combine remaining funds
 to ODOT ATC project

| | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------------------------|--|
| Lead Agency: Metro | | Project Type: | ITS/TSMO | ODOT Key: 20885 | |
| Project Name: Transportation System Mgmt Operations/ITS (2020) | 19 | ODOT Type | ITS | MTIP ID: 70875 | |
| | | Performance Meas: | No | Status: 7 | |
| Project Status: 7 = Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated. | | Capacity Enhancing: | No | Comp Date: 9/30/2025 | |
| | | Conformity Exempt: | Yes | RTP ID: 11104 | |
| Short Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee (FY 2020 allocation year) | | On State Hwy Sys: | No | RFFA ID: 50361 | |
| | | Mile Post Begin: | N/A | RFFA Cycle: 2019-21 | |
| | | Mile Post End: | N/A | UPWP: No | |
| | | Length: | N/A | UPWP Cycle: N/A | |
| | | Flex Transfer to FTA | No | Transfer Code: N/A | |
| | | 1st Year Program'd: | 2020 | Past Amend: 2 | |
| | | Years Active: | 2 | OTC Approval: No | |
| | | STIP Amend #: | TBD | MTIP Amnd #: JN21-11-JUN | |
| | | Detailed Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee; allocation and implementation of MTIP programming for TSMO; manage regional policy and project development; and oversee performance data development and tracking. (FY 2020 allocation year) | | | |
| | | STIP Description: Funding to provide strategic and collaborative program management including coordination of activities for TransPort Transportation System Management and Operations (TSMO) committee. | | | |

Last Amendment of Modification: Administrative - AB21-05-DEC2, Reprogram Planning to FY 2022

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|----------------------------|-------------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2022 | | | | | \$ 1,744,598 | \$ 1,744,598 |
| STBG-U | Z230 | 2025 | | | | | \$ 1,510,851 | \$ 1,510,851 |
| | | | | | | | Federal Totals: | \$ 3,255,449 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2022 | | | | | \$ 199,677 | \$ - |
| Local | Match | 2025 | | | | | \$ 172,924 | \$ 172,924 |
| | | | | | | | Local Total | \$ 172,924 |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,944,275 | \$ 1,944,275 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 1,683,775 | \$ 1,683,775 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 1,683,775 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Transfer \$233,747 of STBG-U (and match) to new ODOT ATC TSMO awarded project

Amendment Summary:

The formal amendment splits \$233,747 of STBG and required match to ODOT's new ATC project (included in this amendment bundle). As a result, Key 20885 decreases from \$1,745,257 to \$1,683,775. The programming years are being pushed-out to FY 2025 as well to avoid conflicts with the Obligation Targets program.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving "big data" processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Traffic control devices and operating assistance other than signalization projects.
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 - Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: N/A
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
ADD NEW PROJECT
Add new TSMO ATC upgrade & deployment project for ODOT

| | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------|----------|--|--|-------------------|-------------------|
| Lead Agency: ODOT | | Project Type: | ITS/TSMO | | | ODOT Key: | NEW - TBD |
| Project Name: Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy | 20 | ODOT Type | ITS | | | MTIP ID: | NEW-TBD |
| | | Performance Meas: | No | | | Status: | 1 |
| Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). | | Capacity Enhancing: | No | | | Comp Date: | 12/31/2022 |
| | | Conformity Exempt: | Yes | | | RTP ID: | 11104 |
| Short Description: Purchase Advanced Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing at various locations in Region 1 | | On State Hwy Sys: | No | | | RFFA ID: | N/A |
| | | Mile Post Begin: | N/A | | | RFFA Cycle: | N/A |
| | | Mile Post End: | N/A | | | UPWP: | No |
| | | Length: | N/A | | | UPWP Cycle: | N/A |
| | | Flex Transfer to FTA | No | | | Transfer Code | N/A |
| | | 1st Year Program'd: | 2021 | | | Past Amend: | 0 |
| | | Years Active: | 0 | | | OTC Approval: | No |
| | | STIP Amend #: | TBD | | | MTIP Amnd #: | JN21-11-JUN |
| Detailed Description: Throughout Region 1 at various locations, deploy and install new Advance Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing to support the ongoing Next Generation Transit Signal Priority Project, for smarter signal priority. | | | | | | | |
| STIP Description: TBD | | | | | | | |

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-------------------------------------|-----------|------|----------|-------------------------|--------------|--------------|------------------------|-------------------|
| Federal Funds | | | | | | | | |
| STBG-U | 2230 | 2021 | | | | | \$ 239,507 | \$ 239,507 |
| | | | | | | | | \$ - |
| | | | | | | | Federal Totals: | \$ 239,507 |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| State | Match | 2021 | | | | | \$ 27,413 | \$ 27,413 |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ 27,413 |
| Local Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | | \$ - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 266,920 | \$ 266,920 |
| Year Of Expenditure (YOE): | | | | | | | | \$ 266,920 |

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Add new TSMO awarded project tot eh mTIP..

Amendment Summary:

- The formal amendment adds the new Metro TSMO awarded project tot he 2021-24 MTIP. The funding award originates from the Metro 2019-21 TSMO funding call. Several ITS related projects were awarded fund to provide upgrades to the signal controllers. This is one of four similar projects involving the purchase of Advanced Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing at multiple locations throughout Region 1.
- > Will Performance Measurements Apply: Yes, ITS & Safety

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety - Traffic control devices and operating assistance other than signalization projects.
- > UPWP amendment: No
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 - Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: Yes
- > Metro Model: Yes - Motor Vehicle Network
- > Model category and type: Throughways and Major Arterials
- > TCM project: No
- > Located on the CMP: Yes



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
CANCEL PROJECT
 Cancel project and delay and re-add
 to 2024-27 STIP

| | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------------------------|------------------------|
| Lead Agency: ODOT | | Project Type: O&M | ODOT Key: 21800 |
| Project Name: I-84: NE Martin Luther King Jr Blvd - I-205 | 21 | ODOT Type: Preserve | MTIP ID: 71200 |
| | | Performance Meas: No | Status: 2 |
| | | Capacity Enhancing: No | Comp Date: N/A |
| | | Conformity Exempt: Yes | RTP ID: 12094 |
| | | On State Hwy Sys: I-84 | RFFA ID: N/A |
| | | Mile Post Begin: 0.40 | RFFA Cycle: N/A |
| | | Mile Post End: 7.12 | UPWP: No |
| | | Length: 6.72 | UPWP Cycle: N/A |
| | | Flex Transfer to FTA: No | Transfer Code: N/A |
| | | 1st Year Program'd: 2021 | Past Amend: 0 |
| | | Years Active: 1 | OTC Approval: Yes |
| | | STIP Amend #: 21-24-0764 | |
| <div style="background-color: #a52a2a; color: white; padding: 10px; font-size: 24px; font-weight: bold; display: inline-block;"> CANCELED PROJECT </div> | | | |
| Detailed Description: Design for a future pavement resurfacing project to repair ruts and surface wear. | | | |
| STIP Description: Design for a future pavement resurfacing project to repair ruts and surface wear. | | | |

Last Amendment of Modification: None. This is the first amendment to the project.

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (ITS) | Total |
|-----------------------------------|------------------|-----------------|----------|-------------------------|--------------|----------------|---------------------------|-------------------------|
| Federal Funds | | | | | | | | |
| NHPP | 2002 | 2021 | | \$ 922,200 | | | - | \$ - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | Federal Totals: \$ | - |
| Federal Obligation Amount: | | | | | | Federal Aid ID | | |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| State | Match | 2021 | | \$ 77,800 | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | State Total: \$ | - |
| Local Funds | | | | | | | | |
| | | | | | | | \$ | - |
| | | | | | | | \$ | - |
| | | | | | | | Local Total \$ | - |
| Phase Totals Before Amend: | | | \$ - | \$ 1,000,000 | \$ - | \$ - | \$ - | \$ 1,000,000 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Year Of Expenditure (YOE): | | | | | | | | \$ - |

CANCELED PROJECT

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > ACTION: Cancel project from 2021-24 MTIP

Amendment Summary:

The formal amendment cancels Key 21800, ODOT's I-84: NE Martin Luther King Jr Blvd - I-205 rehab project. In the 2021-2024 STIP, this project was originally awarded \$1,000,000 Fix-it Interstate Maintenance (IM) funds which includes the state match requirement. The intent of the project was to design for a future pavement resurfacing project to repair ruts and surface wear. The reason for cancellation was due to the fact that the pavement along this segment of Interstate-84 is in better condition than expected. The IM Program manager recommends optimizing the current paving investment and postponing this project to the next STIP update

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12094 - Highway Pavement Maintenance
- > RTP Description: Pavement rehabilitation/repair projects includes overlays, slurry seals, full pavement replacement, and other minor roadway improvements (curb and gutters, adding/widening shoulders) that do not add motor vehicle capacity.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety - Pavement resurfacing and/or rehabilitation.
- > UPWP amendment: No
- > RTP Goals: Goal 10 - Fiscal Stewardship
- > Goal Objective: Objective 10.1 - Infrastructure Condition
- > Goal Description: Plan, build and maintain regional transportation assets to maximize their useful life, minimize project construction and maintenance costs and eliminate maintenance backlogs

Fund Codes:

- > NHPP = Federal funds appropriated to ODOT and then applied to eligible state highway system projects .
- > State = General state funds provided by the lead agency as part of the required match.

Other

- > On NHS: Yes. The project facility is identified as part of the Eisenhower Interstate System
- > Metro Model: The project does not require air quality modeling, but is located on a Metro modeled facility
- > Model category and type: "Throughways" in the Motor Vehicle network,
- > TCM project: No
- > Located on the CMP: Yes



Metro
20121-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
CANCEL PROJECT
 CMAQ funds shifted to Max Red Line Extension

| | | | |
|--------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------|---------------------------------|
| Lead Agency: TriMet | | Project Type: Transit | ODOT Key: 22188 |
| Project Name: Electric Bus Purchase (Metro Fund Exchange) | 22 | ODOT Type: Transit | MTIP ID: 71217 |
| | | Performance Meas: Yes | Status: 0 |
| Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). | | Capacity Enhancing: No | Comp Date: N/A |
| | | Conformity Exempt: Yes | RTP ID: 11335 |
| | | On State Hwy Sys: No | RFFA ID: N/A |
| | | Mile Post Begin: N/A | RFFA Cycle: N/A |
| | | Mile Post End: N/A | UPWP: No |
| | | Length: N/A | UPWP Cycle: N/A |
| | | Flex Transfer to FTA: Yes | Transfer Code: 5307 |
| | | 1st Year Program'd: 2023 | Past Amend: 0 |
| | | Years Active: 0 | OTC Approval: No |
| | | STIP Amend #: TBD | MTIP Amnd #: JN21-11-JUN |

CANCELED PROJECT

Detailed Description: None

STIP Description: Purchase alternative fuel transit buses to enhance the existing fleet. Region

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering | Right of Way | Construction | Other (Transit) | Total |
|-------------------------------------|------------------|-----------------|----------|-------------------------|--------------|--------------|-------------------------|-------------------------|
| Federal Funds | | | | | | | | |
| GMAQ | Z400 | 2023 | | | | | \$ 4,946,372 | \$ - |
| | | | | | | | \$ | - |
| | | | | | | | Federal Totals: | \$ - |
| Federal Fund Obligations \$: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| EA End Date: | | | | | | | | |
| Known Expenditures: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | - |
| | | | | | | | | - |
| | | | | | | | | - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Local | Match | 2023 | | | | | \$ 566,134 | \$ - |
| | | | | | | | \$ | - |
| | | | | | | | Local Total | \$ - |
| Phase Totals Before Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ 5,512,506 | \$ 5,512,506 |
| Phase Totals After Amend: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Year Of Expenditure (YOE): | | | | | | | | \$ - |

CANCELED PROJECT

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Cancel procurement and shift funds to TriMet MAX Red Line Extension project.

Amendment Summary:

- The formal amendment cancels the project from the MTIP and shifts the funds over to the TriMet MAX Red Line Extension project in Key 20849
- > Will Performance Measurements Apply: Yes, ITS & Safety

RTP References:

- > RTP ID: 11335 - Operating Capital: Equipment and Facilities Phase 1
- > RTP Description: Additional maintenance costs to support existing bus system including ongoing bus purchases as needed to maintain and update fleet.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Mas Transit - Purchase of new buses and rail cars to replace existing vehicles or for minor expansions of the fleet 1.
- > UPWP amendment: No
- > RTP Goals: Goal 7
- > Goal Objective: Objective 7.3 - Clean Air
- > Goal Description: Reduce transportation-related air pollutants, including and air toxics emissions.

Fund Codes:

- > CMAQ = Federal Congestion Mitigation Air Quality (CMAQ) improvement funds. The CMAQ program focuses on air quality improvements and funds eligible project that meet the criteria .
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Metro Model: No - replacement vehicles
- > Model category and type: N/A
- > TCM project: No
- > Located on the CMP: No



Metro
2018-21 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
COST INCREASE
 Minor Cost Increase

| | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------------|---------|--|-------------------|-------------------|--|
| Lead Agency: TriMet | | Project Type: | Transit | | ODOT Key: | 20849 | |
| Project Name: MAX Red Line Extension & Reliability Improvements | | ODOT Type | Transit | | MTIP ID: | 71230 | |
| | | Performance Meas: | Yes | | Status: | 6 | |
| Project Status: 6 = Pre-construction activities (pre-bid, construction management oversight, etc.). | | Capacity Enhancing: | Yes | | Comp Date: | 12/31/2023 | |
| | | Conformity Exempt: | No | | RTP ID: | 10922 | |
| Short Description: Extend MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport, double track single track sections near Gateway/NE 99th Ave and at PDX Airport with reconfigured station, plus construct new light rail bridge and Red Line station at Gateway. | | On State Hwy Sys: | No | | RFFA ID: | N/A | |
| | | Mile Post Begin: | N/A | | RFFA Cycle: | N/A | |
| | | Mile Post End: | N/A | | UPWP: | No | |
| | | Length: | N/A | | UPWP Cycle: | N/A | |
| | | Flex Transfer to FTA | Yes | | FTA Code | 5307 | |
| | | 1st Year Program'd: | 2018 | | Past Amend: | 1 | |
| | | Years Active: | 4 | | OTC Approval: | No | |
| | | STIP Amend #: | TBD | | MTIP Amnd #: | JN21-11-JUN | |

Detailed Description:
 In Beaverton and the Hillsboro area, extend the MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport station resulting in the Red Line accessing existing 10 Blue Line station stops including Beaverton Central, Milikan Way, Beaverton Creek, Merlo, SW 158th, El Monica/SW170th, Willow Creek, SW 185th Transit Center, Quatama, Orenco, Hawthorn Farm and Rail Complex/Hillsboro Airport. At Gateway and at PDX Airport, double track single track sections near Gateway/NE 99th Ave and at PDX Airport. This includes track, switch, and signalization work; construction of an operator break facility at the Fair Complex/Hillsboro Airport Station and construction of a new light rail bridge and Red Line station at Gateway along with a new ped/bike path to connect the existing and new platform, stations. This also includes new Light Rail Vehicles.

STIP Description: Extend MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport, double track sections near Gateway/NE 99th Ave & PDX Airport, and construct new light rail bridge and Red Line station at Gateway along with a new pedestrian/bicycle path. This extension will increase capacity and improve the reliability of the entire MAX light rail system

Past Amendments: Formal, August 2020 -AG21-01-AUG, ADD NEW PROJECT: The amendment adds full programming for the MAX Red Line Extension project to the 2021-24 MTIP.

PROJECT FUNDING DETAILS

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (Transit =Final Engineering) | Right of Way | Construction | Other (Transit) | Total |
|----------------------------------|------------------|-----------------|----------|---------------------------------------------------------|-------------------------|---------------------------|----------------------------|-----------------------|
| Federal Funds | | | | | | | | |
| STBG-U | Z230 | 2021 | | \$ 4,000,000 | | | | \$ 4,000,000 |
| 5309-SS | FF30 | 2021 | | | \$ 950,000 | | | \$ - |
| 5309 SS | FF30 | 2021 | | | \$ 2,608,462 | | | \$ 2,608,462 |
| FTA-5309-SS | FF30 | 2021 | | | | \$ 99,234,564 | | \$ - |
| FTA 5309 SS | FF30 | 2021 | | | | \$ 97,391,538 | | \$ 97,391,538 |
| | | | | | | \$ 4,946,372 | | \$ 4,946,372 |
| | | | | | | | Federal Totals: | \$ 108,946,372 |
| Federal Fund Obligations: | | | | | | | | Federal Aid ID |
| EA Number: | | | | | | | | |
| Initial Obligation Date: | | | | | | | | |
| State Funds | | | | | | | | |
| | | | | | | | | \$ - |
| | | | | | | | State Total: | \$ - |
| Local Funds | | | | | | | | |
| Other | OTH0 | 2018 | | | | | \$ 10,499,072 | \$ 10,499,072 |
| Local | Match | 2021 | | \$ 457,818 | | | | \$ 457,818 |
| Other | OTH0 | 2021 | | \$ 13,726,182 | | | | \$ 13,726,182 |
| Local | Match | 2021 | | - | \$ 950,000 | | | \$ - |
| Local | Match | 2021 | | | \$ 2,608,462 | | | \$ 2,608,462 |
| Local | Match | 2021 | | | | \$ 87,050,566 | | \$ - |
| Local | Match | 2021 | | | | \$ 87,840,421 | | \$ 87,840,421 |
| Local (CMAQ) | Match | 2021 | | | | \$ 566,134 | | \$ 566,134 |
| | | | | | | | Local Total | \$ 115,698,089 |
| Phase Totals Before Amend: | | | \$ - | \$ 18,184,000 | \$ 1,900,000 | \$ 186,285,130 | \$ 10,499,072 | \$ 216,868,202 |
| Phase Totals After Amend: | | | | \$ 18,184,000 | \$ 5,216,924 | \$ 190,744,465 | \$ 10,499,072 | \$ 224,644,461 |
| | | | | | | | Year Of Expenditure (YOE): | \$ 224,644,461 |

Programming Notes:

- (1) The Other phase with \$10,499,072 represents prior obligated project development expenditures
- (2) The total 5309 Small Starts grant totals \$100,000,000. The 5309 is reduced in the Construction phase to increase the ROW phase.
- (3) The total local matching funds towards the 5309 FTA grant include the following: ROW of \$2,608,462 + PE Local Other funds of \$13,726,182 + Project Development funds of \$10,499,072 + Construction phase match to 5309 of \$87,840,421 for a matching fund total of \$114,674,137. The STBG and CMAQ local matches are separate. Under Pre-Award Authority, local funds in PE and the Other phase for project development may count towards the 50% local match requirement.
- (4) The cost increase equals \$7,776,259 which equals a 3.5% increase to the project

Notes and Summary of Changes:

Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment adds the new CMAQ funds (and match) from Key 22188. The Max Red Line Extension project has been evaluated as a suitable substitute for the original Electric Bus purchase project in Key 22188. The project phase costs have been updated per TriMet's guidance as well. Including the CMAQ and Other phase project development local funding per FTA's direction increases the total project cost to \$224,644,461. The phase cost adjustments also includes a ROW phase cost increase as well. Without the project development costs, the project's total implementation costs are \$214,145,387.

> Will Performance Measurements Apply: Yes

RTP References:

> RTP ID: 10922 - HCT: MAX Red Line Improvements Project - Capital Construction

> RTP Description: Capital construction to enable extension of Red Line service to the Hillsboro Airport/Fair Complex Station and improve reliability of the entire MAX light rail system. Project includes double-tracking and a new inbound Red Line station at Gateway Transit Center, double tracking at Portland Airport, upgrades to signals and switches along the alignment, and purchase of new light rail vehicles needed to operate the extension and needed storage capacity at Ruby Junction to house the new vehicles.

> Exemption Status: Project is not exempt. The Red Line extension is a capacity enhancing project and does not qualify as an exempt project per 40 CFR 93.126, Table 2 - Mass Transit.

> Capacity Enhancing/RTP Consistency Review:

> 1. The new MAX Red Line Extension is identified in the Transit Modeling Network correctly up to the Fair Complex/Hillsboro Airport station.

> 2. Applicable upgrades to the Red Line at Gateway and at PDX airport also are included in the transit model.

> No action to the UPWP is required.

Fund Codes:

> 5309 = Federal Transit Administration discretionary Section 5309 Small Starts funds.

> STBG-U = Surface Transportation Block Grant - Urban funds allocated to Metro

CMAQ = Congestion Mitigation Air Quality (CMAQ) improvement funds which support projects that provide measurable air quality improvements

> Local = General local funds provided by the lead agency as part of the required match to the project

> Other = Local funds provided by the lead agency or another contributing agency that covers required phase costs above the required minimum match.

Other

> On NHS: No

> Metro Model: Yes, Transit Model

> Model category and type: Light Rail

> TCM project: No



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: May 27, 2021
 To: TPAC and Interested Parties
 From: Ken Lobeck, Funding Programs Lead
 Subject: June 2021 MTIP Formal Amendment & Resolution 21-5182 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO COMPLETE THE REPROGRAMMING OF UNIFIED PLANNING WORK PROGRAM (UPWP) ANNUAL PROGRAM ESTIMATES IMPACTING METRO, PLUS AMEND, ADD, OR CANCEL SEVERAL PROJECTS IMPACTING ODOT AND TRIMET TO ADDRESS THEIR NEXT FEDERAL APPROVAL STEP (JN21-11-JUN)

BACKGROUND

What This Is:

The June 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle which is contained in Resolution 21-5182 and being processed under MTIP Amendment JN21-11-JUN. The bundle contains a total of 23 projects.

What is the requested action?

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 21-5182 consisting of twenty-three projects which will complete UPWP project grouping buckets reprogramming for Metro and complete required adjustments, additions, or cancelations to projects impacting ODOT and TriMet enabling them to obtain their next federal approval step.

| Proposed June 2021 Formal Amendment Bundle | | | | | |
|--------------------------------------------|-----------|-------------|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Amendment Type: Formal/Full | | | | | |
| Amendment #: JN21-11-JUN | | | | | |
| Total Number of Projects: 23 | | | | | |
| ODOT Key # | MTIP ID # | Lead Agency | Project Name | Project Description | Description of Changes |
| UPWP Project Reprogramming Actions | | | | | |
| Project #1 Key # 22160 | 71109 | Metro | Safe Routes to Schools Program (FFY 2022) | Promotes through planning, funding and outreach activities the ability for youth to safely, affordably and efficiently access school by walking, biking and transit. (FY 2022 allocation year) | REPROGRAM PROJECT: Push out the UPWP SRTS project to FY 2025. When the UPWP is approved requiring the funds, they will be advanced to the applicable obligation year. |

| ODOT Key # | MTIP ID # | Lead Agency | Project Name | Project Description | Description of Changes |
|-------------------------|-----------|-------------|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #2 Key 22161 | 71114 | Metro | Safe Routes to Schools Program (FFY 2023) | Promotes through planning, funding and outreach activities the ability for youth to safely, affordably and efficiently access school by walking, biking and transit. (FY 2023 allocation year) | REPROGRAM PROJECT: Push out the UPWP SRTS project to FFY 2025. When the UPWP is approved requiring the funds, they will be advanced to the applicable obligation year |
| Project #3 Key 22162 | 71110 | Metro | Safe Routes to Schools Program (FFY 2024) | Promotes through planning, funding and outreach activities the ability for youth to safely, affordably and efficiently access school by walking, biking and transit. (FY 2024 allocation year) | REPROGRAM PROJECT: Push out the UPWP SRTS project to FFY 2025. When the UPWP is approved requiring the funds, they will be advanced to the applicable obligation year |
| Project #4 Key 22172 | 71105 | Metro | Statewide Travel Survey | Contribution to statewide travel survey to inform travel forecasting models. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #5 Key 22163 | 71102 | Metro | Transit Oriented Development (TOD) program (FFY 2022) | Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #6 Key 22164 | 71103 | Metro | Transit Oriented Development (TOD) program (FFY 2023) | Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #7 Key 22165 | 71104 | Metro | Transit Oriented Development (TOD) program (FFY 2024) | Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #8 Key 22169 | 71124 | Metro | TSMO Administration (FFY 2022) | Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |

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| Project #9 Key 22170 | 71125 | Metro | TSMO Administration (FFY 2023) | Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #10 Key 22171 | 71126 | Metro | TSMO Administration (FFY 2024) | Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #11 Key 22166 | 71115 | Metro | TSMO Program Sub-allocation Funds (FFY 2022) | The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effective. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #12 Key 22167 | 71116 | Metro | TSMO Program Sub-allocation Funds (FFY 2023) | The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effective. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #13 Key 22168 | 71117 | Metro | TSMO Program Sub-allocation Funds (FFY 2024) | The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects that use technology and operations techniques to make existing transportation facilities operate more effective. | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program. |
| Project #14 Key 20886 | 70875 | Metro | Transportation System Mgmt Operations/ITS (2021) | Provide strategic and collaborative program management including coordination of activities for TransPort TSMO | REPROGRAM PROJECT: Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program |
| End UPWP Related Project Amendments | | | | | |
| Project #15 Key 22431 New Project | TBD | ODOT | OR141/OR217 Curb Ramps | At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps | ADD NEW PROJECT: The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements. |

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|---------------------------------------|-------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #16 Key 22432 | TBD | ODOT | US30BY Curb Ramps | At various location on US30 Bypass in the NE Portland area, construct ADA compliant curbs and ramps. | ADD NEW PROJECT: The formal amendment adds the new ADA safety improvement project to the MTIP. OTC approval during January authorized the funds in support of required ADA improvements. |
| Project #17 Key 21616 | 71170 | ODOT | OR99W: OR217 -SW Sunset Blvd & US30B: Kerby-162nd Ave OR99W:N Schmeer Rd-SW Meinecke Pkwy & US30B: Kerby-165th Ave | Upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. | LIMITS CORRECTION: The formal amendment updates the project name based on revised project limits MPs to match the approved charter when CMR-00 was processed. The limits are adjusted significantly, but the scope remains unchanged. |
| Project #18 Key 20884 | 70875 | Metro | Transportation System Mgmt Operations/ITS (2019) | Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee | SPLIT/COMBINE PROJECT: The formal amendment commits the remaining funds in this TSMO PGB to ODOT's new ATC project (included in this amendment bundle). As a result, Key 20884 is now zero programmed |
| Project #19 Key 20885 | 70875 | Metro | Transportation System Mgmt Operations/ITS (2020) | Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee | SPLIT/COMBINE PROJECT: The formal amendment splits \$233,747 of STBG and required match to ODOT's new ATC project (included in this amendment bundle).. The programming years are being pushed-out to FY 2025 as well to avoid conflicts with the Obligation Targets program. |
| Project #20 Key TBD New Project | TBD | ODOT | Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy | Purchase Advanced Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing at various locations in Region 1 | ADD NEW PROJECT: The formal amendment adds the new Metro TSMO awarded project to the 2021-24 MTIP. The funding award originates from the Metro 2019-21 TSMO funding call. Specific STBG funding is being split off from Keys 20884 and 20885 |
| Project #21 Key 21800 | 71200 | ODOT | I-84: NE Martin Luther King Jr Blvd - I-205 | Design for a future pavement resurfacing project to repair ruts and surface wear. | CANCEL PROJECT: The amendment cancels the project. The latest review indicated the surface is in better condition than anticipated allowing the project to be delayed until the next STIP cycle. |
| Project #22 Key 22188 | 71217 | TriMet | Electric Bus Purchase (Metro Fund Exchange) | Electric Bus Purchase (Metro Fund Exchange) | CANCEL PROJECT: The formal amendment cancels the project from the MTIP and shifts the funds over to the TriMet MAX Red Line Extension project in Key 20849 |

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|--------------------------|-------|--------|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project #23 Key 20849 | 71230 | TriMet | MAX Red Line Extension & Reliability Improvements | Extend MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport, double track single track sections near Gateway/NE 99th Ave and at PDX Airport with reconfigured station, plus construct new light rail bridge and Red Line station at Gateway. | COST INCREASE: The CMAQ funds from Key 22188 are added to the project. The project phase costs have been updated as well. Overall, the cost increase is minor at only 3.5% |
|--------------------------|-------|--------|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

AMENDMENT BUNDLE SUMMARY:

The June 2021 Formal MTIP Amendment bundle continues the UPWP pre-positioned project grouping buckets (PGB) reprogramming out to FFY 2025 to avoid future conflicts the annual Obligation Targets program. UPWP PGBs reprogrammed as part of the June Formal Amendment bundle include:

- Safe Routes to Schools (SRTS) PGBs (FFY 2022 through FY 2024) (3 projects)
- FFY 2022 State Travel Survey (1 project)
- Transit Oriented Development (TOD) program (FFY 2022 through FFY 2024) (3 projects)
- TSMO Administration (FFY 2022 through FFY 2024) (3 projects)
- TSMO Program Sub-allocation Funds (FFY 2022 through FFY 2025) (3 projects)
- Transportation System Mgmt Operations/ITS (FFY 2021) (older allocation -1 project)

Total number of UPWP pre-positioned PGBs being re-programmed: 14

The remaining projects in the bundle are the standard changes required for the end of federal year phase obligations or federal approval steps. Five projects belong to ODOT and included amendments, adding new projects, or canceling projects. Two projects are Metro Transportation System Management and Operations (TSMO) PGBs supporting the new ODOT Advance Traffic Control Upgrade and Deployment project.

The final two amended projects involve two TriMet projects. The first involves canceling the planned Electric Bus purchase. The cancelation results from infeasible procurement timing during FY 2023 to purchase the buses. Because the project funding is federal CMAQ and has an obligation shelf-life lapse of the end of FFY 2023, Metro worked with TriMet for a suitable substitute that FHWA would approve. A review and submission to FHWA of the TriMet MAX Red Line Extension project in Key 20849 proved to be a satisfactory substitute for the Bus Purchase. As part of the amendment bundle, The CMAQ funds are being removed from the Bus Purchase project in Key 22188 and re-programmed to the MAX Red Line Extension project in the Construction phase for a planned obligation before the end of FFY 2021.

The total number of projects within the June 2021 Formal MTIP Amendment is 23.

A detailed summary of the UPWP projects being reprogrammed out to FFY 2025 are listed below. They are grouped together based on their purpose and funding categories.

| | | | | |
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| Projects 1-3: | | Safe Routes to Schools Program (FFY 2022) | | UPWP Related |
| | | Safe Routes to Schools Program (FFY 2023) | | |
| | | Safe Routes to Schools Program (FFY 2024) | | |
| Lead Agency: | Metro | | | |
| ODOT Key Number: | 22160 | | MTIP ID Number: | 71109 |
| | 22161 | | | 71114 |
| | 22162 | | | 71110 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> Yes • <u>Proposed improvements:</u> The project grouping bucket (PGB) is an ongoing Metro UPWP planning effort to achieve a region where all kids and youth are able to safely, affordably, and efficiently access school and their community by walking, biking, and transit. The Metro SRTS Program promotes collaboration between SRTS practitioners, provides technical assistance to support new & existing programs, and supports the growth of sustainable funding for SRTS. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Reprogram FFY 2022 UPWP allocation out to FY 2025 to avoid conflicts with the Obligation Targets program • <u>Funding:</u> The funding for the SRTS program is Surface Transportation Block Grant (STBG) funds allocated to Metro • <u>FTA Conversion Code:</u> 5307. The funding normally will be flex-transferred to FTA to obligate and expend the funds for SRTS program • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: MPO Region wide ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 0 = No activity (for these program funds) • <u>Air Conformity/Capacity Status:</u> The projects are not defined at this time. However, as planning projects, they will be considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and are exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning activities conducted pursuant to titles 23 and 49 U.S.C. • <u>Regional Significance Status:</u> N/A | | | |

| | <ul style="list-style-type: none"> • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021. | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------------------|---------------------|--------------|-------|-------|-------|------|------|-----------|----------|-----------|-------|------|------|-----------|----------|-----------|-------|------|------|-----------|----------|-----------|
| What is changing? | <p>AMENDMENT ACTION: REPROGRAM FUNDS</p> <p>The formal amendment reprograms the project tout to FFY 2025 to avoid conflicts with the annual Obligation Targets. Metro is completing this for the UPWP STBG funded prepositioned project grouping buckets to ensure fund lapses do not occur.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Additional Details: | <p>A formal MTIP amendment will be required to advance the approved funds to their specific year of obligation once they are identified in the applicable annual UPWP.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Why a Formal amendment is required? | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, moving funds from a fiscally constrained year to unconstrained year requires a formal amendment.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Programmed Amount: | <p>Programming remains unchanged for the identified projects</p> <table border="1"> <thead> <tr> <th>Key</th> <th>Prior Programmed Year</th> <th>New Programmed year</th> <th>Federal STBG</th> <th>Match</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>22160</td> <td>2022</td> <td>2025</td> <td>\$530,450</td> <td>\$60,712</td> <td>\$591,162</td> </tr> <tr> <td>22161</td> <td>2023</td> <td>2025</td> <td>\$546,364</td> <td>\$62,534</td> <td>\$608,898</td> </tr> <tr> <td>22162</td> <td>2024</td> <td>2025</td> <td>\$562,754</td> <td>\$64,410</td> <td>\$627,164</td> </tr> </tbody> </table> | Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | 22160 | 2022 | 2025 | \$530,450 | \$60,712 | \$591,162 | 22161 | 2023 | 2025 | \$546,364 | \$62,534 | \$608,898 | 22162 | 2024 | 2025 | \$562,754 | \$64,410 | \$627,164 |
| Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | | | | | | | | | | | | | | | | | | | | |
| 22160 | 2022 | 2025 | \$530,450 | \$60,712 | \$591,162 | | | | | | | | | | | | | | | | | | | | |
| 22161 | 2023 | 2025 | \$546,364 | \$62,534 | \$608,898 | | | | | | | | | | | | | | | | | | | | |
| 22162 | 2024 | 2025 | \$562,754 | \$64,410 | \$627,164 | | | | | | | | | | | | | | | | | | | | |
| Added Notes: | | | | | | | | | | | | | | | | | | | | | | | | | |

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| Project 4 | Statewide Travel Survey | UPWP Related |
| Lead Agency: | Metro | |
| ODOT Key Number: | 22172 | MTIP ID Number: 71105 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> Yes • <u>Proposed improvements:</u> Regional planning activity that provides a Contribution to statewide travel survey to inform travel forecasting models. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Reprogram funding to FFY 2025 • <u>Funding:</u> The funding is federal Step1 Regional Flexible Funding Allocation (RFFA) Surface Transportation Block Grant funds (STBG). • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: MPO Region wide | |

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| | <ul style="list-style-type: none"> ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A ● <u>Current Status Code:</u> 0 = No activity (for these program funds) ● <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning activities conducted pursuant to titles 23 and 49 U.S.C. ● <u>Regional Significance Status:</u> N/A ● <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021. |
| What is changing? | <p><u>AMENDMENT ACTION: REPROGRAM FUNDS</u></p> <p>The formal amendment reprograms the project from its current allocation year to the MTIP’s unconstrained year of FFY 2025. The reprogramming purpose to avoid possible conflicts with the annual Obligation Targets program requirements.</p> |
| Additional Details: | A formal MTIP amendment will be required to advance the approved funds to their specific year of obligation once they are identified in the applicable annual UPWP. |
| Why a Formal amendment is required? | Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, moving funds from a fiscally constrained year to unconstrained year requires a formal amendment. |
| Total Programmed Amount: | The project programming remains unchanged at \$390,059 |
| Added Notes: | |

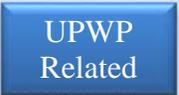
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| Projects 5-7: | Transit Oriented Development (TOD) program (FFY 2022) Transit Oriented Development (TOD) program (FFY 2023) Transit Oriented Development (TOD) program (FFY 2024) | |  |
| Lead Agency: | Metro | | |
| ODOT Key Number: | 22163 22164 22165 | MTIP ID Number: | 71102 71103 71104 |
| Projects Description: | Project Snapshot: <ul style="list-style-type: none"> ● <u>Metro UPWP Project:</u> Yes ● <u>Proposed improvements:</u> | | |

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| | <p>Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FFY 2022 -24 allocation years)</p> <ul style="list-style-type: none"> • <u>Source:</u> Existing projects. • <u>Amendment Action:</u> Reprogram to FY 2025 to avoid conflicts with the Obligation Targets program • <u>Funding:</u> The funding is federal Regional Flexible Fund Allocation (RFFA) Step 1 “Surface Transportation Block Grant (STBG) funds. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Regional ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 0 = No activity (for these program funds) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning and Technical Studies • <u>Regional Significance Status:</u> N/A • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: REPROGRAM FUNDS</u></p> <p>The formal amendment reprograms the three UPWP TOD project grouping buckets out to FFY 2025. The action will eliminate possible conflicts with the development and execution of the annual Obligation Targets program. As each new UPWP is developed and approved, the required funds from each STBG UPWP bucket will be then advanced and combined into the designated project key for the Master Agreement list of UPWP projects.</p> |
| <p>Additional Details:</p> | |
| <p>Why a Formal amendment is required?</p> | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, moving a project to anon-constrained year in the MTIP requires a formal/full amendment complete.</p> |

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| Total Programmed Amount: | Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total |
| | 22163 | 2022 | 2025 | \$3,495,507 | \$400,076 | \$3,895,583 |
| | 22164 | 2023 | 2025 | \$3,600,373 | \$412,079 | \$4,012,452 |
| | 22165 | 2024 | 2025 | \$3,708,384 | \$424,441 | \$4,132,825 |
| Added Notes: | | | | | | |

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| Projects 8-10 | TSMO Administration (FFY 2022) TSMO Administration (FFY 2023) TSMO Administration (FFY 2024) | | UPWP Related |
| Lead Agency: | Metro | | |
| ODOT Key Number: | 22169 | | 71124 |
| | 22170 | MTIP ID Number: | 71125 |
| | 22171 | | 71126 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> Yes • <u>Proposed improvements:</u> The Regional Travel Options (RTO) program implements strategies to help diversify trip choices, reduce pollution and improve mobility. Source: Existing project. • <u>Amendment Action:</u> Reprogram funds out to FY 2025 to avoid conflicts with the Obligation Targets program • <u>Funding:</u> The funding is federal Surface Transportation Block Grant (STBG) funds. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: MPO Region wide ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 0 = No activity (for these program funds) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning activities conducted pursuant to titles 23 and 49 U.S.C. • <u>Regional Significance Status:</u> N/A • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JNP21-11-JUN | | |

| | <ul style="list-style-type: none"> ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021 | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------------------|---------------------|--------------|-------|-------|-------|------|------|-----------|----------|-----------|-------|------|------|-----------|----------|-----------|-------|------|------|-----------|----------|-----------|
| What is changing? | <p><u>AMENDMENT ACTION: REPROGRAM FUNDS</u></p> <p>The formal amendment completes reprograms the TSMO admin funds out to FY 2025 to avoid conflicts with the Obligation Targets program.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Additional Details: | <p>The pre-positioned PGBs contain funding supporting TSMO program administrative needs. These buckets are separate from the TSMO buckets (Keys 22166, 22167, and 22168) that support award TSMO projects.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Why a Formal amendment is required? | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, shifting committed funds from constrained years into unconstrained years requires a formal/full amendment complete.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Programmed Amount: | <table border="1"> <thead> <tr> <th>Key</th> <th>Prior Programmed Year</th> <th>New Programmed year</th> <th>Federal STBG</th> <th>Match</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>22169</td> <td>2022</td> <td>2025</td> <td>\$188,707</td> <td>\$21,598</td> <td>\$210,305</td> </tr> <tr> <td>22170</td> <td>2023</td> <td>2025</td> <td>\$194,369</td> <td>\$22,246</td> <td>\$216,615</td> </tr> <tr> <td>22171</td> <td>2024</td> <td>2025</td> <td>\$200,200</td> <td>\$22,914</td> <td>\$223,114</td> </tr> </tbody> </table> | Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | 22169 | 2022 | 2025 | \$188,707 | \$21,598 | \$210,305 | 22170 | 2023 | 2025 | \$194,369 | \$22,246 | \$216,615 | 22171 | 2024 | 2025 | \$200,200 | \$22,914 | \$223,114 |
| Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | | | | | | | | | | | | | | | | | | | | |
| 22169 | 2022 | 2025 | \$188,707 | \$21,598 | \$210,305 | | | | | | | | | | | | | | | | | | | | |
| 22170 | 2023 | 2025 | \$194,369 | \$22,246 | \$216,615 | | | | | | | | | | | | | | | | | | | | |
| 22171 | 2024 | 2025 | \$200,200 | \$22,914 | \$223,114 | | | | | | | | | | | | | | | | | | | | |
| Added Notes: | | | | | | | | | | | | | | | | | | | | | | | | | |

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| Projects 11-13 | TSMO Program Sub-allocation Funds (FFY 2022) TSMO Program Sub-allocation Funds (FFY 2023) TSMO Program Sub-allocation Funds (FFY 2024) | |  |
| Lead Agency: | Metro | | |
| ODOT Key Number: | 22166 22167 22168 | MTIP ID Number: | 71115 71116 71117 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project: Yes</u> • <u>Proposed improvements:</u> Keys 22166, 22167, and 22168 are Transportation System Management and Operations (TSMO) project grouping buckets (PGBs) The Metro (TSMO) program completes a periodic discretionary funding call and awards projects that support Intelligent Transportation System (ITS) improvements to the transportation network. Estimated revenues to be committed to specific projects are programmed in the MTIP and pre-position in their estimated allocation year. When funds are committed to specific projects, they are split off the PGB and programmed to the project. <p>Note: Keys 22166, 22167, and 22168 contains funds awarded to specific TSMO projects. The TSMO administrative program buckets in Keys 2269, 22170, and 22171 support TSMO administrative functions such as staff salaries and are part of the UPWP program.</p> <ul style="list-style-type: none"> • Source: Existing project. | | |

| | <ul style="list-style-type: none"> • <u>Amendment Action:</u> Reprogram funds out to FY 2025 to avoid conflicts with the Obligation Targets program • <u>Funding:</u> The funding is federal Surface Transportation Block Grant (STBG) funds. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: MPO Region wide ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 0 = No activity (for these program funds) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Traffic control devices and operating assistance other than signalization projects. • <u>Regional Significance Status:</u> N/A • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JNP21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021 | | | | | | | | | | | | | | | | | | | | | | | | |
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| What is changing? | <p><u>AMENDMENT ACTION: REPROGRAM FUNDS</u></p> <p>The formal amendment completes reprograms the TSMO project out to FY 2025 to avoid conflicts with the Obligation Targets program.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| Additional Details: | | | | | | | | | | | | | | | | | | | | | | | | | |
| Why a Formal amendment is required? | Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, shifting committed funds from constrained years into unconstrained years requires a formal/full amendment complete. | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Programmed Amount: | <table border="1"> <thead> <tr> <th>Key</th> <th>Prior Programmed Year</th> <th>New Programmed year</th> <th>Federal STBG</th> <th>Match</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>22166</td> <td>2022</td> <td>2025</td> <td>\$1,667,158</td> <td>\$190,814</td> <td>\$1,857,972</td> </tr> <tr> <td>22167</td> <td>2023</td> <td>2025</td> <td>\$ 1,717,173</td> <td>\$196,538</td> <td>\$1,913,711</td> </tr> <tr> <td>22168</td> <td>2024</td> <td>2025</td> <td>\$1,768,688</td> <td>\$202,432</td> <td>\$1,971,122</td> </tr> </tbody> </table> | Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | 22166 | 2022 | 2025 | \$1,667,158 | \$190,814 | \$1,857,972 | 22167 | 2023 | 2025 | \$ 1,717,173 | \$196,538 | \$1,913,711 | 22168 | 2024 | 2025 | \$1,768,688 | \$202,432 | \$1,971,122 |
| Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total | | | | | | | | | | | | | | | | | | | | |
| 22166 | 2022 | 2025 | \$1,667,158 | \$190,814 | \$1,857,972 | | | | | | | | | | | | | | | | | | | | |
| 22167 | 2023 | 2025 | \$ 1,717,173 | \$196,538 | \$1,913,711 | | | | | | | | | | | | | | | | | | | | |
| 22168 | 2024 | 2025 | \$1,768,688 | \$202,432 | \$1,971,122 | | | | | | | | | | | | | | | | | | | | |
| Added Notes: | | | | | | | | | | | | | | | | | | | | | | | | | |

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| Projects 14 | Transportation System Mgmt Operations/ITS (2021) | UPWP Related |
| Lead Agency: | Metro | |

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| <p>ODOT Key Number:</p> | <p>20886</p> | <p>MTIP ID Number:</p> | <p>70875</p> |
| <p>Projects Description:</p> | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> Yes • <u>Proposed improvements:</u> Key 20886 is an older Transportation System Management and Operations (TSMO) project grouping bucket (PGB). The Metro (TSMO) program completes a periodic discretionary funding call and awards projects that support Intelligent Transportation System (ITS) improvements to the transportation network. Estimated revenues to be committed to specific projects are programmed in the MTIP and pre-position in their estimated allocation year. When funds are committed to specific projects, they are split off the PGB and programmed to the project. Key 20886 and 20888 is an older TSMO/ITS revenue bucket. These will be one of the first buckets to split and commit funds to support awarded TSMO projects currently completing their required scoping actions. • Source: Existing project. • <u>Amendment Action:</u> Reprogram funds out to FY 2025 to avoid conflicts with the Obligation Targets program • <u>Funding:</u> The funding is federal Surface Transportation Block Grant (STBG) funds. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: MPO Region wide ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 0 = No activity (for these program funds) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Traffic control devices and operating assistance other than signalization projects. • <u>Regional Significance Status:</u> N/A • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021 | | |

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| What is changing? | <u>AMENDMENT ACTION: REPROGRAM FUNDS</u> | | | | | |
| Additional Details: | The formal amendment completes reprograms the TSMO project out to FY 2025 to avoid conflicts with the Obligation Targets program. | | | | | |
| Why a Formal amendment is required? | Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, shifting committed funds from constrained years into unconstrained years requires a formal/full amendment complete. | | | | | |
| Total Programmed Amount: | Key | Prior Programmed Year | New Programmed year | Federal STBG | Match | Total |
| | 20886 | 2022 | 2025 | \$1,801,828 | \$206,277 | \$2,008,105 |
| Added Notes: | | | | | | |

End of UPWP reprogramming Actions

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| Projects 15: | OR141/OR217 Curb Ramps (NEW PROJECT) | | | | | |
| Lead Agency: | ODOT | | | | | |
| ODOT Key Number: | 22431 | MTIP ID Number: | | | | TBD |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> <u>Metro UPWP Project:</u> No <u>Proposed improvements:</u> The project will construct ADA compliant curbs and ramps on OR 141 (Hall Blvd at two location between MP 2.57 to 7.07) and on SW 72nd Ave (between SW Beveland Rd to SW Varnes St) in the Tigard area. <u>Source:</u> New project. <u>Amendment Action:</u> Add the new ADA safety improvement project to the 2021-24 MTIP. <u>Funding:</u> Key 22431 will be federally funded. ODOT has not yet designated the specific programmatic fund type code to the project and is using the federal placeholder code of Advance Construction initially. While multiple federal fund type codes are possible that will fund the project, a possible federal conversion code of State STBG is be used (AC-STBGS) as the possible Advance Construction conversion code. <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> Location: On OR 141 (Hall Blvd at two locations and on SW 72nd Ave) Cross Street Limits: On SE 72nd Ave between SW Beveland Rd to SW Varnes St Overall Mile Post Limits: On OR 141 between MP 2.57 to MP 7.07 | | | | | |

- Current Status Code: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.).
- Air Conformity/Capacity Status:
The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety, Projects that correct, improve, or eliminate a hazardous location or feature.
- Regional Significance Status: The project is considered Regionally Significant as it contains federal funds and is located on an arterial that is identified as a Pedestrian Parkway in the Metro Pedestrian modeling network.
- Amendment ID and Approval Estimates:
 - STIP Amendment Number: 21-24-0761
 - MTIP Amendment Number: JN21-11-JUN
 - OTC approval required: Yes. Funding approval for ADA improvements occurred at the OTC’s January 2021 meeting
 - Metro approval date: Tentatively scheduled for July 8, 2021

AMENDMENT ACTION: ADD NEW PROJECT:

The formal amendment adds the new project to the 2021-24 MTIP based on the approval action by the Oregon Transportation Commission (OTC). Key 22431 is one of several projects that will be developed and funded by the OTC action. Below the table is the summary discussion from the OTC

| <i>Project/Program</i> | <i>Description</i> | <i>Amount</i> |
|-----------------------------------------------|------------------------------------------------------------------|----------------------|
| <i>Tolling Development and Implementation</i> | <i>Fund NEPA and system development through 2022</i> | <i>\$60 million</i> |
| <i>Interstate Bridge Replacement Program</i> | <i>Fund program development through 2024</i> | <i>\$30 million</i> |
| <i>ADA 2020-2022 Projects</i> | <i>Complete ADA projects through first milestone</i> | <i>\$147 million</i> |
| <i>ADA 2022-2024 Projects</i> | <i>Complete ADA projects through remainder of 2021-2024 STIP</i> | <i>\$90 million</i> |
| <i>Total</i> | | <i>\$327 million</i> |

Summary Minutes from the January OTC 2021 Meeting:

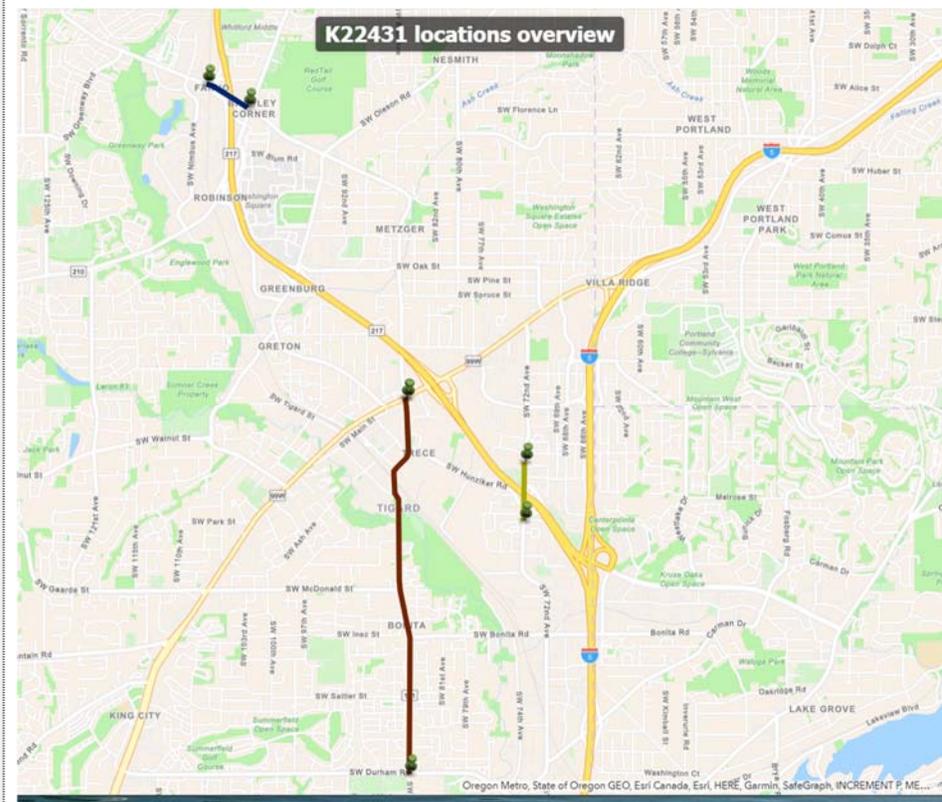
Presentation:
 ODOT Assistant Director for Finance and Compliance Travis Brouwer and ODOT Delivery and Operations Division Administrator Karen Rowe presented a [PowerPoint](#) on the 2021-2024 STIP investments. Brouwer gave an overview of the current proposed investments, which include \$60 million for tolling development and implementation, \$30 million for the Interstate Bridge Replacement Program, **and \$237 million for ADA curb ramps, for a total of \$327 in total funds needed.** However, only \$207 million in funding is anticipated from the federal government and the State Highway Fund. The \$120 million deficit would be borrowed from the Fix-It program in the 2024-2027 STIP, which was incorporated into the funding

What is changing?

scenario approved by the commission last month. **ODOT is requesting the commission move forward on funding \$147 million for ADA curb ramps at today’s meeting** to stay on track to meet the settlement agreement, then defer the remainder of the STIP amendment until the March meeting of the OTC. ODOT will bring back proposals that coordinate the use of additional state and federal STIP funding with COVID-19 relief funding. Rowe provided the background on the ADA settlement agreement, **which requires ODOT to complete 7,770 ADA ramps by 2022. Since 2018, ODOT has completed 2,337 ramps, has 1,693 currently in construction, 5,370 in design, and is actively working to determine how to be more efficient and effective in order to reduce the overall cost.** ODOT’s goal is to improve project efficiency by 30% to 40% by 2023. Coordination is being done with cities and counties to combine projects, so all surface treatment projects receive ADA curb ramp upgrades at the same time. Brouwer requested the commission approve \$147 million in additional federal funding for the construction of ADA curb ramps in 2021 and 2022.

Additional Details:

Project Location Information



Why a Formal amendment is required?

Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal/full amendment.

Total Programmed Amount:

The total programming amount for Key 22431 is \$2,736,658

Added Notes:

OTC approval was required and occurred during January 2021 meeting.

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| Projects 16: US30BY Curb Ramps (NEW PROJECT) | |
| Lead Agency: | ODOT |
| ODOT Key Number: | 22432 MTIP ID Number: TBD |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project will construct ADA compliant curbs and ramps on US30 Bypass in the NE Portland area. • <u>Source:</u> New project. • <u>Amendment Action:</u> Add the new ADA safety improvement project to the 2021-24 MTIP. • <u>Funding:</u> Key 22432 will be federally funded. ODOT has not yet designated the specific programmatic fund type code to the project and is using the federal placeholder code of “Advance Construction” initially. While multiple federal fund type codes are possible that will fund the project, a possible federal conversion code of State STBG is be used (AC-STBGS) as the possible Advance Construction conversion code. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: On US30 Bypass at various locations ○ Approximate Cross Street Limits – 4 segments: <ul style="list-style-type: none"> ▪ From N Philadelphia Ave to NE Flaske Ave ▪ OR99W to OR99E ▪ OR99E to N MLK ▪ N. MLK to east of 162nd Ave ○ Overall Mile Post Limits: On OR 30 Bypass between MP 1.28 to MP 14.76 • <u>Current Status Code:</u> 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety, Projects that correct, improve, or eliminate a hazardous location or feature. • <u>Regional Significance Status:</u> The project is considered Regionally Significant as it contains federal funds and is located on an arterial that is identified as a Pedestrian Parkway in the Metro Pedestrian modeling network. |

- Approval Estimates:
 - STIP Amendment Number: 21-24-0763
 - MTIP Amendment Number: JN21-11-JUN
 - OTC approval required: Yes. Funding approval for ADA improvements occurred at the OTC’s January 2021 meeting
 - Metro approval date: Tentatively scheduled for July 8, 2021

AMENDMENT ACTION: ADD NEW PROJECT:

The formal amendment adds the new project to the 2021-24 MTIP based on the approval action by the Oregon Transportation Commission (OTC). Key 22431 is one of several projects that will be developed and funded by the OTC action. Below the table is the summary discussion from the OTC

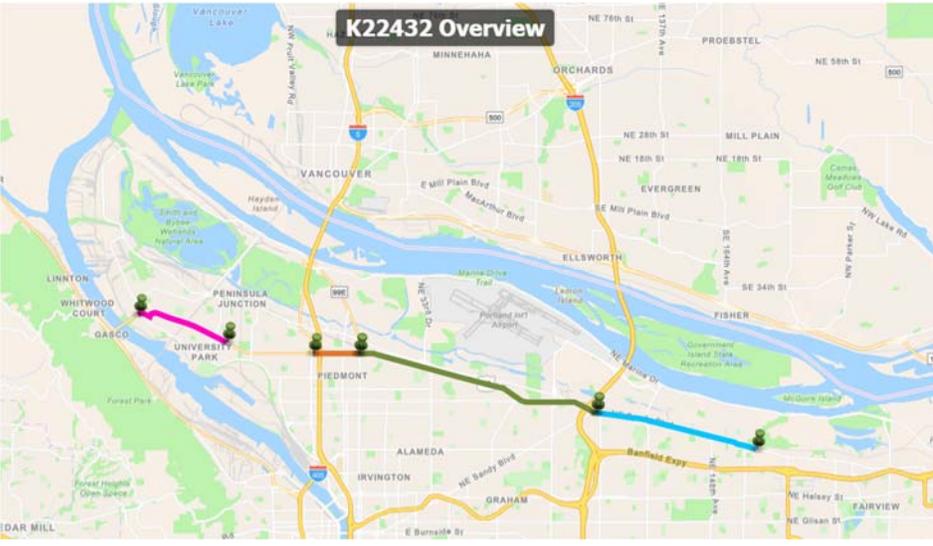
| <i>Project/Program</i> | <i>Description</i> | <i>Amount</i> |
|-----------------------------------------------|------------------------------------------------------------------|----------------------|
| <i>Tolling Development and Implementation</i> | <i>Fund NEPA and system development through 2022</i> | <i>\$60 million</i> |
| <i>Interstate Bridge Replacement Program</i> | <i>Fund program development through 2024</i> | <i>\$30 million</i> |
| <i>ADA 2020-2022 Projects</i> | <i>Complete ADA projects through first milestone</i> | <i>\$147 million</i> |
| <i>ADA 2022-2024 Projects</i> | <i>Complete ADA projects through remainder of 2021-2024 STIP</i> | <i>\$90 million</i> |
| <i>Total</i> | | <i>\$327 million</i> |

Summary Minutes from the January OTC 2021 Meeting:

Presentation:

ODOT Assistant Director for Finance and Compliance Travis Brouwer and ODOT Delivery and Operations Division Administrator Karen Rowe presented a [PowerPoint](#) on the 2021-2024 STIP investments. Brouwer gave an overview of the current proposed investments, which include \$60 million for tolling development and implementation, \$30 million for the Interstate Bridge Replacement Program, **and \$237 million for ADA curb ramps, for a total of \$327 in total funds needed.** However, only \$207 million in funding is anticipated from the federal government and the State Highway Fund. The \$120 million deficit would be borrowed from the Fix-It program in the 2024-2027 STIP, which was incorporated into the funding scenario approved by the commission last month. **ODOT is requesting the commission move forward on funding \$147 million for ADA curb ramps at today’s meeting** to stay on track to meet the settlement agreement, then defer the remainder of the STIP amendment until the March meeting of the OTC. ODOT will bring back proposals that coordinate the use of additional state and federal STIP funding with COVID-19 relief funding. Rowe provided the background on the ADA settlement agreement, **which requires ODOT to complete 7,770 ADA ramps by 2022. Since 2018, ODOT has completed 2,337 ramps, has 1,693 currently in construction, 5,370 in design, and is actively working to determine how to be more efficient and effective in order to reduce the overall cost.** ODOT’s goal is to improve project efficiency by 30% to 40% by 2023. Coordination is being done with cities and counties to combine projects, so all surface treatment projects receive ADA curb ramp upgrades at the same

What is changing?

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| | <p>time. Mr. Brouwer requested the commission approve \$147 million in additional federal funding for the construction of ADA curb ramps in 2021 and 2022.</p> |
| <p>Additional Details:</p> | <p style="text-align: center;">Project Location Information</p>  |
| <p>Why a Formal amendment is required?</p> | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal/full amendment.</p> |
| <p>Total Programmed Amount:</p> | <p>The total programming amount for Key 22432 is \$17,223,369</p> |
| <p>Added Notes:</p> | <p>OTC approval was required and occurred during January 2021 meeting.</p> |

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| <p>Project 17:</p> | <p>OR99W: OR217 - SW Sunset Blvd & US30B: Kerby - 162nd Ave OR99W: N Schmeer Rd - SW Meinecke Pkwy & US30B: Kerby - 165th Ave</p> | | |
| <p>Lead Agency:</p> | <p>ODOT</p> | | |
| <p>ODOT Key Number:</p> | <p>21161</p> | <p>MTIP ID Number:</p> | <p>71170</p> |
| <p>Projects Description:</p> | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro SFY 2022 UPWP Project:</u> No • <u>Proposed improvements:</u> Upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Revise project MP limits and update project name as a result of adjusted limits | | |

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| | <ul style="list-style-type: none"> • <u>Funding:</u> Key 21161 is funded with federal Highway Safety Improvement Program funds. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: On OR99W and on US30 ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: OR99W - -5.71 to 15.95 and on US30 from 5.60 to 14.70 • <u>Current Status Code:</u> 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated). • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety – Highway Safety Implementation Program. • <u>Regional Significance Status:</u> Regionally Significant project (federal funds + Major Arterial (in the Metro UGB)) • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0783 ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: LIMITS CORRECTION</u></p> <p>The amendment corrects the milepost project limits based on the updated project charter. The limit changes are significant and result in a required adjustment to the project name. However, the project scope and programming costs remain unchanged.</p> |
| <p>Additional Details:</p> | <p>Project Location Information</p> |

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| <p>Why a Formal amendment is required?</p> | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, project limit changes greater than 0.25 miles requires a via a formal/full amendment.</p> |
| <p>Total Programmed Amount:</p> | <p>Key 21161 total programming remains unchanged at \$2,495,795</p> |
| <p>Added Notes:</p> | |

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| <p>Projects 18: Transportation System Mgmt Operations/ITS (2019)</p> | |
| <p>Lead Agency:</p> | <p>Metro</p> |
| <p>ODOT Key Number:</p> | <p>20884 MTIP ID Number: 70875</p> |
| <p>Projects Description:</p> | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project functions as a project grouping bucket (PGB) with federal funds that support Metro Transportation Systems Management and Operations (TSMO) project awards. When the projects are ready for MTIP and STIP programming, they are split from the bucket and committed to the specific TSMO project. |

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| | <ul style="list-style-type: none"> • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Splits off the remaining funds and commits them to ODOT’s new Metro awarded TSMO ATC upgrade and deployment project (also part of this amendment bundle). • <u>Funding:</u> The PGB is federally funded with Surface Transportation Block Grant (STBG) funds. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: At various locations throughout Region 1 ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: Multiple • <u>Current Status Code:</u> 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). • <u>Air Conformity/Capacity Status:</u> The PGB is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Traffic control devices and operating assistance other than signalization projects. • <u>Regional Significance Status:</u> The PGB contains Regionally Significant TSMO projects as they contains federal funds and will be located on various arterials in the Metro Motor Vehicle modeling network. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: SPLIT/COMBINE PROJECT:</u></p> <p>The formal amendment splits off the remaining federal STBG funds (\$5,760) along with local matching funds and will combine them into ODOT’s new Metro awarded TSMO Advance Traffic Controller (ATC) upgrade and deployment project. The total federal award for ODOT’s project is \$239,507. The remaining needed federal funds will be split from Key 20885 and applied ODOT’s new ATC project. As a result of the reduction to Key 20884, key 20884 is now “zeroed programmed” with all funds now committed to Metro awarded TSMO projects</p> |
| <p>Additional Details:</p> | <p>With all funds now programmed to other specific TSMO projects, Key 20884 is now considered “Completed” and will be removed from the MTIP during the new full MTIP Update.</p> |

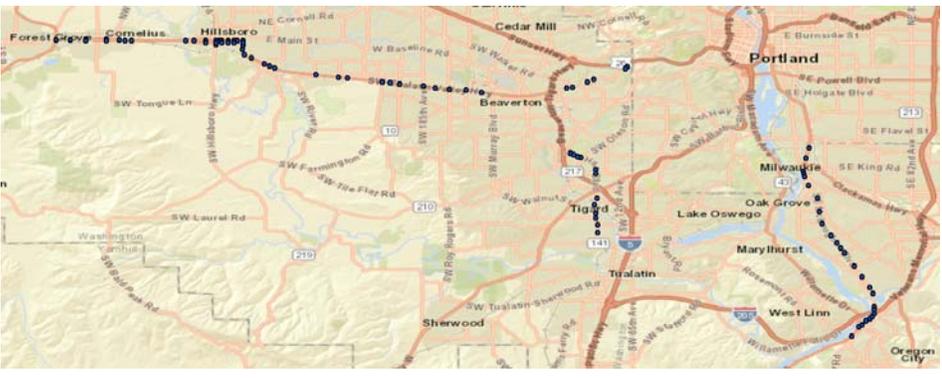
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| Why a Formal amendment is required? | While to funding split/combine actions can occur administratively, it is tied to the addition of the new ODOT ATC TSMO project. Therefore, it follows the formal amendment process as required for the new ODOT ATC project. |
| Total Programmed Amount: | The total programming amount for Key 20884 decreases from \$6,419 to \$0 |
| Added Notes: | Metro approved the FY 2019-21 TSMO awards during January 2020. |

| Projects 19: Transportation System Mgmt Operations/ITS (2020) | |
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| Lead Agency: | Metro |
| ODOT Key Number: | 20885 MTIP ID Number: 70875 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project functions as a project grouping bucket (PGB) with federal funds that support Metro Transportation Systems Management and Operations (TSMO) project awards. When the projects are ready for MTIP and STIP programming, they are split from the bucket and committed to the specific TSMO project. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Splits off \$233,747 of STBG funds (and required match) to support the new ODOT ATC project (see next project). The amendment also pushes-out the programming year to FY 2025 to avoid conflicts with the Obligation Targets program. • <u>Funding:</u> The PGB is federally funded with Surface Transportation Block Grant (STBG) funds. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: At various locations throughout Region 1 ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: Multiple • <u>Current Status Code:</u> 7 = Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated. • <u>Air Conformity/Capacity Status:</u> The PGB is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Traffic control devices and operating assistance other than signalization projects. |

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| | <ul style="list-style-type: none"> • Regional Significance Status: The PGB contains Regionally Significant TSMO projects as they contains federal funds and will be located on various arterials in the Metro Motor Vehicle modeling network. • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| What is changing? | <p><u>AMENDMENT ACTION: SPLIT/COMBINE PROJECT:</u></p> <p>The formal amendment splits off \$233,747 of STBG along with local matching funds and will combine them into ODOT’s new Metro awarded TSMO Advance Traffic Controller (ATC) upgrade and deployment project. The total federal award for ODOT’s project is \$239,507. The remaining needed federal funds originate from Key 20884. The remaining funding years for Key 20885 also is pushed-out to FY 2025 to avoid conflicts with the Obligation Targets program.</p> |
| Additional Details: | . |
| Why a Formal amendment is required? | While to funding split/combine actions can occur administratively, it is tied to the addition of the new ODOT ATC TSMO project. Therefore, it follows the formal amendment process as required for the new ODOT ATC project. |
| Total Programmed Amount: | The STBG programming amount for Key 20885 decreases from \$1,744,598. The total project revenues for the TSMO bucket decreases from \$1,944,275 to \$1,683,775 |
| Added Notes: | Metro approved the FY 2019-21 TSMO awards during January 2020. |

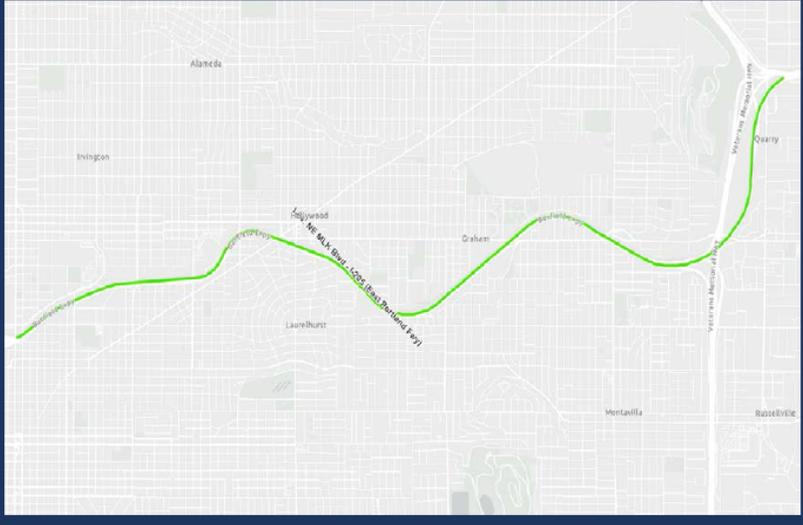
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| Projects 20: | Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy (NEW PROJECT) | | |
| Lead Agency: | ODOT | | |
| ODOT Key Number: | New - TBD | MTIP ID Number: | TBD |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project will Purchase Advanced Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing at various locations in Region 1 • <u>Source:</u> New project. • <u>Amendment Action:</u> Add the new Metro awarded Transportation Systems Management and Operations (TSMO) project to the 2021-24 MTIP. | | |

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| | <ul style="list-style-type: none"> • Funding: The project is federally funded and will utilize Surface Transportation Block Grant (STBG) funds. The required STBG funds are split from Keys 20884 and 20885 and combined here into this project. • Location, Limits and Mile Posts: <ul style="list-style-type: none"> ○ Location: At various locations throughout Region 1 ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: Multiple • Current Status Code: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). • Air Conformity/Capacity Status: The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Traffic control devices and operating assistance other than signalization projects. • Regional Significance Status: The project is considered Regionally Significant as it contains federal funds and is located on an various arterials in the Metro Motor Vehicle modeling network. • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: ADD NEW PROJECT:</u></p> <p>The formal amendment adds the new project to the 2021-24 MTIP. The Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy project is one of four new ATC upgrade projects awarded through the Metro FY 2019-21 TSMO funding call. The project will deploy and install new Advance Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing to support the ongoing Next Generation Transit Signal Priority Project, for smarter signal priority at various locations throughout Region 1.</p> <p>Funding for the project is from Keys 20884 and 20885 which is being combined into the new project.</p> |
| <p>Additional Details:</p> | <p>Project Location Information</p> |

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| <p>Why a Formal amendment is required?</p> | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal/full amendment.</p> |
| <p>Total Programmed Amount:</p> | <p>The total programming amount for the new TSMO awarded project is \$266,920</p> |
| <p>Added Notes:</p> | <p>Metro approved the FY 2019-21 TSMO awards during January 2020.</p> |

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| <p>Projects 21:</p> | <p>I-84: NE Martin Luther King Jr Blvd - I-205 (Cancel Project)</p> | | |
| <p>Lead Agency:</p> | <p>ODOT</p> | | |
| <p>ODOT Key Number:</p> | <p>21800</p> | <p>MTIP ID Number:</p> | <p>71200</p> |
| <p>Projects Description:</p> | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project was planned to complete the required design activities for a future pavement rehabilitation project to occur on I-84 from Martin Luther King Blvd east to the I-205 junction. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> The latest review of the project limits and surface conditions indicated the pavement condition is not in as bad shape as anticipated. Therefore, ODOT is now recommending that the project delayed, removed from the MTIP and STIP, and then be re-added to the 2024-27 STIP. • <u>Funding:</u> The project is federally funded with National Highway Performance Program (NHPP) funds. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: On I-84 ○ Cross Street Limits: MLK Blvd east to I-205 ○ Overall Mile Post Limits: 0.40 to 7.12 (6.72 miles total) | | |

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| | <ul style="list-style-type: none"> • <u>Current Status Code:</u> 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Safety - Pavement resurfacing and/or rehabilitation. Additionally, only the Preliminary Engineering phase was programmed in the MTIP and STIP. Removing the funds and project through this amendment has no impact on air quality or mobility. • <u>Regional Significance Status:</u> The project is not considered regionally significant with only PE programmed. Once the full project was programmed, it would be considered Regionally Significant as it contains federal funds and is located on a “Throughway” in the Metro Motor Vehicle modeling network. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: CANCEL PROJECT:</u></p> <p>The formal amendment cancels the project and removes it from the MTIP and STIP. The focus of the PE design phase supports the future project that will improve ride quality, repair rutted and worn pavement, and provide a safe driving surface on a high-volume, urban interstate facility</p> <p>In November 2020 the IM program funding manager requested to delay this project to a future Statewide Transportation Improvement Program (STIP) cycle. The reason for cancellation was due to the fact that the pavement along this segment of Interstate-84 is in better condition than expected. The IM Program manager recommends optimizing the current paving investment and postponing this project to the next STIP update</p> |
| <p>Additional Details:</p> | <p>Project Location Information</p> |

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| | <p style="text-align: center;">TOTAL ESTIMATED COST: \$1,000,000</p> <p style="text-align: center;">LOCATION DETAILS</p> <p>COUNTY: Multnomah CITY: Portland</p> <p>HIGHWAY: I-84 Columbia River Highway</p> <p style="text-align: center;"> ODOT MAP LINK GOOGLE MAP LINK </p>  |
| <p>Why a Formal amendment is required?</p> | <p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, canceling a project in the MTIP requires a formal/full amendment.</p> |
| <p>Total Programmed Amount:</p> | <p>The total programming amount for the I-84 rehab design project decreases from \$1,000,000 to \$0</p> |
| <p>Added Notes:</p> | <p>OTC approval was required. A copy of the OTC staff report follows this entry.</p> |



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 23, 2021

TO: Kristopher W. Strickler
Director

FROM: Rian Windsheimer
Region 1 Manager

SUBJECT: Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to cancel Interstate-84: Northeast Martin Luther King Junior Boulevard - Interstate-205 project.

Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) to cancel the Interstate-84: Northeast Martin Luther King Junior Boulevard - Interstate-205 project.

STIP Amendment Funding Summary

| Project/Funding Source | Current Funding | Proposed Funding |
|----------------------------------------------|--------------------|--------------------|
| I-84: NE Martin Luther King Jr Blvd to I-205 | \$1,000,000 | \$0 |
| State Interstate Maintenance Program | \$0 | \$1,000,000 |
| TOTALS | \$1,000,000 | \$1,000,000 |

Project to be cancel:

| I-84: NE Martin Luther King Jr Blvd to I-205 (KN 21800) | | | |
|---------------------------------------------------------|------|--------------------|------------|
| PHASE | YEAR | COST | |
| | | Current | Proposed |
| Preliminary Engineering | 2021 | \$1,000,000 | \$0 |
| Right of Way | N/A | \$0 | \$0 |
| Utility Relocation | N/A | \$0 | \$0 |
| Construction | N/A | \$0 | \$0 |
| TOTALS | | \$1,000,000 | \$0 |

Background:

In the 2021-2024 STIP, this project was originally awarded \$1,000,000 Fix-it Interstate Maintenance (IM) funds which includes the state match requirement.

The intent of the project was to design for a future pavement resurfacing project to repair ruts and surface wear.

In November 2020 the IM program funding manager requested to delay this project to a future Statewide Transportation Improvement Program (STIP) cycle.

March 23, 2021
Page 2

The reason for cancellation was due to the fact that the pavement along this segment of Interstate-84 is in better condition than expected. The IM Program manager recommends optimizing the current paving investment and postponing this project to the next STIP update.

\$620 in funds have been expended on the project. Journal entries are in process to remove the charges.

Project Timeline:

October 1, 2020 Project award approved in the 2021-2024 STIP
November 2020 Statewide IM program manager requested to delay project
February 2021 Region 1 Project delivery request to cancel project.

Options:

With approval, the project will be cancelled from the Statewide Transportation Improvement Program (STIP).

Attachments:

- Attachment 1 – Location & Vicinity Maps

Copies to:

| | | | |
|----------------|----------------|-----------------------------|----------------|
| Cooper Brown | Karen Rowe | Rian Windsheimer | Shelli Romero |
| Travis Brouwer | Mac Lynde | Tova Peltz | Chris Ford |
| Tom Fuller | Jeff Flowers | Ted Miller | Talena Adams |
| Lindsay Baker | Arlene Santana | Gabriela Garcia | Adriana Antelo |
| Jess McGraw | Alice Bibler | Justin Moderie | Amanda Sandvig |
| Jen Bachman | | | |

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| Projects 22: Electric Bus Purchase (Metro Fund Exchange) (Cancel Project) | |
| Lead Agency: | TriMet |
| ODOT Key Number: | 22188 MTIP ID Number: 71217 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project was planned to purchase replacement electric buses for the TriMet bus fleet. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Cancel the project from the MTIP. The planned procurement during federal fiscal year 2023 is now not feasible. The CMAQ funds now are being shifted to the TriMet MAX Red Line Extension. See next project. • <u>Funding:</u> The project is federally funded with Metro awarded Congestion Mitigation Air Quality (CMAQ). • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: N/A - Regional |

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| | <ul style="list-style-type: none"> ○ Cross Street Limits: N/A – Transit procurement ○ Overall Mile Post Limits: N/A ● <u>Current Status Code:</u> 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.). ● <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Mass Transit - Purchase of new buses and rail cars to replace existing vehicles or for minor expansions of the fleet 1. ● <u>Regional Significance Status:</u> The project is considered regionally significant. ● <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for July 8, 2021 |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: CANCEL PROJECT:</u></p> <p>The formal amendment cancels the project and removes it from the MTIP and STIP. The Electric Bus procurement originally was an approved Metro/TriMet fund exchange project committing the CMAQ fund in support of the electric bus procurement. However, TriMet determine the procurement could not occur in federal fiscal year (FFY) 2023 and would have to be delayed.</p> <p>The CMAQ funds have a shelf-life obligation expiration date of the end of FFY 2023. Therefore, delaying the project to FFY 2024 was not an acceptable option.</p> <p>The use and award of CMAQ funds are more complicated than other federal fund programs. First CMAQ is an air quality improvement program that contains funding that support projects that must clearly provide air quality improvement benefits. Second, each project prosed to use CMAQ funds must include an approved air quality emissions reduction analysis providing the specific air quality improvements. Third, the review and approval of CMAQ funds for a specific projects requires approval from the ODOT State CMAQ manager and FHWA.</p> <p>As a result of the extra reviews and approval steps, shifting CMAQ to another project is a lengthy and complicated process. The process is summarized in the TriMet MAX Red Line Extension project where the CMAQ funds will be committed.</p> |
| <p>Additional Details:</p> | |

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| Why a Formal amendment is required? | Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, canceling a project in the MTIP requires a formal/full amendment. |
| Total Programmed Amount: | The total programming amount for the electric bus purchase decreases from \$5,512,506 to \$0 |
| Added Notes: | |

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| Projects 23: MAX Red Line Extension & Reliability Improvements | |
| Lead Agency: | TriMet |
| ODOT Key Number: | 20489 |
| | MTIP ID Number: 71230 |
| Projects Description: | <p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project will extend MAX Red Line from Beaverton to Fair Complex/Hillsboro Airport, double track single track sections near Gateway/NE 99th Ave and at PDX Airport with reconfigured station, plus construct new light rail bridge and Red Line station at Gateway. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> The formal amendment adds the CMAQ funds from Key 22188 and updates the phase costs. • <u>Funding:</u> The funding for the project includes a Federal Transit Administration (FTA) Section 5309 Small Starts grant, federal Surface Transportation Block Grant (STBG) funds, federal Congestion Mitigation Air Quality (CMAQ), and local funds. • <u>FTA Conversion Code:</u> 5307. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Red Line light rail system ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A • <u>Current Status Code:</u> 6 = Pre-construction activities (pre-bid, construction management oversight, etc.). • <u>Air Conformity/Capacity Status:</u> The MAX Red Line Extension is considered a capacity enhancing project and completed its required air conformity analysis and modeling in the Metro Transit network for the Regional Transportation Plan (RTP) • <u>Regional Significance Status:</u> The project is regionally significant. |

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| | <ul style="list-style-type: none"> • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: JN21-11-JUN ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for July 8, 2021. |
| <p>What is changing?</p> | <p><u>AMENDMENT ACTION: COST INCREASE</u></p> <p>Upon review by Metro’s air quality planner, the State CMAQ Manager, and FHWA, the TriMet MAX Red Line Extension project was approved as a suitable substitute for TriMet’s canceled Electric Bus Purchase in Key 22188. Through this amendment, the CMAQ funds are being added to this project while Key 22188 is being canceled. As the project now forward towards the start of Construction, the phase costs are being updated as well in preparation for approval to obligate and expend the FTA 5309 Small Starts grant.</p> <p>Obligation approval is projected to occur before the end of FY 2021 (by September, 2021). The updated phase. The phase cost updates result in a minor cost increase to the project (in ROW and Construction). The cost increase totals \$7,776,259 which equals a 3.5% increase to the project.</p> |
| <p>Additional Details:</p> | <p style="text-align: center;">TriMet MAX Red Line Extension Overview</p>  <p>The map illustrates the TriMet MAX Red Line Extension route. It starts in Hillsboro and proceeds through the following stations: Hatfield Government Center, Hillsboro Central/SE 48th/51st, Tuality Hospital/SE 8th, Washington/SE 12th, Fair Complex/Hillsboro Airport, Hawthorn Farm, Orenco, Quatama, Willow Creek/SW 185th Transit Center, Elmonica/SW 170th, Merlo/SW 158th, Beaverton Creek, Millikan Way, Beaverton Central, and Beaverton Transit Center. A red dashed line indicates the extension from Hawthorn Farm to Beaverton. A legend shows a red dashed line for 'MAX Red Line Extension'. An arrow points from Beaverton Transit Center towards 'TO CITY CENTER'.</p> |

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| <p>Why a Formal amendment is required?</p> | <p>The process to shift CMAQ to a suitable substitute normally requires a full/formal amendment to complete due to the multiple reviews and approval steps required.</p> |
| <p>Total Programmed Amount:</p> | <p>Including the project development funding for the project as part of the cost, Key 20849 increases from \$216,868,202 to \$224,644,461 which equals a 3.5% increase to the project.</p> |
| <p>Added Notes:</p> | <p>Two attachments are included:</p> <ol style="list-style-type: none"> 1. A Better Red Fact Sheet 2. MAX Red Line CMAQ Air Quality Emission Reduction Analysis |

Note: The Amendment Matrix located on the next page is included as a reference for the rules and justifications governing Formal Amendments and Administrative Modifications to the MTIP that the MPOs and ODOT must follow.

METRO REQUIRED PROJECT AMENDMENT REVIEWS

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

- Verification as required to programmed in the MTIP:
 - Awarded federal funds and is considered a transportation project
 - Identified as a regionally significant project.
 - Identified on and impacts Metro transportation modeling networks.
 - Requires any sort of federal approvals which the MTIP is involved.
- Passes fiscal constraint verification:
 - Project eligibility for the use of the funds
 - Proof and verification of funding commitment
 - Requires the MPO to establish a documented process proving MTIP programming does not exceed the allocated funding for each year of the four year MTIP and for all funds identified in the MTIP.
 - Passes the RTP consistency review: Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
 - RTP project cost consistent with requested programming amount in the MTIP

- If a capacity enhancing project – is identified in the approved Metro modeling network
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP.
- If not directly identified in the RTP’s constrained project list, the project is verified to be part of the MPO’s annual Unified Planning Work Program (UPWP) if federally funded and a regionally significant planning study that addresses RTP goals and strategies and/or will contribute or impact RTP performance measure targets.
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:

| ODOT-FTA-FHWA Amendment Matrix | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Type of Change | |
| FULL AMENDMENTS | |
| 1. Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized | |
| 2. Major change in project scope. Major scope change includes: <ul style="list-style-type: none"> • Change in project termini - greater than .25 mile in any direction • Changes to the approved environmental footprint • Impacts to AQ conformity • Adding capacity per FHWA Standards • Adding or deleting worktype | |
| 3. Changes in Fiscal Constraint by the following criteria: <ul style="list-style-type: none"> • FHWA project cost increase/decrease: <ul style="list-style-type: none"> • Projects under \$500K – increase/decrease over 50% • Projects \$500K to \$1M – increase/decrease over 30% • Projects \$1M and over – increase/decrease over 20% • All FTA project changes – increase/decrease over 30% | |
| 4. Adding an emergency relief permanent repair project that involves substantial change in function and location. | |
| ADMINISTRATIVE/TECHNICAL ADJUSTMENTS | |
| 1. Advancing or Slipping an approved project/phase within the current STIP (If slipping outside current STIP, see Full Amendments #2) | |
| 2. Adding or deleting any phase (except CN) of an approved project below Full Amendment #3 | |
| 3. Combining two or more approved projects into one or splitting an approved project into two or more, or splitting part of an approved project to a new one. | |
| 4. Splitting a new project out of an approved program-specific pool of funds (but not reserves for future projects) or adding funds to an existing project from a bucket or reserve if the project was selected through a specific process (i.e. ARTS, Local Bridge...) | |
| 5. Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data. | |
| 6. Changing name of project due to change in scope, combining or splitting of projects, or to better conform to naming convention. (For major change in scope, see Full Amendments #2) | |
| 7. Adding a temporary emergency repair and relief project that does not involve substantial change in function and location. | |

- Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
- Adheres to conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP.
- Is eligible for special programming exceptions periodically negotiated with USDOT.
- Programming determined to be reasonable of phase obligation timing and is consistent with project delivery schedule timing.
- Reviewed and initially assessed for Performance Measurement impacts.
- MPO responsibilities completion:
 - Completion of the required 30 day Public Notification period:
 - Project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.
 - Acting on behalf of USDOT to provide the required forum and complete necessary discussions of proposed transportation improvements/strategies throughout the MPO.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the June 2021 Formal MTIP amendment (JN21-11-JUN) will include the following:

- | <u>Action</u> | <u>Target Date</u> |
|-----------------------------------------------------------------|---------------------|
| ● Initiate the required 30-day public notification process..... | June 1, 2021 |
| ● TPAC notification and approval recommendation..... | June 4, 2021 |
| ● JPACT approval and recommendation to Council..... | June 17, 2021 |

- Completion of public notification process..... June 30, 2021
- Metro Council approval..... July 8, 2021

Notes:

* If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

USDOT Approval Steps (The below time line is an estimation only):

| <u>Action</u> | <u>Target Date</u> |
|-----------------------------------------------------------|--------------------|
| • Amendment bundle submission to ODOT for review..... | July 15, 2021 |
| • Submission of the final amendment package to USDOT..... | July 15, 2021 |
| • ODOT clarification and approval..... | Late July, 2021 |
| • USDOT clarification and final amendment approval..... | Early August, 2021 |

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:**
 - a. Amends the 2021-24 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 20-5110 on July 23, 2020 (FOR THE PURPOSE OF ADOPTING THE 2021-2024 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA).
 - b. Oregon Governor approval of the 2021-24 MTIP: July 23, 2020
 - c. 2021-2024 Statewide Transportation Improvement Program (STIP) Approval and 2021 Federal Planning Finding: September 30, 2020
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds, or obtain the next required federal approval step as part of the federal transportation delivery process.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 21-5182 consisting of twenty-three projects which will complete UPWP project grouping buckets reprogramming for Metro and complete required adjustments, additions, or cancelations to projects impacting ODOT and TriMet enabling them to obtain their next federal approval step

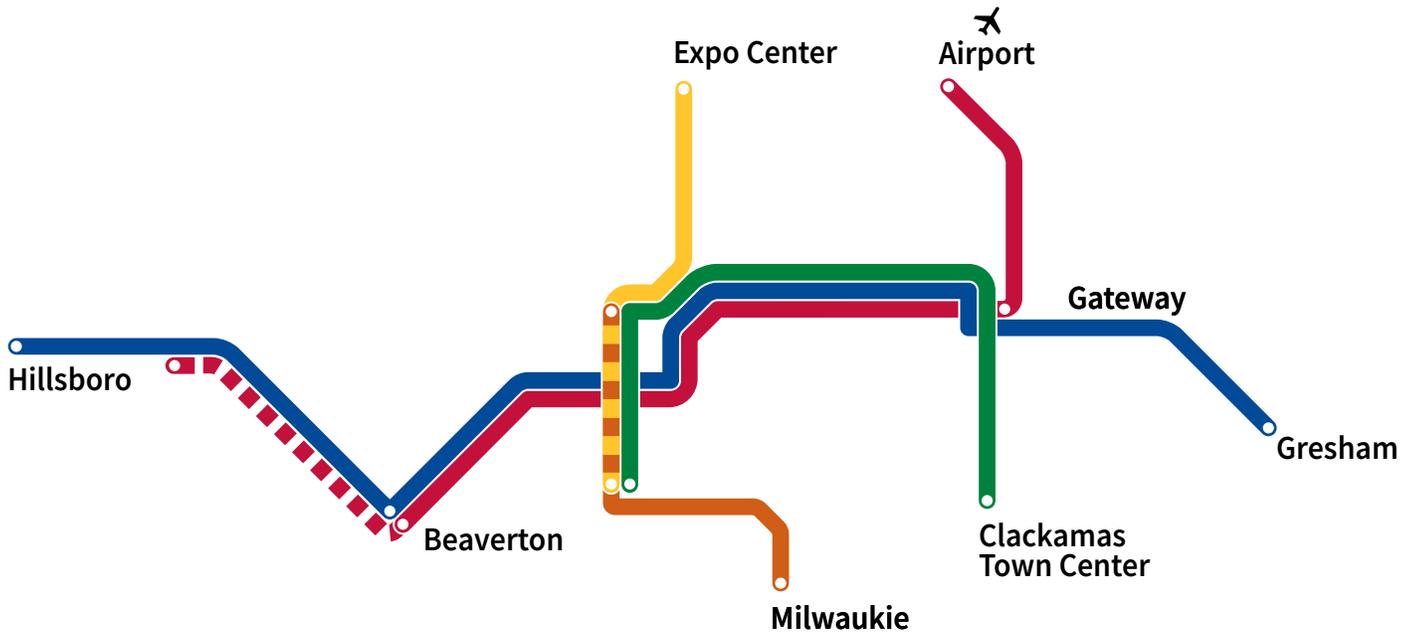
Attachments: 2

1. A Better Red Fact Sheet
2. MAX Red Line CMAQ Air Quality Emission Reduction Analysis

A BETTER RED



A Better Red extends MAX Red Line west to serve 10 more stations and improves schedule reliability for the entire MAX system.



More service

Extending the MAX Red Line west allows more people to enjoy a one-seat ride to Portland International Airport and other destinations. The extension improves MAX frequency at 10 stations in Beaverton and Hillsboro:

- ▶ Beaverton Central
- ▶ Millikan Way
- ▶ Beaverton Creek
- ▶ Merlo/SW 158th
- ▶ Elmonica/SW 170th Ave
- ▶ Willow Creek/SW 185th TC
- ▶ Quatama
- ▶ Orenco
- ▶ Hawthorn Farm
- ▶ Fair Complex/Hillsboro Airport

Improved reliability

MAX Red Line has two single-track sections, near Gateway and Portland International Airport, where trains traveling in opposite directions have to take turns. These bottlenecks affect schedule reliability for the entire MAX system, which has grown substantially since the Red Line was constructed. Adding a second track in these sections will improve service for all riders.

New connections for people biking and walking

Near the new tracks at Gateway and Portland International Airport, new multi-use paths will create more options for accessing transit, getting around on foot, bike, scooter and other mobility devices, and better access for emergency services.

Improvements to be constructed in three areas

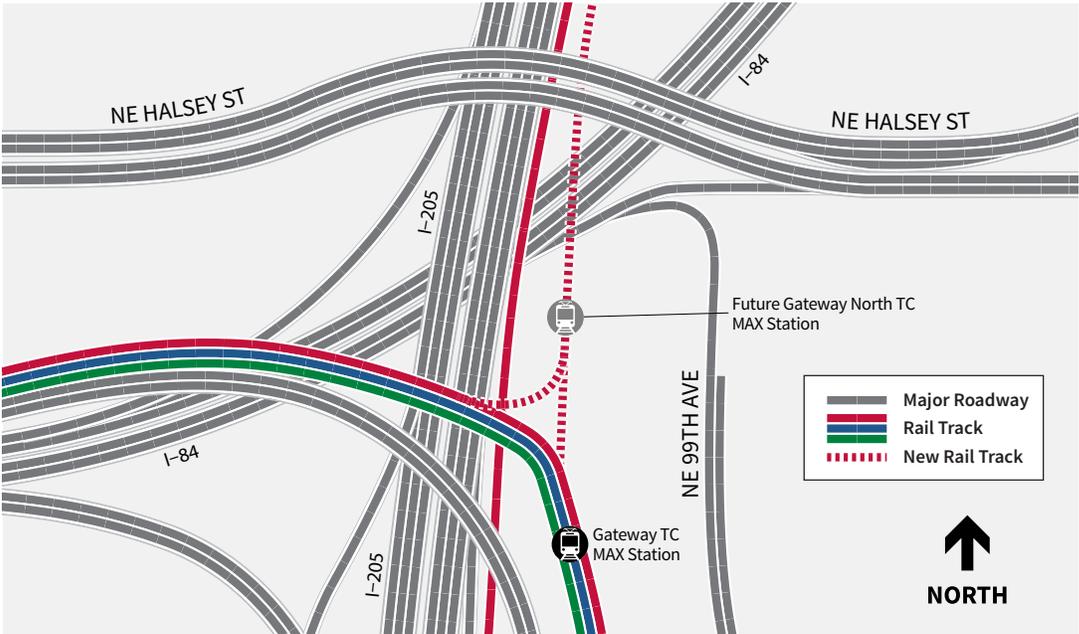
At Fair Complex/Hillsboro Airport MAX Station

Crews will work on signals and switches in the existing trackway, and build a new walkway and break facility for MAX operators.



At Gateway/NE 99th Ave Transit Center

A new MAX station platform will be constructed about 500 feet north of the existing transit center. This new platform will serve Red Line trains coming from Portland International Airport only. All other trains will continue to serve the existing platforms.



Conceptual rendering subject to change



Conceptual rendering subject to change

Two new bridges will be constructed to accommodate the second track:

- ▶ Spanning existing MAX track and I-205 Multi-Use Path adjacent to Gateway Green Park.
- ▶ Spanning Interstate 84 and Union Pacific Railroad tracks.

A new pathway will connect the new platform with the existing platforms and bus stops., and extend north on the new bridge over I-84, into Gateway Green Park.

At Portland International Airport

The second track will be constructed adjacent to the existing track, along with a new multi-use path between the MAX station and NE 82nd Way.

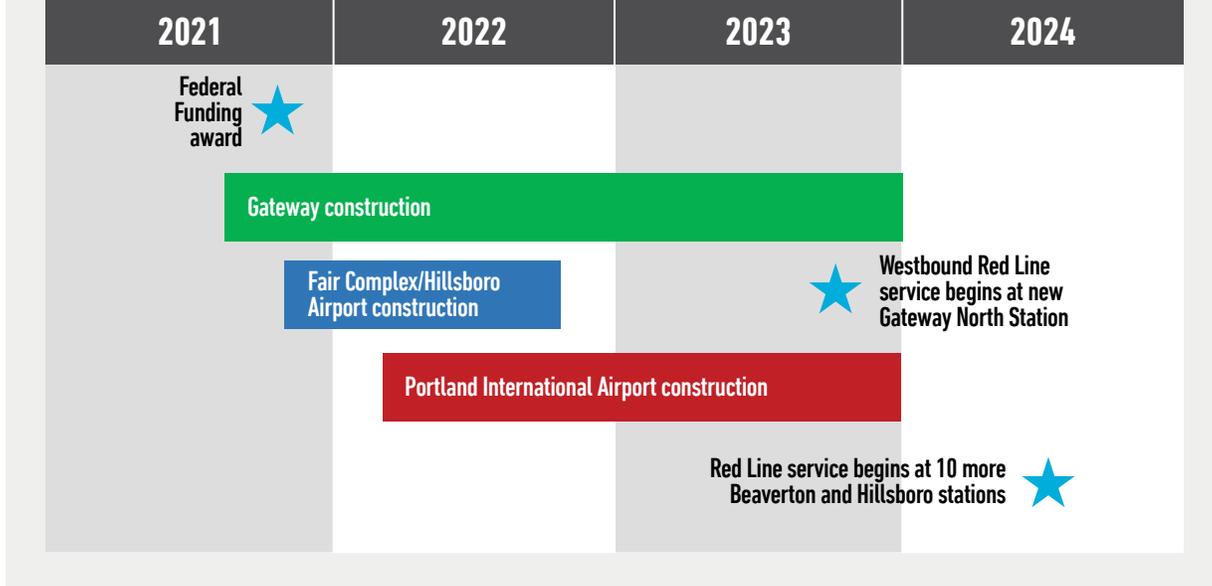


Conceptual rendering subject to change



Conceptual rendering subject to change

ESTIMATED PROJECT SCHEDULE



What to expect during construction

Construction information will be updated regularly at trimet.org/betterred. Some things to expect include:

- ▶ Closure of some Park & Ride spaces at Fair Complex/Hillsboro Airport Station and Gateway/NE 99th Ave Transit Center
- ▶ MAX service interruptions, with shuttle buses connecting stations
- ▶ Various lane closures, including nighttime lane closures on I-84
- ▶ Weekend closures of I-84
- ▶ Construction staging in a small portion of Gateway Green Park
- ▶ Short-term closure of I-205 Multi-Use Path adjacent to Gateway Green Park

- ▶ Daytime pile driving adjacent to I-84 at Gateway
- ▶ Nighttime and weekend construction activity

Economic benefits

In addition to extending MAX service and improving system reliability, the project is expected to create up to 1,200 jobs for the region. The project has a goal of awarding 19 percent of the design funding and 20 percent of the construction funding to Disadvantaged Business Enterprise (DBE) firms, supporting businesses owned by people of color and women.

Learn more at trimet.org/betterred/benefits

Contact

Questions about the Better Red project? Visit trimet.org/betterred to learn more. Or, call 503-962-2150. Email us: betterred@trimet.org.

Available in other formats



| INSTRUCTIONS | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|----------------------------------------------------|
| Review ODOT's CMAQ Guidelines for allowable project types and eligibility (ODOT allows fewer project types than FHWA) | | | |
| ODOT CMAQ Guidelines | | | |
| PROJECT INFORMATION | | | |
| Project Title | MAX Red Line Extension | | |
| MPO (if Applicable) | Metro | STIP # | 20849 |
| Agency (applicant) | TriMet | | |
| Address | 1800 SW 1 st Avenue, Suite 300, Portland, Oregon | | |
| Primary Contact | David Unsworth | | |
| Telephone | 503-720-6091 | Public-Private Partnership? Y/N | N |
| Email | unsworلد@trimet.org | | |
| Responsible Agency | TriMet | | |
| Project Location (City) | City of Portland (Portland Airport) to Fair Complex/Hillsboro Airport (Washington County) | | |
| Project Delivery | Certified Agency: <input checked="" type="checkbox"/> SFLP (non MPO) <input type="checkbox"/> ODOT Delivered <input type="checkbox"/> | | |
| PROJECT CATEGORY (Applicant Certifies by checking box that Project meets requirements as outlined in ODOT CMAQ Guidelines) | | | |
| <input checked="" type="checkbox"/> | Public Transportation Improvements | <input type="checkbox"/> | Traffic Flow Improvements for Congestion Reduction |
| <input type="checkbox"/> | Transp. Options Strategies | <input type="checkbox"/> | Vehicle and Fuel Efficiency Efforts |
| <input type="checkbox"/> | Pedestrian/Bicycle Infrastructure | <input type="checkbox"/> | Road Dust Mitigation (PM10 areas only) |
| <input type="checkbox"/> | ITS for Congestion Reduction | <input type="checkbox"/> | Project is a TCM |
| Infrastructure project is on a: <input type="checkbox"/> Roadway, <input type="checkbox"/> Bikeway or Sidewalk, <input checked="" type="checkbox"/> Transit, <input type="checkbox"/> Other | | | |
| Non-Infrastructure Project includes: <input type="checkbox"/> Operating Assistance, <input type="checkbox"/> Outreach/Education | | | |
| PROJECT LOCATION | | | |
| Street(s) Name (or Nearest Street): Portland Airport to Fair Complex/Hillsboro Airport Station (Hillsboro) | | Functional Class: High Capacity Transit, Fixed Guideway – Light Rail | |
| Cross Streets, Termini: Portland Airport to Fair Complex/Hillsboro Airport Station (Hillsboro) | | Total Length: Before extension: 20 miles After extension: 28 miles | |

| DETAILED COST ESTIMATE / SCHEDULE | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------|-----------------------|---------------|---------|---------------|
| [Provide cost, including match, for eligible components. Use additional sheets for detailed estimate] | | | | | | |
| Phase | Program FYs (beginning and completion) | Other Federal | CMAQ | Local | non Fed | Total |
| Project Development | | | | | | |
| Design/ Engineering | FFY 2019, 2020 & 2021 | \$4,000,000 | | \$14,184,000 | | \$18,184,000 |
| Right of Way | FFY 2021 | \$2,608,462 | | \$2,608,461 | | \$5,216,923 |
| Construction | FFY 2021, 2022, 2023 & 2024 | \$97,391,538 | \$4,946,372 (FFY2022) | \$86,465,539 | | \$188,805,448 |
| Operating Assistance (if applicable) | | | | | | |
| Other | | | | | | |
| Totals | | \$103,999,999 | \$4,946,372 | \$103,258,000 | | \$212,204,371 |
| Duration of Project Funding (Years): 4 years (opening in 2024) Expected first year of billing: FFY2021 (NOTE: detailed cost estimate as of late April 2021. Refinements to this estimate will get finalized in mid-May and will be included in the MTIP and STIP amendment to occur after approval) | | | | | | |
| Detail any CMAQ ineligible components and how they are funded. Provide source of all local/non-federal funds | | | | | | |
| The extension of the light rail and the operational realignment at the Gateway station are eligible activities under the federal and state CMAQ eligibility requirements/guidelines. Nearly half of the MAX Red Line Extension and Reliability Improvement project is being funded with local dollars as well as funding contributions from Metro (\$4M in STBG and \$4,946,372 from CMAQ.) The remaining portion of the project is funded through the FTA Capital Investment Grant (CIG) program. | | | | | | |
| PROJECT NARRATIVE | | | | | | |
| The MAX Red Line Extension and Reliability Improvement Project is comprised of two major components. On the westside, in Beaverton and the Hillsboro area, the project will extended the MEX Red Line its current terminus from Beaverton to Fair Complex/Hillsboro Airport station resulting in the Red Line accessing existing 10 Blue Line station stops including Beaverton Central, Milikan Way, Beaverton Creek, Merlo, SW 158th, El Monica/SW170th, Willow Creek, SW 185th Transit Center, Quatama, Orenco, Hawthorn Farm and Rail Complex/Hillsboro Airport. On the eastside, at Gateway and at PDX Airport, the project will double track single track sections near Gateway/NE 99th Ave and at PDX Airport. The double track work includes track, switch, and signalization work; construction of an operator break facility at the Fair Complex/ Hillsboro Airport Station and construction of a new light rail bridge and Red Line station at Gateway along with a new pedestrian and bike path to connect the existing and new platform, stations. The purchase of new light rail vehicles is included as part of the project to address the extension of service. | | | | | | |

EMISSIONS REDUCTIONS

The Metro transportation model and the EPA approved emissions model MOVES2014a are the primary tools used in the analysis of emissions benefits for the MAX Red Line Extension and Reliability Improvements Project. The transportation model provides forecast travel volumes for opening year conditions in a build and no-build scenario for the MAX Red Line Extension and Reliability Improvements. The travel demand model accounts for land use, population, and employment to inform and generate trips and vehicle miles traveled information by link. The information on the travel forecast volumes, estimated trip shifting, origin and destination, and other related modeled travel details are then used as inputs into the MOVES2014a emissions model to help determine the amount of air pollution produced (by individual pollutant) from mobile sources of emissions. The differences between a build and no-build scenario, which looks at mobile source emissions based on conditions of whether the project is built or not built, help to determine whether there is an emission reduction benefit as a result of the project. Further details regarding the transportation modeling and emissions analysis for the MAX Red Line Extension and Reliability Improvements Project can be found as part of the supplemental materials.

The results are modeled estimates of emissions reductions are for the MAX Red Line Extension and Reliability Improvements for the opening year of service (2024).

Use the following boxes to show estimated reduction amount (kg/day).

| | | | |
|-------|------|------|-------|
| VOC | .72 | CO | 18.74 |
| NOx | 2.41 | PM10 | N/A |
| PM2.5 | N/A | CO2 | N/A |

Duration of PM10 & CO Benefit Years

SUPPORTING INFORMATION

SUPPORTING INFORMATION: List all applicable and attach documents to submittal email

- Map showing project location (required)
- Indicate what level of Operating Assistance will be required (if applicable)
- Detailed Project Cost Estimate/Budget and Schedule (required)
- Detailed Timeline for Project (required)
- Documentation if Project is a TCM in an approved SIP
- Buy America information or waiver request (if applicable)
- Cost Effectiveness Assessment (required for MPOs)
- Overview of MPO public process and criteria in project selection (required for MPOs)
- Additional quantitative or qualitative emissions analysis information
- Project Sketch/drawings or plans (required)
- Any other supporting documentation that may support successful award

SUBMISSION

| | | | |
|---------------|-------------------------------------------------|-------|-------------|
| Submitted By: | Grace Cho, Metro, Senior Transportation Planner | Date: | May 5, 2021 |
|---------------|-------------------------------------------------|-------|-------------|

Name and Title

Submit Completed Application to:



Memo

Date: Friday, May 28, 2021
To: Transportation Policy Alternatives Committee and Interested Parties
From: Ted Leybold, Resource Development Manager
Grace Cho, Senior Transportation Planner
Subject: 2024-2027 Metropolitan Transportation Improvement Program (MTIP) Revenue Forecast

Purpose

To provide TPAC an overview of the 2024-2027 MTIP revenue forecast and obtain feedback on forecast methods for the Regional Flexible Fund element of the MTIP revenue forecast.

Introduction and Background

As part of Metro's responsibilities as the metropolitan planning organization (MPO) for the Portland region, the agency is responsible for the development and administration of the Metropolitan Transportation Improvement Program (MTIP). The MTIP is the four-year, near-term capital improvement plan-strategy for the metropolitan region.¹ Within the MTIP document are:

- A list of the transportation investment priorities for the upcoming federal fiscal years;
- A description of the prioritization processes to allocate available funds to transportation projects and programs, and compliance of those processes with regional guidance and federal laws;
- A measurement of the performance of those investments and progress toward federal performance targets and regional goals;
- A demonstration of compliance with federal TIP-related regulations; and
- Instructions, which communicate the monitoring measures and procedures for administering the MTIP.

The development of the MTIP is cooperatively developed by the MPO, state department of transportation, and transit agencies. Therefore, as part of the MTIP development process, key MTIP partners in the Portland region – ODOT (Region 1 and headquarters), TriMet, SMART, and Metro – work closely together to demonstrate how the region is working together to achieve the common goal of implementing the Regional Transportation Plan (RTP) and complying with applicable federal regulations to remain eligible for funding.

Revenue Forecast

In the early phase of developing the upcoming MTIP, a revenue forecast is established to gather a sense of the financial outlook for the upcoming four federal fiscal years. The revenue forecast is a snapshot estimate based on information known to that date related to federal and various state and local revenue streams. The revenue outlook serves multiple purposes. These include:

- 1) Provide context around the anticipated federal and regionally significant state and local investment in the region's transportation system over the next four federal fiscal years;
- 2) Frame a discussion of the priorities and tradeoffs in the allocation of funds by different fund administrators, including MPOs and State DOTs;

¹ The MTIP includes some maintenance-related investments, such as federal transportation monies restricted for the use pavement maintenance activities on the interstate system and transit bus replacement.

- 3) Help demonstrate fiscal constraint over the course of the next four fiscal years and show the region is not over spending beyond what is expected to be available and can deliver in the MTIP;
- 4) Help to monitor project delivery, including the hiccups and other potential challenges to emerge in implementing the MTIP and expending of planned investments in a given year.

The snapshot of the near-term financial outlook provides a look across revenue estimates of federal and relevant state-local funds being administered by ODOT and transit agency partners (TriMet and SMART). The revenue outlook in the broader context plays an important role in discussing near-term transportation priorities, tradeoffs, and goals to be achieved for the regional system with limited investment. The revenue forecast is part of Metro’s responsibilities as a metropolitan planning organization and demonstrates the region meeting the necessary federal requirements related to MTIP development.

2024-2027 MTIP Revenue Forecast - Summary

Attachments 1 and 2 provide an overview of the revenue forecast and the process to determine the estimate of transportation revenues anticipated for the region in federal fiscal years 2024 through 2027. The revenue estimates are summarized in total and by each agency with administrative responsibilities of distributing those revenues to transportation projects and programs; Metro, ODOT, SMART, and TriMet. Attachment 1 provides a simplified summary of the revenue forecast for federal fiscal years 2024 through 2027 and outlines a handful of key assumptions and factors that drive the revenue forecast. Attachment 2 provides further detail on revenue forecast, such as the breakdown of forecasted revenues by the source revenue program and by the administering agency’s funding allocation programs. This is done by fiscal year and in summarized totals. In total, the estimated total revenue of known available federal and relevant state funds to date is approximately \$1.9 billion for federal fiscal years 2024-2027.²

It is important to understand the 2024-2027 MTIP forecast remains an estimate of revenues to be available based on several assumptions pertaining to revenue availability. Factors such as the federal surface transportation reauthorization and estimates for state revenues dedicated for transportation (i.e. state gas tax, employer and employee tax for transit) shape the forecast of revenues and ultimately what is distributed to agency funding allocation programs. However, the forecast information helps to gauge the amount of revenue available, establishes an approximate budget, and facilitates an informed discussion around transportation investment priorities and tradeoffs.

Table 1. Summary of Portland Metropolitan Region Federal and State Revenue Forecast, FFY 2024 – 2027, in millions

| 2024 | 2025 | 2026 | 2027 | TOTAL |
|-------------|-------------|-------------|-------------|--------------|
| \$341.48 | \$521.5 | \$523.04 | \$528.77 | \$1,914.87 |

Revenue estimates for the Portland metropolitan region will be further coordinated with partners. Further in the development of the MTIP, as transportation priorities get selected and programmed

² Revenue forecasts are provided for federal fiscal years 2024 through 2027 for Metro, SMART, and TriMet. ODOT did not provide a revenue forecast for federal fiscal year 2024 because revenues were allocated in the 2021-2024 MTIP cycle. ODOT’s forecast represents new estimated revenues for three federal fiscal years.

by project phase (e.g. planning, preliminary engineer/design, right-of-way, and construction) and assigned a funding type (e.g. STBG, HSIP, etc.), the MTIP will reference the early revenue forecast as the starting point for determining reasonably available revenues and demonstration of fiscal constraint - the balancing of project costs with anticipated revenue.

Context for the Revenue Forecast for the 2025-2027 Regional Flexible Fund

The Regional Flexible Fund is one component of the 2024-2027 MTIP revenue forecast. The Regional Flexible Fund forecast accounts for roughly 7.4% of all federal and state generated revenues forecasted to be available to allocate to transportation projects and programs in the Metro region for federal fiscal years 2024 through 2027.

Recognizing the complexity and the many different factors that could impact the amount of funding available for distribution by the 2025-2027 Regional Flexible Fund allocation, Metro MTIP staff created three potential revenue forecasts. These potential revenue forecasts are labelled below as Conservative, Moderate Growth, and Robust to illustrate the most likely range of possible revenue estimates for RFFA funding availability in the region for the years 2025-2027. Further details can be found for each potential revenue forecast below.

Table 1. 2025-2027 Regional Flexible Funds - Conservative Forecast

| | 2024 ³ | 2025 | 2026 | 2027 | Total |
|----------------|-----------------------------|--------------|--------------|--------------|--------------|
| U-STBG | (\$14,386,377) ⁴ | \$29,890,984 | \$30,548,586 | \$31,220,655 | |
| TAP | | \$1,475,218 | \$1,507,672 | \$1,540,841 | |
| CMAQ | | \$13,990,982 | \$14,298,783 | \$14,613,357 | |
| Redistribution | | \$500,000 | \$500,000 | \$500,000 | |
| Total | | | \$45,857,183 | \$46,855,041 | \$47,874,852 |

The Conservative forecast reflects recent 10-year history of a 2.2% annual growth rate for federal STBG, CMAQ, and TAP funds allocated to MPOs in Oregon by statutory or state formulas. The Conservative forecast does not account a potential growth in revenues resulting from the federal transportation reauthorization and only a minor contribution from the new opportunity implemented by ODOT to rewards MPOs with redistribution revenues from meeting obligation targets.

Table 2. 2025-2027 Regional Flexible Funds - Moderate Growth Forecast⁵

| | 2024 ⁶ | 2025 | 2026 | 2027 | Total |
|--------|----------------------------|--------------|--------------|--------------|-------|
| U-STBG | (\$6,266,757) ⁷ | \$31,294,866 | \$31,983,353 | \$32,686,987 | |
| TAP | | \$1,544,504 | \$1,578,483 | \$1,613,209 | |

³ Indicates the estimated carryover and reconciled (i.e. annual actuals to forecasted) revenue of previously allocated Regional Flexible Funds.

⁴ () indicates negative revenues

⁵ The authorization bump reflects the recent Senate Environment and Public Works (EPW) Committee Authorization. Understanding the discussions pertaining to the federal transportation reauthorization remains fluid, the forecast is an estimate based most current information as of May 2021 and the forecast estimate many change due to authorization assumptions. Forecast estimate will be updated as further information about the reauthorization is made available.

⁶ See footnote 3.

⁷ See footnote 4.

| | | | | | |
|----------------|--|--------------|--------------|--------------|----------------------------|
| CMAQ | | \$14,648,092 | \$14,970,350 | \$15,299,698 | |
| Redistribution | | \$1,000,000 | \$1,000,000 | \$1,000,000 | |
| Total | | \$48,487,462 | \$49,532,186 | \$50,599,894 | \$142,352,785 ⁸ |

The Moderate Growth forecast reflects recent 10-year history revenue history with a 7% bump in authorization reflecting the recent Senate Environment and Public Works (EPW) Committee Authorization bill and subsequent 2.2% annual growth and \$1 million per year in redistribution funds.

Table 3. 2025-2027 Regional Flexible Funds - Robust Forecast⁹

| | 2024 ¹⁰ | 2025 | 2026 | 2027 | Total |
|----------------|-----------------------------|--------------|--------------|--------------|-----------------------------|
| U-STBG | | \$31,879,817 | \$32,581,173 | \$33,297,958 | |
| TAP | (\$2,716,916) ¹¹ | \$1,573,373 | \$1,607,987 | \$1,643,363 | |
| CMAQ | | \$14,921,889 | \$15,250,170 | \$15,585,674 | |
| Redistribution | | \$1,500,000 | \$1,500,000 | \$1,500,000 | |
| Total | | \$49,875,078 | \$50,939,330 | \$52,026,995 | \$150,124,487 ¹² |

The Robust reflects the 10-year revenue history with a 9% bump in authorization representing a compromise between the recent EPW Committee Authorization bill and the 2019 House reauthorization legislation with a subsequent 2.2% annual growth rate for these funds and \$1.5 million per year in redistribution funds.

Factors in selecting an appropriate forecast for the allocation of Regional Flexible Funds

In determining an appropriate forecast for the purpose of the allocation of funds in the Regional Flexible Fund process, several factors are considered. They include the following:

- The forecast should allow for the selection of enough projects that provides an adequate pipeline ready to obligate funding as it becomes available each year to achieve the following:
 - deliver project benefits to the region as soon as possible
 - minimize loss of purchasing power to inflation
 - help ODOT (and subsequently the region) be eligible for federal redistribution funds
 - prevent having to undertake any supplemental allocation processes to distribute available funding that is in excess of earlier forecasts
- The forecast should provide a steady flow of funding to projects and programs to avoid shocks to the delivery systems, maximizes efficiencies and effectiveness of those systems.
- The forecast should aim to forecast enough revenues to develop projects in the delivery pipeline to maximize obligation of all funds as they become available but not over forecast

⁸ Total reflects combined revenue for federal fiscal years 2025 through 2027 and overallocated carryover estimated for 2024.

⁹ See footnote 5.

¹⁰ See footnote 3.

¹¹ See footnote 4.

¹² See footnote 8.

so much as to create an over expectation of projects that can be delivered or create excessive conflicts between projects for access to funds as they become available.

- Forecast approaches also have risk management considerations. For example, the risk of having some awarded funding in excess of actual funds available is both manageable and preferable to having to devise a separate process on short notice to quickly award additional funds that become available because of a too conservative forecast. Such a process could not have the rigor or transparency of the existing RFFA process.

As Metro works with the region to allocate the Regional Flexible Funds and move those projects awarded funding through implementation, Metro staff will continue to work with the local lead agencies and ODOT Region 1 staff to determine which projects awarded funding have demonstrated that they are ready to obligate funding for their projects and then program the awarded funding as needed by project phase. Many project phases are likely to be temporarily programmed in the illustrative MTIP years of 2028 or 2029 until the project demonstrates it will be ready to obligate funds in an earlier year. Assuming funding capacity is available, the MTIP will be amended to move projects forward at that time with the objective of utilizing as much funding capacity as possible with projects that are prepared to obligate those funds.

If there happens to be more demand for funds in any single year, priority consideration will be given to projects that can first demonstrate readiness to obligate their funds in that year. For perspective, in the prior 15 years, Metro has never had to delay a project phase to a subsequent fiscal year due to over demand of projects ready to obligate in a current fiscal year.

Any risk of allocating more funding than will actually be available in the 2025-2027 time period is further mitigated by:

- Likelihood of some projects not being ready to obligate funds until 2028 or beyond based on past performance of RFFA selected projects experiencing delays and not being delivered in the prior allocation time frames.
- The ability to work with project delivery agencies to manage their delivery timeframes through the MTIP programming process as further project development and funding availability information develops.
- Any over allocation of 2025-2027 funding authority having to be absorbed by the 2028-30 allocation process funding will have a smaller impact on differences in program and project funding levels, as the RFFA Step 1 High Capacity Transit (HCT) Bond payment commitment will be reduced by approximately \$13 million in the 2028-30 RFFA cycle.

For these reasons, Metro staff plans to move forward with the Moderate Growth forecast for purposes of informing the RFFA Program Direction and allocation process. If significant new developments around revenues occur, such as the adoption of a federal transportation reauthorization bill, the forecast will be updated at that time to reflect best known information.

Administrative Streamlining of Parks Bond Funding

Historically, Regional Flexible Funds have supported the development and construction of multiple multi-use off-street trails projects in the region. In 2019, Metro put forward and voters affirmed their support to build more trails in the region with the passage of the 2019 Parks and Nature bond measure. The bond measure contains funding specific to creating a well-connected network of trails

throughout the region. The 2019 Parks and Nature bond is administered through Metro’s Parks and Nature department.

Recognizing the previous Regional Flexible Fund history of funding trail projects and the administrative burden related to running a deliberative and transparent allocation processes, Metro will pilot a streamlined administrative process to combine the allocation of the 2025-2027 Regional Flexible Funds (RFFA) and the trail-specific funding from the 2019 Parks and Nature (P&N) bond measure. The 2025-2027 RFFA Program Direction will reflect the pilot and will allocate an estimated \$20 million of additional funds for trails available from the P&N bond funds to be allocated through this process.

The main advantages of sharing an application and evaluation process for these funding sources mean that jurisdictional partners can submit one application to be considered for funding from both sources. This reduces workload administrative burden on applicants as well as Metro as the grant provider. Applicants will not need to wait through two processes to know their project’s funding status. And the two funding sources can work together to allow for greater flexibility in how projects are developed and built.

Discussion Questions

1. Does the MTIP revenue forecast provide a useful understanding of transportation funding expected in the region during the 2024-2027 timeframe or are there elements that could be added or better explained?
2. Are there any additional issues or concerns that should be addressed to utilize the “Moderate Growth” forecast for the 2025-2027 RFFA?

Next Steps

The following timeline illustrates the next steps for the 2024-2027 MTIP revenue forecast.

Timeline – 2024-2027 MTIP Revenue Forecast and Allocation of Funding Activities

| Activity | Timeframe |
|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| 2024-2027 MTIP Revenue Forecast | |
| Transit agencies annual budget process | April 2, 2021 |
| ODOT statewide revenue forecast update and allocation to funding programs | February 5, 2021; On-Going |
| TPAC presentation on 2024-2027 MTIP revenue forecast | June 4, 2021 |
| Finalize the 2024-2027 MTIP revenue forecast for allocation purposes | June 2021 |
| Provide JPACT information on 2024-2027 MTIP revenue forecast | June 17, 2021 |
| Allocation Process of Federal Funds | |
| 2025-2027 ODOT funding program allocations (i.e. Enhance, Fix-It, Bicycle-Pedestrian, Safe Routes to School, etc.) | January 2021 – July 2022 |
| 2025-2027 Regional Flexible Funds | July 2021 – October 2022 |
| Transit agencies annual budget process | Annual; spring-summer 2021, 2022, 2023, 2024 |

**Attachment 1 – Summary of Forecast of Federal and State Transportation Revenues
Portland Metro Area Transportation
Federal Fiscal Years 2024 through 2027 (in millions)**

| | FFY 2024 | FFY 2025 | FFY 2026 | FFY 2027 | FYs 2024-27 Total |
|---------------------------------------------------------|-------------------------|----------|----------|----------|----------------------|
| ODOT Directed ¹ | N/A ^{4,7} | \$98.07 | \$98.07 | \$98.07 | \$294.2 |
| ODOT to Cities/Counties ² | N/A ^{4,7} | \$9.42 | \$9.42 | \$9.42 | \$28.28 |
| State Trust Fund to Cities/Counties ⁵ | \$240.36 | \$249.66 | \$248.83 | \$248.00 | \$986.85 |
| Metro MPO ^{1,3} | (\$6.27) ^{4,8} | \$48.5 | \$49.5 | \$50.6 | \$142.4 ⁶ |
| SMART | \$2.59 | \$2.65 | \$2.72 | \$2.78 | \$10.74 |
| TriMet | \$104.8 | \$113.2 | \$114.5 | \$119.9 | \$452.4 |
| Total | \$341.48 | \$521.5 | \$523.04 | \$528.77 | \$1,914.87 |

¹ Does not included federally dedicated planning funds or funds dedicated to ODOT Administrative costs.

² Directed funding program pass through to local agencies; does not include pass through to MPOs or State Trust Fund pass through to local agencies.

³ Utilizes MPO forecast method that anticipates growth in available funding rather than ODOT forecast method of 10% reduction of current fund levels.

⁴ Metro and ODOT forecasted revenues for FFY 2024 have already been allocated. SMART and TriMet forecasted revenues will be allocated on an annual basis through their budget processes.

⁵ Funds not typically reflected in the Metropolitan Transportation Improvement Program, unless funds are being used for capital projects deemed as regionally significant.

⁶ Total reflects combined revenue for federal fiscal years 2025 through 2027 and overallocated carryover estimated for 2024.

⁷ Estimates for carryover revenues for FFY 2024 for ODOT funding programs are unavailable for the revenue forecast. Carryover estimates will be made available and used as part of revenue estimates for fiscally constraining the MTIP and the STIP.

⁸ () indicates negative. Overallocated funds for FFY 2024.

Summary

- Estimated \$1.91 billion will be invested into transportation projects and programs in the Portland metropolitan region in federal fiscal years 2024 through 2027.
- While federal transportation revenues are an important source for funding transportation projects and programs, state and local revenue sources comprise of a larger and more significant source of investment into the transportation system.¹

¹ Consistent with findings on national research on surface transportation funding and financing.

Key Assumptions

- All revenue forecasts use historical financial data and information from the existing/current federal surface transportation funding levels as starting points for projecting revenue forecasts.
- ODOT revenue forecast for federal fiscal years 2025-2027 assumes a ten percent (10%) reduction in transportation funding being available to allocate to transportation projects and programs. ODOT has stated the 10% reduction assumption roughly translates to \$200 million (out of \$2.1 to \$2.2 billion) not included for allocation purposes in the statewide totals.
- Transit agency revenue forecast does not include local revenues generated for the purpose of service and transit agency operations, such as passenger fares, advertising revenue, or employer tax.
- Revenue forecast estimate does not include local revenues generated by cities and counties, such as a local gas taxes, parking revenues, system development charges, or other user fees, used by local jurisdictions for operations, maintenance, or capital projects.
- Revenue forecast does not include any potential federal discretionary grants the Portland region may receive for major capital projects, which the region historically has been successful in receiving. Examples include FTA Capital Investment Grants (i.e. New Starts, Small Starts), TIGER/BUILD/RAISE grants, or FHWA grant programs (i.e. INFRA).

ATTACHMENT 2 – 2024-2027 MTIP Revenue Forecast

Introduction

This report documents the cooperative development of the revenue forecast for the 2024-2027 Metropolitan Transportation Improvement Program (MTIP). It includes a description of the forecast methods and the process by which forecasted revenues were distributed to funding allocation programs administered by the four agencies within the greater Portland metropolitan area, Oregon Department of Transportation (ODOT), Metro, TriMet and the South Metro Area Region Transportation (SMART), that select transportation projects and programs to receive those funds.

The revenue forecast is only for transportation funding that will be programmed in the MTIP, which includes all federal transportation funds and state and local agency funds that will be used on “regionally significant” projects. Generally, regionally significant projects are those that are located on the regional transportation system as defined in the Metro area Regional Transportation Plan. Therefore, state and local agency funds that will be used to build projects and maintain the local street system are not included in the forecast.

In developing the revenue forecast for the 2024-2027 MTIP, each agency which carries a responsibility to administer federal transportation funding, summarizes the methodology for determining the estimated amount of revenue available for transportation projects and programs in federal fiscal years 2024 through 2027 and the process for determining how to allocate the funds. The revenue process does not discuss the allocation of the revenues to transportation projects and programs. Separate documentation is provided about the allocation process, project prioritization criteria, and allocation results.

Recognizing Metro and ODOT use three-year cycles for allocating transportation revenues to projects and programs, the revenue forecast for Metro and ODOT focuses on new revenues available for federal fiscal years 2025, 2026, and 2027. Metro also provides an estimate of unallocated carryover revenues anticipated for fiscal year 2024. These unallocated revenues represents a more refined estimate of the anticipated federal revenues available, but had not previously been allocated to transportation projects and programs in the 2021-2024 MTIP. The transit agencies, SMART and TriMet, include estimates for each federal fiscal year (2024-2027) as both agencies conduct their programming of projects annually through their budget process.

In developing the revenue forecast for the 2024-2027 MTIP, Metro led the coordination efforts by working with partners ODOT, SMART, and TriMet. Metro provided a template outlining a series of steps in describing the development of the revenue estimates. The template was developed in a manner which would be flexible to each agency and respecting the agency’s revenue forecasting processes, while also making the progression towards identifying the estimated revenues in the Portland metropolitan region. Key aspects each partner was expected to address as part of the revenue forecast included baseline starting points for revenue estimates, assumptions related to the availability of revenues, and revenue growth

rates. Metro coordinated meetings with partner agency staff to review report drafts and forecast methods in preparation to produce this snapshot forecast of anticipated revenues to be invested in the region’s transportation system in federal fiscal years 2024 through 2027.

Table 1
Forecast of Federal and State Generated Transportation Revenues
Metro Area Transportation
Federal Fiscal Years 2024 through 2027 (in millions)

| | FFY 2024 | FFY 2025 | FFY 2026 | FFY 2027 | FYs 2024-27 Total |
|-------------------------------------------------------------|-------------------------|----------|----------|----------|----------------------|
| ODOT Directed ¹ | N/A ^{4,7} | \$98.07 | \$98.07 | \$98.07 | \$294.2 |
| ODOT to Cities/Counties ² | N/A ^{4,7} | \$9.42 | \$9.42 | \$9.42 | \$28.28 |
| State Trust Fund to Cities/Counties ⁵ | \$240.36 | \$249.66 | \$248.83 | \$248.00 | \$986.85 |
| Metro MPO ^{1,3} | (\$6.27) ^{4,8} | \$48.5 | \$49.5 | \$50.6 | \$142.4 ⁶ |
| SMART | \$2.59 | \$2.65 | \$2.72 | \$2.78 | \$10.74 |
| TriMet | \$104.8 | \$113.2 | \$114.5 | \$119.9 | \$452.4 |
| Total | \$341.48 | \$521.5 | \$523.04 | \$528.77 | \$1,914.87 |

¹ Does not included federally dedicated planning funds or funds dedicated to ODOT Administrative costs.

² Directed funding program pass through to local agencies; does not include pass through to MPOs or State Trust Fund pass through to local agencies.

³ Utilizes MPO forecast method that anticipates growth in available funding rather than ODOT forecast method of 10% reduction of current fund levels.

⁴ Metro and ODOT forecasted revenues for FFY 2024 have already been allocated. SMART and TriMet forecasted revenues will be allocated on an annual basis through their budget processes.

⁵ Funds not typically reflected in the Metropolitan Transportation Improvement Program, unless funds are being used for capital projects deemed as regionally significant.

⁶ Total reflects combined revenue for federal fiscal years 2025 through 2027 and overallocated carryover estimated for 2024. See Table 2 for further detail.

⁷ Estimates for carryover revenues for FFY 2024 for ODOT funding programs are unavailable for the revenue forecast. Carryover estimates will be made available and used as part of revenue estimates for fiscally constraining the MTIP and the STIP.

⁸ () indicates negative. Overallocated funds for FFY 2024.

2024-2027 MTIP Revenue Forecast

Metro Regional Flexible Funds (RFF) Revenue Forecast

Metro's Regional Flexible Fund Allocation (RFFA) is a process that consolidates the distribution of three federal funding program sources to transportation projects and programs in the Metro region. The revenue forecast for the Regional Flexible Funds is coordinated with the Oregon Department of Transportation and Oregon's other Metropolitan Planning Organizations (MPOs).

Step 1: Developing the Statewide Metropolitan Area/Transportation Management Areas (TMA) Revenues Forecast (September 2020 – April 2021)

Federal Transportation Funding

The federal government provides revenues from federal fuels taxes and heavy truck taxes to states and local governments. Most federal funding is distributed to states, metropolitan planning organizations, and local governments by funding formulas, with the remainder allocated in competitive application-based programs.

Oregon receives about half a billion dollars in funding from the Federal Highway Administration each year. All federal highway funds flow through ODOT from individual federal funding programs that each have their own rules regarding what types of projects are eligible for those funds and what match rates are required.

About 30 percent of those funds are distributed to local governments either directly by formula (e.g. urban-STBG program funds) or by ODOT (e.g. the sub-allocation of CMAQ funds to MPOs that have had federal air quality compliance issues and implementation plans to address them).

Developing Statewide Forecasts

The statewide forecast of federal funds available for transportation projects and programs during the time period of the 2024-2027 State and Metropolitan Transportation Improvement Programs (TIPs) is coordinated by the Statewide Investment Management Section of the ODOT. The forecast is shared with MPOs and Transit agencies in the state through the statewide TIP committee.

Metro staff works with ODOT staff and other Oregon MPOs in the transportation improvement program (TIP) coordination committee to coordinate forecast methodology options for the federal funding programs provided to the Oregon TMA MPOs: Surface Transportation Block Grant (STBG) – including the Transportation Alternatives (TA) Program set-aside, and the Congestion Mitigation – Air Quality (CMAQ) funding program). The TMA MPOs in Oregon are apportioned allocation authority over the following federal transportation funding programs:

Surface Transportation Block Grant (Urban): The Surface Transportation Block Grant (STBG) Program provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid

highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.

Congestion Mitigation and Air Quality (CMAQ): The Congestion Mitigation and Air Quality program provides a funding source to State and local governments for certain eligible transportation projects and programs to help meet the requirements of the Clean Air Act and local State Implementation Plans (SIPs). Funding is available to areas that do not meet the National Ambient Air Quality Standards for ozone, carbon monoxide, or particulate matter (referred to as nonattainment areas) and for former nonattainment areas. The goals of the program are to mitigate for congestion and improve air quality by reducing transportation emissions. The scope of a transportation project or program must fit within one or more of the identified project types which are recognized eligible by federal requirements of the program as well as any additional state requirements. The Oregon Transportation Commission has adopted additional state priorities and program guidance for use of CMAQ funds in Oregon.

Transportation Alternatives (set-aside from Surface Transportation Block Grant): The FAST Act eliminated the MAP-21 Transportation Alternatives Program (TAP) and replaced it with a set-aside of Surface Transportation Block Grant (STBG) program funding for transportation alternatives (TA). These set-aside funds are flexible to include all projects and activities that were previously eligible under the old TAP funding program. This encompasses a variety of smaller-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to storm water and habitat connectivity.

The TIP coordinators committee was provided historical data of revenues for each MPO for use in developing the revenue forecast for their MPO. The TIP coordinators committee and ODOT staff did not require MPOs to apply a specific revenue forecasting methodology, leaving the discretion that seemed most appropriate to each MPO. Each MPO decides the way in which to forecast funding for the purpose of allocating forecasted funding to projects. However, for TIP programming, the MPOs are limited in how much funding they can program to project costs in each fiscal year by the amount of committed or reasonably expected revenue to projects within each MPO. Methods for determining committed and reasonably expected revenue for financially constraining the TIP will continue to be coordinated with the statewide committee.¹

¹ While the TIP coordinators committee and ODOT do not specify a particular forecast of revenues for the purpose of allocating funding to projects, the TIP coordinators committee and ODOT will continue to meet throughout the development of the 2024-2027 MTIPs and STIP to coordinate the revenue forecast which will be used to financially constrain the MTIPs and STIP. The initial financial constraint forecast for the 2024-27 TIP financial constraint purposes is expected to take place in autumn/winter 2022-2023 with updated financial information. Revenue information used to financially constrain the TIP to committed and reasonably available funding is continually updated through the life of the TIP to reflect most up to date revenue data. When the TIP is adopted or amended, financial constraint utilizing the most current revenue and project cost data is utilized.

Step 2: Forecasting the Revenue Allocation Authority to Metro and the Regional Flexible Funds (September 2020 – May 2021)

While the work of the TIP committee significantly influences the revenue forecast of MPOs throughout Oregon, the Portland metropolitan region also considers and emphasizes several other factors in developing an appropriate method for forecasting available funding for the allocation of Regional Flexible Funds. These factors include: 1) consideration of federal processes which determine the amount of federal transportation funds distributed to states and MPOs for transportation projects; 2) project readiness and delivery considerations and the federal aid process; 3) management of obligating federal funds in a timely manner; and 4) administration considerations of the RFFA allocation process.

The first factor is the federal process that makes funds available for projects and highly influences the revenue forecast. Every five to six years, federal authorization legislation is passed that sets the budget authority for federal transportation funding, including RFFA funds. After authorization, each year funds are apportioned based on actual transportation revenues generated, up to the amounts previously authorized. In recent history, apportionment of funds typically generates about 92-95% of authorized amounts. The percent of apportionment to authorization is known as the limitation rate.

Surface Transportation Block Grant (STBG) funds are allocated to Transportation Management Area (TMA) metropolitan planning organizations (MPOs) based on formulas outlined by federal statutes. Metro receives approximately 75% of STBG funding made available to large MPOs in Oregon. In addition to federal formula allocation of STBG, Oregon also receives a state allocation of Congestion Mitigation and Air Quality (CMAQ) funds based on the U.S. Environmental Protection Agency (EPA) air quality designations. Oregon employs a statewide formula allocation for CMAQ funding to the eligible areas. The CMAQ statewide formula allocation was last updated in 2017 and the allocation applies to CMAQ funds through 2024. While the update to the statewide CMAQ funding is expected to take place during the development of the 2024-2027 MTIP, the revenue forecast utilizes a continuation of the current statewide CMAQ sub-allocation formula. Metro as the largest eligible MPO to receive CMAQ funds, receives approximately 73% of the CMAQ funds available to Oregon MPO areas.

The second factor is the potential readiness for the use of forecasted funds and the needs of the local project delivery process of federal transportation funds. Upon award of funds, a local agency coordinates with ODOT and Metro to define a detailed scope of work, budget and schedule that address state and federal requirements (e.g. National Environmental Protection Act (NEPA) process requirements, design requirements) and execute an intergovernmental agreement to document how the project will meet requirements and provide required match funding. The process of executing the agreement typically takes a year or longer. Implementing the agreement through the project phases of planning, preliminary engineering, right of way acquisition, and construction can take up to an additional 4 to 5 years. Recognizing the federal aid process and potential readiness of a transportation project awarded funding can impact the amount of forecasted revenues available year-by-year, the history of readiness of previous

projects and complexity of federal aid processes influences whether to take a conservative or aggressive approach to the revenue forecast for allocation purposes.

The third factor is the ODOT and MPO partnership on fund management of federal transportation funds. Each state must contractually obligate all federal transportation funding apportioned to it each federal fiscal year or the unobligated funds will be redistributed to states that have obligated all their funds. As ODOT has a better capability to obligate federal transportation funds quickly on projects or programs, the agency takes on the responsibility to ensure all federal transportation funding authority is obligated, including unobligated MPO funding authority. When ODOT obligates MPO unobligated funding authority, ODOT then provides equivalent funding authority in a future year. This provides flexibility to MPOs and keeps ODOT eligible for redistribution funds from other state's unobligated funding authority. ODOT and the large MPOs have recently entered an agreement for MPOs to meet obligation rates in exchange for the ability to share in a portion of the redistribution funds ODOT receives annually. The management and obligation of federal transportation funds allocated by MPOs opens a new opportunity for potential increased revenue available to include as part of the forecast.

The fourth and last additional factor is the administrative consideration and impact of the 3-year allocation cycle. Through the RFFA process, Metro undertakes a significant administrative effort to run a deliberative and transparent funding allocation process based on the policy objectives and strategy for implementing the region's long-range transportation plan. This process is designed as a thoughtful effort of weighing tradeoffs and advancing progress towards the region's goals for the transportation system. As a result, the RFFA process is not nimble and does not adapt well to allocate additional revenues. Therefore, the forecast of revenues for the Portland region must factor in consideration of the allocation process which cannot quickly allocate unanticipated revenues.

In summary, forecasting and estimating the revenue for the Regional Flexible Funds allocation process has additional unique objectives from other funding allocation programs in the 2024-2027 MTIP and their forecasts of available funds.

With these factors in mind, the goals of estimating the revenue allocation authority are created to achieve the following objectives:

- Select enough projects that prepares an adequate pipeline to be ready to obligate funding as it becomes available each year to achieve the following:
 - deliver project benefits to the region as soon as possible
 - minimize loss of purchasing power to inflation
 - help ODOT (and subsequently the region) be eligible for federal redistribution funds
 - prevent having to undertake any supplemental allocation processes to distribute available funding that is in excess of earlier forecasts
- Provide a steady flow of funding to projects and programs to avoid shocks to the delivery systems.

- Balance forecasting enough revenues to develop projects in the delivery pipeline to maximize obligation of all funds as they become available without creating an over expectation of projects that can be delivered or excessive conflicts between projects for access to funds as they become available.

Revenue Forecast Methods and Assumptions

In prior RFFA cycles, forecast amounts would be based on funding authorization levels, with an assumed limitation rate based on historic performance. If the allocation cycle extended beyond the authorization period, a growth factor, based on historic performance and factoring in the limitation rate from the last year of authorization, was applied to the final authorization year and extended out to the final year of the RFFA cycle

In this RFFA cycle, the region is five (5) years removed from the current federal transportation authorization bill which expires in September 2021. However, historically each federal transportation reauthorization has resulted in an increase in federal transportation revenues, though varied in the level of increase. Current discussions of the federal transportation reauthorization suggest the historical trend likely to continue with legislation to replace the current authorization bill, commonly known as Fixing America’s Surface Transportation (FAST) Act.

Additionally, the region is now eligible to receive federal redistribution funds if they become available and the region meets its obligation targets. This means the range of actual revenues and funding availability are increased and the region needs to utilize additional fund forecast and administrative tools to manage this situation to best achieve the forecast and allocation objectives as described above.

With the forecasting factors and goals described above, and based on the historical performance of federal transportation revenues provided to the Metro MPO, the proposed revenue forecast for the 2025-2027 Regional Flexible Fund is outlined below.

Table 2. 2025-2027 Regional Flexible Funds – Moderate Growth Forecast²

| | 2024 ³ | 2025 | 2026 | 2027 | Total |
|----------------|----------------------------|--------------|--------------|--------------|-------|
| U-STBG | (\$6,266,757) ⁴ | \$31,294,866 | \$31,983,353 | \$32,686,987 | |
| TAP | | \$1,544,504 | \$1,578,483 | \$1,613,209 | |
| CMAQ | | \$14,648,092 | \$14,970,350 | \$15,299,698 | |
| Redistribution | | \$1,000,000 | \$1,000,000 | \$1,000,000 | |

² The authorization bump reflects the recent Senate Environment and Public Works (EPW) Committee Authorization. Understanding the discussions pertaining to the federal transportation reauthorization remains fluid, the forecast is an estimate based most current information as of May 2021 and the forecast estimate may change due to authorization assumptions. Forecast estimate will be updated as further information about the reauthorization is made available.

³ Indicates the estimated carryover and reconciled (i.e. annual actuals to forecasted) revenue of previously allocated Regional Flexible Funds.

⁴ () indicates negative revenues

| | | | | | |
|-------|--|--------------|--------------|--------------|----------------------------|
| Total | | \$48,487,462 | \$49,532,186 | \$50,599,894 | \$142,352,785 ⁵ |
|-------|--|--------------|--------------|--------------|----------------------------|

To Moderate Growth forecast reflects the amount of funds that would come to region through the federal formula funding programs based on the Senate Environment and Public Works (EPW) Committee Authorization bill amounts and a moderate a share of federal redistribution funds based on the region meeting its obligation targets as agreed to with ODOT. To forecast how the federal formula funds in the authorization bill would flow to the region by each year, the forecast provides an initial increase of 7% in the first year of authorization (FY 2022) and a 2.2% increase in each subsequent year to reflect typical growth of funds through the period of the authorization bill.

The reflected revenue forecast for the 2025-2027 RFFA will guide the deliberation and selection of transportation projects and programs to support the Portland region’s effort to implement the long-range transportation plan. However, the revenue forecast provided is for allocation purposes and is intended as a snapshot of estimated revenues as of Spring/early Summer 2021. Metro staff will continue to collaborate with ODOT and the other Oregon MPOs on the methods to determine the funding authority and develop refined revenue estimates that will be utilized in each of the federal fiscal years of 2024 through 2027 for the purpose of establishing fiscal constraint. The funding authority determined in this process will be used in the MTIP programming process to limit the amount of funds that can be utilized by projects in each fiscal year of the 2024-27 MTIP. The MTIP programming is scheduled to be adopted in the summer of 2023 and is subsequently amended on a regular basis to reflect project cost and schedule adjustments and updated revenue amounts.

Step 3: Defining the Regional Flexible Fund Program Direction and Distributing Revenues to Programs (February 2021 – July 2021)

The 2025-2027 RFFA began in February 2021 at the regular meeting of TPAC. At that meeting a 20-month timeline and process was outlined for the kick-off of the Regional Flexible Fund Allocation. The allocation is split into two processes: the first focuses on defining and refining the program direction for the funding allocation and the second focuses on the competitive capital grant process.

The 2018 Regional Transportation Plan (RTP) policy objectives continue to guide the investment priorities for the RFFA. Those objectives are equity, safety, climate and congestion. The RTP directs that further policy, planning and funding outcomes should advance the region toward its goals in these four areas.

JPACT and Metro Council in further program direction discussions reaffirmed the same two-step process used to award funding since the 2012-2013 RFFA cycle:

- Step 1 continues the region’s commitment to repayment of bonds used to develop and construct high-capacity transit and active transportation projects. It also continues

⁵ Total reflects combined revenue for federal fiscal years 2025 through 2027 and unallocated carryover estimated for 2024.

investments in region-wide programs to fund system and demand management activities and to invest in transit-oriented development projects near high-capacity transit lines. The region-wide programs are long-standing regional programs which have been established to meet various regional commitments, such as air quality and the Climate Smart Strategy.

- Step 2 focused funding on capital projects. Eligible applicants include agencies capable of entering an inter-governmental agreement with ODOT for funding and administering a federal aid transportation project; cities and counties, park districts, regional and state agencies.

Direction on the distribution of revenues to Step 1 programs and Step 2 project allocations will be provided as a part of the 2025-2027 RFFA Program Direction documentation scheduled for JPACT and Metro Council action in July 2021. Final project and program allocations is scheduled for adoption in autumn 2022 for incorporation into the 2024-27 MTIP and STIP.

Throughout the program direction and RFFA process, Metro staff will also work with the local lead agencies and ODOT Region 1 staff to determine which projects awarded funding have demonstrated that they are ready to obligate funding for their projects and then program the awarded funding as needed by project phase. Many project phases are likely to be temporarily programmed in the illustrative MTIP years of 2028 or 2029 until the project demonstrates it will be ready to obligate funds in an earlier year. Assuming funding capacity is available, the MTIP will be amended to move projects forward at that time with the objective of utilizing as much funding capacity as possible with projects that are prepared to obligate those funds.

Administrative Streamlining of Parks Bond Funding

Historically, millions of Regional Flexible Funds have supported the development and construction of multiple multi-use off-street trails projects in the region. In 2019, Metro put forward and voters affirmed their support to build more trails in the region with the passage of the 2019 Parks and Nature bond measure. The bond measure, paid for by a tax assessed on property, contains funding specific to support trails projects and continuing to create a well-connected network of trails throughout the region. The 2019 Parks and Nature bond is administered through Metro's Parks and Nature department.

Recognizing the previous Regional Flexible Fund history funding trail projects, overall increase in available funding for trails, and the administrative burden related to running a deliberative and transparent allocation process, Metro will pilot a streamlined administrative process to combine the allocation of the 2025-2027 Regional Flexible Funds (RFFA) and the trail-specific funding from the 2019 Parks and Nature (P&N) bond measure. The 2025-2027 RFFA Program Direction will acknowledge the pilot and describe the coordination of RFFA and an estimated \$20 million of additional funds for trails available from the P&N bond funds.⁶

⁶ Because the 2019 Park Bond funding for trail projects is an administrative pilot, the revenues were not formally included as part of the 2025-2027 RFFA revenue forecast options and it is not included in the overarching 2025-2027 MTIP revenue forecast.

Step 4: On-Going Management of Forecast Amount and Programming of Project Costs

Management of the revenue forecast of expected available Regional Flexible Funds is on-going as federal and state actions will impact the amount of revenues ultimately made available for reimbursement of project costs awarded funding. As these funds are made available each federal fiscal year, final decisions on how much funding is made available to a particular project phase is documented in the MTIP Programming tables. Programming is the balancing and assignment of available revenues for costs incurred by an eligible project.

How Metro staff recommend final programming of funds to project costs is directed by the awarded amount of funding to projects and programs by JPACT and Metro Council, the progress of the lead agency to complete steps to ensure a project is ready and eligible to receive the funds, and state and federal rules regarding TIP programming.

In modern program history, there has not been an occasion where projects that have been awarded funding by JPACT and Metro Council have been ready and requested more RFFA funding than has been available in a particular fiscal year. Should that occur in the future and Metro staff is unable to work out an acceptable solution with the lead agencies involved, Metro staff would provide a recommendation to JPACT and the Metro Council on resolution of such issue, if time allowed. A typical solution would be to delay one or more project phases eligibility to seek project cost reimbursement to the beginning of the subsequent fiscal year when additional funding becomes available. Programming of project costs and funding in subsequent years would potentially need to be adjusted to accommodate this shift.

In actively managing revenue forecasts, the following items are monitored and as activity occurs, used to manage the programming of funds in each year of the RFFA process and to determine a forecasted carryover (or deficit) amount into the subsequent RFFA process.

2024-2027 MTIP Revenue Forecast

Oregon Department of Transportation (ODOT) Revenue Forecast

The revenue forecast for state transportation funding is completed in four phases: Statewide total revenues forecast (August – September 2020), Distribution of revenues to Categorical Policy Areas (October 2020 – January 2021), Categorical Policy Area sub-allocation distribution of revenues (January – March 2021), Estimates of Funding Allocation Program revenues by ODOT Region and MPO Areas.

Step 1: Statewide total revenues forecast (August – September 2020)

The statewide forecast of funds available for transportation projects and programs during the time period of the 2024-27 State and Metropolitan Transportation Improvement Programs (TIP) is led by the state Finance and Budget Divisions, Statewide Investments Section of the ODOT. The forecast is shared with MPOs and Transit agencies in the state through the statewide TIP committee.

The forecast of funding is dependent on a federal authorization bill being in place or not in place. With an active federal authorization bill, the forecast will include what is in the bill. When no federal authorization bill is in place, the state assumes a 10% reduction from current year levels to federal funding across all funding program types for all TIP years. Funding allocated to the MPOs (STBG and TAP) have their own forecast methodology described in the Metro MPO forecast section.

Federal Transportation Funding

The federal government provides revenues from federal fuels taxes and heavy truck taxes to states and local governments. Most federal funding is distributed to states and local governments by funding formulas, with the remainder allocated in competitive application-based programs. The current federal transportation authorization which dictates the distribution of federal funding to states is Fixing America's Surface Transportation (FAST) Act.

Oregon receives about half a billion dollars in funding from the Federal Highway Administration each year for construction projects on the state's roads, including the interstate, as well as planning and engineering. Some funds can also be used for transit and bicycle/pedestrian capital projects. All federal highway funds flow through ODOT from individual federal funding programs that each have their own rules regarding what types of projects are eligible for those funds and what match rates are required. About 30 percent of those funds are distributed to local governments either directly by formula (e.g. urban-STBG program funds) or awarded through competitive application processes (e.g. HSIP program funds through the state ARTS allocation process). Oregon also receives public transportation funding from the Federal Transit Administration. These FTA funds are primarily used to support public transportation operated/contracted by ODOT or passed through to public transportation operators in small

urban and rural areas. FTA works directly with transit agencies in large urban areas to provide funding for operations and projects. Table X provides a short description of the various federal funding programs which contribute to the ODOT statewide revenue forecast.

Table 3. Federal Revenue Funding Programs Description

| Common Federal Revenue Funding Programs | |
|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund | Description |
| Surface Transportation Program (STBG) Funds – State allocation (includes STBG-TAP set-aside for state) (Formula) | The FAST Act converts the long-standing Surface Transportation Program into the Surface Transportation Block Grant Program acknowledging that this program has the most flexible eligibilities among all Federal-aid highway programs and aligning the program’s name with how FHWA has historically administered it. [FAST Act § 1109(a)]. The STBG promotes flexibility in State and local transportation decisions and provides flexible funding to best address State and local transportation needs. |
| Highway Safety Improvement Program (HSIP) (Formula) | The FAST Act continues the Highway Safety Improvement Program (HSIP) to achieve a significant reduction in traffic fatalities and serious injuries on all public roads, including non-State-owned public roads and roads on tribal lands. The HSIP requires a data-driven, strategic approach to improving highway safety on all public roads that focuses on performance. |
| Rail-Highways Crossings (Sec. 130) (Formula) | The FAST Act continues the Railway-Highway Crossings program, which provides funds for safety improvements to reduce the number of fatalities, injuries, and crashes at public railway-highway grade crossings. |
| National Highway Freight Program (Formula) | The FAST Act establishes a new National Highway Freight Program to improve the efficient movement of freight on the National Highway Freight Network (NHFN) and support several freight related infrastructure improvement goals. |
| Congestion Mitigation Air Quality (CMAQ) Improvement Funds (Formula) | The FAST Act continues the CMAQ program to provide a flexible funding source to State and local governments for transportation projects and programs to help meet the requirements of the Clean Air Act. Funding is available to reduce congestion and improve air quality for areas that do not meet the National Ambient Air Quality Standards for ozone, carbon monoxide, or particulate matter (nonattainment areas) and for former nonattainment areas that are now in compliance. |
| National Highway | The FAST Act continues National Highway Performance Program which provides support for the condition and performance of the National Highway System (NHS), for the construction of new facilities on the NHS, and to ensure |

| Common Federal Revenue Funding Programs | |
|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund | Description |
| Performance Program (Formula) | that investments of Federal-aid funds in highway construction are directed to support progress toward the achievement of performance targets established in a State's asset management plan for the NHS. |
| Less Common Federal Revenue Funding Programs⁷ | |
| Fund | Description |
| Emergency Relief | The FAST Act continues the Emergency Relief program, which provides funds for emergency repairs and permanent repairs on Federal-aid highways and roads, tribal transportation facilities, and roads on Federal lands that the Secretary finds have suffered serious damage as a result of natural disasters or catastrophic failure from an external cause. |
| Federal Lands Access Program | Provides funds for projects on Federal Lands Access Transportation Facilities that are located on or adjacent to, or that provide access to Federal lands. Funding program is a competitive grant program. |
| State Recreational Trails Program | The FAST Act eliminates the MAP-21 State Recreational Trails Program and replaces it with an optional set-aside of Surface Transportation Block Grant (STBG) program funding for Recreational Trails Program. Set aside amount is equal to the State portion of the Transportation Alternatives program. Program is at the discretion of the Governor to decide whether to continue State Recreational Trails Program. |
| Discretionary Federal Revenue Funding Programs | |
| Fund | Description |
| Federal Miscellaneous (Discretionary grants e.g. TIGER, RAISE, NHFP – Discretionary, FAST Lane, INFRA, ITS, etc.) | Competitive discretionary grant programs with specific criteria for application and project eligibility. Discretionary grant programs cycles are driven by federal annual budget and transportation reauthorization. Funds from these discretionary programs are not guaranteed. |
| Rural Area Specific Federal Revenue Funding Programs | |
| Fund | Description |
| Clackamas County Surface Transportation Block Grant (STBG) Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT to Clackamas County. |

⁷ Not an exhaustive list of federal revenue programs.

| Common Federal Revenue Funding Programs | |
|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund | Description |
| Multnomah County Surface Transportation Block Grant (STBG) Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT to Multnomah County. |
| Washington County Surface Transportation Block Grant (STBG) Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT to Washington County. |
| Planning Specific Federal Revenue Funding Programs | |
| Fund | Description |
| Metropolitan Planning (PL) Formula | The FAST Act continues the Metropolitan Planning program. The Program establishes a cooperative, continuous, and comprehensive framework for transportation planning and making transportation investment decisions in metropolitan areas. Program oversight is a joint Federal Highway Administration/Federal Transit Administration responsibility. |
| Statewide and Non Metropolitan Planning (SPR) (FHWA/FTA) Formula | The FAST Act continues the statewide and nonmetropolitan planning process, which establishes a cooperative, continuous, and comprehensive framework for making transportation investment decisions throughout the State. Oversight of this process is a joint responsibility of the Federal Highway Administration and the Federal Transit Administration. |
| MPO Specific Federal Revenue Programs (Sub-Allocations from Formula Funds above) | |
| Fund | Description |
| Surface Transportation Program (STBG) Funds – Urban | The Surface Transportation Block Grant (STBG) Program provides flexible funding that may be used by metropolitan planning organizations, and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals. |
| Transportation Alternatives - Urban | The FAST Act eliminates the MAP-21 Transportation Alternatives Program (TAP) and replaces it with a set-aside of Surface Transportation Block Grant (STBG) program funding for transportation alternatives (TA). These set-aside funds include all projects and activities that were previously eligible under TAP, encompassing a variety of smaller-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and |

| Common Federal Revenue Funding Programs | |
|-----------------------------------------|------------------------------------------------------------------------------------------------------|
| Fund | Description |
| | vegetation management, and environmental mitigation related to storm water and habitat connectivity. |

In addition to federal revenue funding programs, Oregon raises revenues for transportation infrastructure, maintenance, operations, and other related activities. Managed and administered by ODOT, the state revenues are generated from a variety of sources, including taxes on the sale of gasoline, vehicle registration fees, and weight-mile fees on trucks. Table X provides a short description of the state revenue funding programs.

Table 4. State Revenue Funding Programs Descriptions

| State Revenue Funding Programs | |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund | Description |
| State Highway Trust Fund | <p>Oregon’s State Highway Trust Fund collects resources from three main sources:</p> <ul style="list-style-type: none"> • Taxes on motor fuels, including gas tax and diesel tax. • Taxes on heavy trucks, including the weight mile tax and truck registrations. • Driver and vehicle fees, including licenses and vehicle title and registration. <p>Under the Oregon Constitution, State Highway Fund fees and taxes must be spent on roads, including bikeways and walkways within the highway right of way. State funds can be used for both construction projects and the day-to-day maintenance and operations of the state’s roads. Formulas set in state statute distribute about 40 percent of State Highway Fund revenues (after deducting the costs of collecting the revenue) to cities and counties.</p> |
| House Bill (HB) 2017 | <p>House Bill 2017 Transportation Funding Package passed by the 2017 Oregon Legislature created a number of new revenue sources for transportation.</p> <ul style="list-style-type: none"> • A 0.5 percent vehicle dealer privilege tax on new car sales to fund rebates for electric vehicles and provide ongoing funding for the multimodal Connect Oregon program. • A 0.1 percent employee payroll tax (\$1 for \$1,000 in payroll) to improve public transportation service in both rural and urban communities. • A \$15 tax on the sale of new bicycles with tires over 26 inches and cost at least \$200 will go to Connect Oregon for off-road bicycle and pedestrian paths that serve commuters. |
| Other State Funds | <p>ODOT also receives revenue from several other state sources, including:</p> <ul style="list-style-type: none"> • Lottery funds, including lottery bond proceeds directed to the Connect Oregon program. • Cigarette tax revenues dedicated to transit services for seniors and disabled people. • Custom license plate fees, dedicated to operating passenger rail. |

- General fund resources for senior and disabled transit and passenger rail service.
- A variety of transportation-related permits and fees.

The combined estimated federal and state revenues available statewide for transportation is approximately \$2.2 billion dollars for federal fiscal years 2025 through 2027. A summary of estimated revenues by year is provided in Table 5.

Table 5. ODOT Revenue Forecast - Unallocated STIP Revenue, Federal Fiscal Years 2025- 2027 (All revenues are in millions)

| Program Type | 2025 | 2026 | 2027 | Total |
|-------------------------------------------------|--------------|--------------|--------------|----------------|
| <u>Federal</u> | | | | |
| National Highway Performance Program (NHPP) | 274.6 | 274.6 | 274.6 | 823.8 |
| Surface Transportation Block Grant (STBG) | 137.3 | 137.3 | 137.3 | 411.9 |
| Highway Safety Improvement Program (HSIP) | 27.2 | 27.2 | 27.2 | 81.6 |
| Rail | 2.9 | 2.9 | 2.9 | 8.7 |
| Congestion Mitigation Air Quality Planning (PL) | 18.1 | 18.1 | 18.1 | 54.3 |
| National Highway Freight Program (NHFP) | 3.4 | 3.4 | 3.4 | 10.2 |
| | 16.5 | 16.5 | 16.5 | 49.5 |
| FHWA Apportionment | 480.0 | 480.0 | 480.0 | 1,440.0 |
| <u>House Bill (HB) 2017</u> | | | | |
| HB Safety | 10.0 | 10.0 | 10.0 | 30.0 |
| HB Bridge/Seismic | 123.3 | 124.4 | 125.2 | 372.9 |
| HB Preservation/Culvert | 42.2 | 42.6 | 42.9 | 127.7 |
| HB 2017 Apportionment | 175.5 | 177.0 | 178.1 | 530.6 |
| <u>Other Sources</u> | | | | |
| State Funds ⁸ | 12.0 | 12.0 | 12.0 | 36.0 |
| Other Federal ⁹ | 15.0 | 15.0 | 15.0 | 45.0 |

⁸ A significant portion of the state highway fund is used for ODOT's agency operations and as a result are not included as part of the revenue forecast of transportation funds estimated available for transportation projects and programs.

⁹ Miscellaneous federal transportation funding from less common federal programs. See Table X for a description of some less common federal programs which have previously provided transportation funding in Oregon.

| | | | | |
|----------------------------|-------------|-------------|-------------|-------------|
| Other Apportionment | 27.0 | 27.0 | 27.0 | 81.0 |
|----------------------------|-------------|-------------|-------------|-------------|

If less or additional revenues become available than had been forecasted, ODOT manages actual revenues through the STIP amendment process. Federal revenue authority is made available through and subject to the federal authorization, apportionment/appropriation, obligation authority and rescission processes, so actual amounts will vary year to year. State generated revenue is generated by the conditions associated with the collection of those revenues and also subject to year-to-year fluctuations.

Step 2: Distribution of revenues to Categorical Policy Areas (October 2020 – January 2021)

In July 2020, ODOT staff kicked off the development of the 2024-2027 STIP at the July Oregon Transportation Commission (OTC) meeting. As part of kicking off the discussion, the Commission made two early decisions to shape the revenue forecast of the ODOT administered funds, as well as shape the categories in which forecasted revenues will get allocated to.

The first decision by the Commission was to assume a 10% reduction in federal funding for federal fiscal years 2024 through 2027. This decision emerged from the absence of a federal authorization bill addressing federal fiscal years 2024 through 2027 and the highly uncertainty of federal revenues in four to seven years from today. By making this revenue assumption early in the development of the 2024-2027 STIP is to ensure ODOT does not over-commit resources, which could result in the cancelation of projects. However, feedback and public comment submitted to the Commission requested ODOT and the OTC reconsider this assumption spurred a deliberate discussion by the Commission. After some deliberation by the Oregon Transportation Commission members, the Commission moved forward with a revenue assumption to assume a 10% reduction in federal funding.

The second decision made by the Commission was to carry forward the same funding categories utilized in the 2021-2024 STIP. These are:

- **Fix-it** - provides funding for projects which maintain or fix the state highway system. As part of the development process, ODOT will seek direction from the OTC to continue with the current categories or modify program categories.
- **Enhance** - projects which expand or enhance the state owned and operated transportation system
- **Safety** - projects that are focused on reducing fatal and serious injury crashes on Oregon's roads
- **Public and Active Transportation** (formerly Non-Highway) - funds bicycle, pedestrian, public transportation and transportation options projects and programs
- **Local Programs** - provides direct funding to local governments and MPOs so they can fund priority projects
- **Other Functions** - provides funding for workforce development, planning and data collection and administrative programs using federal resources

ODOT staff returned to provide the Commission with a broad estimate the 2024-2027 STIP is expected to be around \$2.1 to \$2.2 billion statewide.

The Oregon Transportation Commission was presented options on how to distribute the estimated \$2.1 to \$2.2 billion forecasted revenues to four policy focused topical areas: **Fix-It, State Highway Enhance, Public and Active Transportation, and Safety** (in addition to Local and Administrative topical areas that are held constant across policy options). Different allocation amounts across these four topical areas are based on direction from the Commission and ODOT developed scenarios to illustrate different potential options for allocating resources to the STIP categories for the Commission to deliberate. The options looked at balancing how to advance the state's transportation goals and outcomes.

To assist the Commission with understanding the potential outcomes of different funding scenarios and tradeoffs, ODOT analyzed the scenarios against key outcome areas including congestion relief, multi-modal mobility, social equity, safety, climate change mitigation, climate change adaptation/resilience, and state of good repair. These goal areas were extrapolated from the Commission's Strategic Action Plan and meet requirements of Executive Order 20-04, which requires considering greenhouse gas (GHG) emissions when making STIP decisions. The ODOT Climate Office designed the process to look specifically at climate outcomes (mitigation and adaptation) and then expanded it to show tradeoffs across other outcomes.

In total, the Commission deliberated and gathered public input on eight different allocation scenarios. The scenarios varied the amount of funding in the four categories: **Fix-It, State Highway Enhance, Public and Active Transportation, and Safety**, while keeping statutory (whether federal or state) minimums in the fix-it, public and active transportation, and safety categories in place. (With the addition of the local programs category staying constant.) Discretionary funding, primarily from the fix-it category and the other functions category were reallocated across state highway enhance, public and active transportation, and safety categories at varying levels and assessed to understand performance around key outcomes. The Commission started with four scenarios and requested ODOT staff gather public input from OTC advisory committees and the general public. With the feedback and direction provided on the initial scenarios, ODOT developed several hybrid scenarios which aimed to satisfy the Commission's direction, address performance on key outcomes, and respond to public comment. After significant debate by the Commissioners with various amendments, the Commission approved the following allocation scenario. (See Table 6) The allocation scenario allows ODOT staff to begin the next steps in the process of proposing revenue levels to specific programs within each category (e.g. bridge program, pavement program, culvert program within the Fix-it category) using the category allocation amount.

Upon considering the expected outcomes of the different investment options, the OTC selected a preferred alternative outlined in Table 6.

**Table 6. Allocation to ODOT Funding Categories (Statewide)
Combined for FFY 2025-2027**

| Category: | Amounts: |
|----------------------------------|----------------------|
| Fix-it | \$826,839,314 |
| ADA Curb Ramps | \$263,160,686 |
| State Highway Enhance | \$175,000,000 |
| Safety | \$147,000,000 |
| Public and Active Transportation | \$255,000,000 |
| Local Programs | \$404,500,000 |
| Other Functions | \$161,410,568 |
| | |
| TOTALS | 2,232,910,568 |

**Step 3: Distribution of revenues to Funding Allocation programs
(January – March 2021)**

The topical policy areas are made up of individual funding allocation programs. After the OTC decision on the distribution of revenues to the topical policy areas, ODOT staff then distributed the forecasted revenues to the individual funding allocation programs within each topical policy area. The following are the funding allocation programs:

Table 7. Description of ODOT Funding Programs

| Fix-It Category | |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund/Program | Description |
| Fix-It Program - Bridge | The Fix-It Bridge program addresses state bridges and the maintenance and operations of bridges within ODOT control. |
| Fix-It Program – Highway Pavement Maintenance | This is the non-capacity enhancing operations and maintenance component to ODOT’s overall system preservation. The Highway Pavement Maintenance program addresses the maintenance, operations, and asset management needs of the interstate and state-owned network. |
| Fix-It Program – Culvert | The Culvert program addresses the rehab and replacements of roadway culverts. |
| Fix-It Program – Operations | The Operations program addresses the maintenance, operations, and asset management of operations equipment, such as traffic signals, ramp meters, variable message signs, and other communications equipment. |
| HB2017 – Bridges Designates a portion of HB2017 funding for Bridge Project | Allocates 70% of House Bill 2017 net revenue for bridge/seismic projects. |

| | |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HB2017 – Pavement Preservation and Culvert Maintenance | Allocates 24% of House Bill 2017 net revenue for pavement and culvert projects. |
| <u>ADA Category</u> | |
| Fund/Program | Description |
| ADA Curb Ramps | Provides funding for the update of ADA curb ramps statewide. |
| <u>State Highway Enhance Category</u> | |
| Fund/Program | Description |
| HB2017 Enhance | Funding for named projects in HB 2017 Sec 71. |
| State Highway Enhance | Program direction under development. |
| <u>Safety Category</u> | |
| Fund/Program | Description |
| All Roads Transportation Safety (ARTS) | A data-driven, jurisdictionally blind safety program to address safety on all public roads. |
| Rail Crossing Safety | Funds highway grade crossing safety improvement projects to reduce the number of fatalities, injuries, and crashes at public railway-highway grade crossings. |
| HB2017 Safety, HB2017 funding for Highway Safety | Allocates \$10 million per year for Safety improvements and projects. |
| <u>Public and Active Transportation Category</u> | |
| Fund/Program | Description |
| Off-System Bicycle/Pedestrian | Funds bicycle and pedestrian paths or trails outside of the highway right of way. |
| Safe Routes to School Education | Funds education and outreach efforts that improve, educate, or encourage children safely walking (by foot or mobility device) or biking to school. |
| Transportation Options | Funds ODOT’s Transportation Options program which supports efforts to improve travel choice for Oregonians and improve the efficiency with which people and goods move through the transportation system. |
| Bike-Ped Strategic | Project to improve pedestrian and bicycle infrastructure on/along the state-owned system. |
| ODOT SRTS Infrastructure | Pedestrian and bicycle infrastructure projects which address the needs of students who walk and bike to school, specifically focused on the state-owned system. |

| | |
|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transit Vehicle Replacement | Public transportation funding for replacement of transit vehicles to which ODOT holds title. |
| Passenger Rail Facility Plan | Planning design of a passenger train servicing and maintenance facility in Eugene. |
| Rec Trails Program | Funds provided to Oregon State Parks for recreational trail projects. |
| Mass Transit | Public transportation funding for vehicle replacement for urban fixed-route bus fleets. |
| Transit Elderly & Disabled | Public transportation funding for capital, purchased service and preventive maintenance projects that serve the mobility needs of people with disabilities and seniors. |
| Bicycle and Pedestrian | Funds bicycle and pedestrian facilities within the right-of-way of public roads, streets or highways open to motor vehicle traffic to meet the requirement for ODOT to spend 1% of State Highway Fund dollars on biking and walking enhancements. |
| HB2017 Safe Routes to Schools Program | Provides \$15 million per year for the Safe Routes to School Program. This program focuses on infrastructure on making sure safe walking and biking routes exist through investments in crossings, sidewalks and bike lanes, flashing beacons, and the like. ODOT administers a competitive infrastructure grant program. |
| <u>Local Programs Category</u> | |
| Fund/Program | Description |
| Surface Transportation Program to large MPOs | STBG Funds allocated to the three (3) Transportation Management Area agencies for program and projects. |
| Transportation Alternatives Program to large MPOs | TAP Funds allocated to the three (3) Transportation Management Area agencies for program and projects to address non-roadway needs. |
| MPO Planning | Funds allocated to the MPOs throughout the state to address federal transportation planning requirements. |
| Congestion Mitigation and Air Quality Improvements (CMAQ) | Funds allocated to MPOs and local agencies in eligible areas to address air quality issues throughout the state. |
| Local Bridge | Funding allocated to address locally owned bridge projects which are located on local facilities. ODOTs Bridge Section coordinates selection and funding of Federal Highway Bridge Program bridges through the Local Agency Bridge Selection Committee, a committee of city, county, and state representatives. Local agency bridges are prioritized using a Technical Ranking System and selected in |

| | |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | categories of Large (30,000+ square feet of deck area), Small On-System, and Small Off-System. |
| STBG Allocation to Cities, MPOs & Counties | Funding allocated to local agencies via the Association of Counties/League of Cities agreement. Agencies receiving funding are non-TMA MPOs, Counties and Cities above 5,000 population and outside of MPOs. |
| Immediate Opportunity Fund | Provides funding to construct and improve streets and roads to serve site-specific economic development projects. Managed in cooperation with the Oregon Business Development Department. |
| Transportation Growth Management (TGM) | The Transportation Growth Management (TGM) program is to support community efforts to expand transportation choices. By linking land use and transportation planning, TGM works with local governments to create vibrant, livable places in which people can walk, bike, take transit or drive where they want to go. The TGM Program awards grants on an annual basis. TGM grants are for planning work leading to local policy decisions. TGM typically awards between \$2 and \$2.5 million per cycle. Projects are selected on a competitive basis within each of the five ODOT regions. The regional allocation – funds available for projects - is based on a formula that considers the number of cities and the population within a region. Grants generally have two-years for projects to be negotiated and completed. Award amounts generally range between \$75,000 and \$250,000. |
| Local Tech Assistance Program (LTAP) | The Local Tech Assistance Program (LTAP) provides assistance to employees and volunteers of grant recipients and others to attend transit-related trainings. Training is provided directly by Public Transit Section staff or at state, regional, and national workshops and conferences. Funds are distributed through competitive and formula processes based on criteria developed by the Public Transit Section. The number of scholarships awarded for a specific event or to an agency may be limited. The Public Transit Section reimburses qualified expenses to the agency (not the individual). Funding is provided through state funding sources and the Federal Transit Administration’s Rural Transit Assistance Program (5311(b)(3)). Attendance at the annual Oregon Public Transportation Conference, grant-related trainings (such as trainings prior to a grant application cycle), transit manager topic trainings, grant management trainings, compliance trainings, training provided by other state agencies or other sources. |

| Other Functions Category | |
|-------------------------------------------|------------------------------------------------------------------------------|
| Fund/Program | Description |
| State Planning and Research | Funding for statewide planning and research as part of federal requirements. |
| Climate Office | Funding allocated to address climate impacts on the transportation system. |
| Workforce Development and On Job Training | Funds allocated to the ODOT Office of Civil Rights. |
| Indirect Cost Allocation Plan (ICAP) | Funds allocated to recoup overhead costs as approved by FHWA |

Table 8. Revenue Allocation Amounts to ODOT Funding Programs (Statewide) Combined for FFY 2025-2027

| Category: | Amounts: |
|-----------------------------------------------------------|----------------------|
| Fix-it | \$826,839,313 |
| Bridge & Seismic Preservation | \$386,146,192 |
| Operations | \$309,000,000 |
| Culverts | \$76,693,122 |
| | \$55,000,000 |
| ADA Curb Ramps | \$263,160,686 |
| ADA Curb Ramps | \$170,000,000 |
| ADA Borrow from Fix-It | \$93,160,686 |
| Enhance | \$175,000,000 |
| HB2017 Enhance | \$110,000,000 |
| Enhance Highway | \$65,000,000 |
| Safety | \$147,000,000 |
| All Roads Transportation Safety | \$108,000,000 |
| Rail Crossing Safety | \$9,000,000 |
| HB2017 Safety | \$30,000,000 |
| Non-Highway | \$255,000,000 |
| Off-System Bicycle and Pedestrian | \$36,000,000 |
| Safe Routes to School Education | \$4,000,000 |
| Transportation Options | \$7,500,000 |
| Bicycle-Pedestrian Strategic | \$45,000,000 |
| ODOT Safe Routes to School Infrastructure | \$10,000,000 |
| Transit Vehicle Replacement | \$15,000,000 |
| Passenger Rail Facility Planning | \$1,000,000 |
| Transportation Alternatives Program – Recreational Trails | |
| Mass transit | \$4,000,000 |
| Transit Elderly and Disabled | \$12,000,000 |
| Bicycle-Pedestrian 1% | \$50,000,000 |
| HB2017 Safe Routes to School Infrastructure | \$25,500,000 |

| | |
|------------------------------------------------------------------|----------------------|
| | \$45,000,000 |
| Local Programs | \$404,500,000 |
| Surface Transportation Program to Large MPOs | \$124,000,000 |
| Transportation Alternatives Program | \$6,000,000 |
| MPO Planning | \$13,000,000 |
| Congestion Mitigation and Air Quality | \$61,000,000 |
| Local Bridge | \$80,000,000 |
| | |
| Surface Transportation Program Allocation to Cities and Counties | \$76,000,000 |
| Surface Transportation Program Allocation to Small MPOs | \$18,000,000 |
| Immediate Opportunity Fund | \$10,500,000 |
| Transportation and Growth Management | \$15,000,000 |
| Local Technical Assistance Program | \$1,000,000 |
| Other Functions | \$161,410,568 |
| State Planning and Research | \$66,000,000 |
| Climate Office | \$4,000,000 |
| Workforce Development/On the Job Training | \$2,250,000 |
| 511 System Operations | \$600,000 |
| Indirect Cost Allocation Plan (ICAP) | \$88,560,568 |
| | |
| TOTALS | 2,232,910,567 |

Step 4: Estimates of Funding Allocation Program revenues to ODOT Region 1 and the Portland Metro MPO area (January – June 2021)

Estimates of each ODOT funding allocation program that could be available to the areas encompassed by ODOT Region 1 and for the Metro Metropolitan Planning Area were created, other than for services provided by ODOT as a statewide program. These estimates were made to provide context for MPO areas to understand potential levels of ODOT investment in their area transportation systems so that they could consider strategy of all investments in meeting the areas priority needs, and then communicating those strategies and priorities to ODOT staff and the allocation processes decision making structure.

The Key for Table 9 summarizes the methods used to develop a forecast or estimate of the revenues that could flow to transportation projects or services. The ODOT Region 1 allocations and estimates were made based on historic trends from those programs, where available. The historical allocations were calculated to find the estimated percentage of how much of the funding program total was allocated to projects with ODOT Region 1. With funding programs which are new and previous allocation a rough estimated range was identified based on the funding program rules.

Recognizing ODOT Region 1 encompasses areas outside the Portland metropolitan region, a reduced level of funding was estimated for funding coming to the Metro metropolitan planning area within ODOT Region 1. The specific method used for this amount is summarized in the Key to Table 9.

These estimates are not to be interpreted as a commitment of an allocation of funds, but only an estimate to provide MPO areas the ability to understand the scale of funding available within programs to inform the development of the MTIP to pursue and advocate to ODOT or the Oregon Transportation Commission on local/regional priorities.

In the Portland metropolitan area, the following estimates were developed for the ODOT funding allocation programs.

Table 9: ODOT Funding Program Amounts, Federal Fiscal Years 2025-2027

| Funding Program | Statewide Amount | ODOT Region 1 Amount | Metro MPA Amount |
|--------------------------------------------------|-----------------------------|-----------------------------|-------------------------|
| <i>Fix-it</i> | | | |
| <i>Bridge</i> | \$386,146,192 | \$90,000,000* | \$72,000,000/ |
| <i>Preservation</i> | \$309,000,000 | \$22,300,000* | \$17,840,000/ |
| <i>Operations</i> | \$76,693,122 | \$22,108,613* | \$17,690,000/ |
| <i>Culverts</i> | \$50,000,000 | \$6,000,000* | \$0 |
| <i>ADA Curb Ramps</i> | | | |
| <i>ADA Curb Ramps * /</i> | \$170,000,000 | \$77,333,000 | \$61,870,000/ |
| <i>Pay back for 2021-24 Curb Ramps</i> | \$93,160,686 | TBD ^ | TBD ^ |
| <i>Sub-Total</i> | \$1,089,990,000 | | \$169,400,000 |
| <i>State Highway Enhance</i> | | | |
| <i>HB2017 Enhance</i> | \$110,000,000 ¹⁰ | \$0 | \$0 |
| <i>State Highway Enhance</i> | \$65,000,000 | TBD ^ | \$18,480,000 ^ |
| <i>Sub-Total</i> | \$175,000,000 | | \$18,480,000 |
| <i>Safety</i> | | | |
| <i>All Roads Transportation Safety</i> | \$108,000,000 | \$28,394,948 * | \$22,720,000 / |
| <i>Rail Crossing Safety</i> | \$9,000,000 | \$300,000 * | \$240,000 / |
| <i>HB2017 Safety</i> | \$30,000,000 | | \$11,100,000 ^ |
| <i>Sub-Total</i> | \$147,000,000 | | \$34,060,000 |
| <i>Public & Active Transportation</i> | | | |
| <i>Off-System Bicycle and Pedestrian</i> | \$36,000,000 | TBD ^ | \$13,320,000 ^ |

¹⁰ Remaining funding dedicated to named transportation projects in House Bill 2017.

| | | | |
|-----------------------------------------------------------------------------------------|------------------------|----------------|----------------------|
| <i>Transportation Alternatives Program – Recreational Trails</i> | \$4,000,000 | \$300,000 * | \$0 |
| <i>Bicycle-Pedestrian Strategic</i> | \$45,000,000 | \$14,100,000 * | \$11,280,000 / |
| <i>Bicycle-Pedestrian 1%</i> | \$25,500,000 | 6,000,000 # | \$4,800,000 / |
| <i>HB2017 Safe Routes to School Infrastructure</i> | \$45,000,000 | TBD ^ | \$16,650,000 ^ |
| <i>ODOT Safe Routes to School Infrastructure</i> | \$10,000,000 | TBD ^ | \$3,700,000 ^ |
| <i>Safe Routes to School Education</i> | \$4,000,000 | TBD ^ | \$1,480,000 ^ |
| <i>Transportation Options</i> | \$7,500,000 | TBD ^ | \$2,775,000 ^ |
| <i>Transit Vehicle Replacement</i> | \$15,000,000 | TBD ^ | \$0 |
| <i>Passenger Rail Facility Planning</i> | \$1,000,000 | TBD ^ | \$370,000 ^ |
| <i>Mass transit</i> | \$12,000,000 | \$4,560,000 * | \$4,560,000 * |
| <i>Transit Elderly and Disabled</i> | \$50,000,000 | \$16,650,000 * | \$13,320,000 / |
| Sub-Total | \$255,000,000 | | \$72,255,000 |
| ODOT Directed Funding | \$1,667,000,000 | | \$304,125,000 |
| | | | |
| Local Programs | | | |
| <i>Surface Transportation Program to Large MPOs</i> | \$124,000,000 | \$93,600,000 * | \$93,600,000 |
| <i>Transportation Alternatives Program</i> | \$6,000,000 | \$4,380,000 * | \$4,380,000 |
| <i>MPO Planning</i> | \$13,000,000 | \$1,800,000 * | \$1,800,000 |
| <i>Congestion Mitigation and Air Quality</i> | \$54,300,000 | \$39,640,000 * | \$39,640,000 |
| Sub-Total Local to MPO | \$204,000,000 | | \$139,420,000 |
| <i>Local Bridge *</i> | \$80,000,000 | \$31,224,000 * | \$24,980,000 / |
| <i>Surface Transportation Program Allocation to Cities and Counties (non MPO areas)</i> | \$76,000,000 | \$6,500,000 @ | \$0 |
| <i>Immediate Opportunity Fund</i> | \$10,500,000 | \$1,000,000 * | \$800,000 / |
| <i>Transportation and Growth Management</i> | \$15,000,000 | \$3,000,000 * | \$2,500,000 / |
| <i>Local Technical Assistance Program</i> | \$1,000,000 | N/A | N/A |
| Sub-Total Local to City/County | \$182,500,000 | | \$28,280,000 |

| | | | |
|----------------------------------------------------------|------------------------|--------------------------|----------------------|
| Local Program Sub-Total | \$386,500,000 | | \$167,700,000 |
| Other Functions | | | |
| <i>State Planning and Research</i> | \$66,000,000 | \$8,500,000 * | N/A |
| <i>Climate Office, Workforce Development, 511 System</i> | \$6,850,000 | N/A – statewide programs | N/A |
| <i>Indirect Cost Allocation Plan</i> | \$88,560,568 | N/A | N/A |
| Sub-Total | \$161,410,568 | | |
| Grand Total | \$2,215,000,000 | | \$461,895,000 |

Key to Table 9

| | |
|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Forecast Amount to ODOT Region 1 | |
| TBD | Not yet defined how ODOT Region sub-allocation or project allocations will be made. |
| ^ | Allocated through competitive, discretionary, or mandated statewide process. Forecast 37% of funds come to Metro region based on % of state population unless otherwise noted. |
| * | Estimate based on historic allocation performance % or direct awards in last STIP cycle. |
| # | Actual ODOT Region sub-allocation target. |
| @ | Estimate based on percentage of statewide long-range funding forecast |
| Forecast Amount to Metro area portion of ODOT Region 1 | |
| / | Metro area forecast based on estimate of 80% of Region 1 funding allocated to Metro area projects. Typically used unless historical allocations or program purpose or direction indicates a different percentage more appropriate. |

2024-27 MTIP Revenue Forecast

Transit Agency Revenue Forecasts

The revenue forecast and funding allocation process for transit funding for TriMet and SMART is completed in three phases:

- Estimation of the transit agency revenues (Fall 2020 – Spring 2021),
- Forecasted distribution of estimated transit agency revenues to transit agency budget programs (Winter – Spring 2021), and
- Adoption of final annual budget (Spring – Summer of each year for the subsequent fiscal year).

This revenue forecast documents the first two steps of this process. TriMet and SMART provide a description of the third step with the MPO annually in conjunction with their budget process.

A revenue forecast for transit funding takes place annually as part of the agency's budget process, which differs from the three-year funding cycle allocation undertaken by Metro and ODOT for the allocation of federal, state, and regionally significant local revenues. The transit agencies revenue forecast uses the annual budget process to inform the development of the transit portion of the revenue forecast of the 2024-2027 MTIP.

Step 1: SMART Revenue Forecast

As part of SMART's annual budget process, a revenue and expenditure forecast is developed. This MTIP reports on SMART's revenue forecast for the relevant MTIP years of 2024 through 2027. Base assumptions to developing the forecast are based on historical trends and updated with actual appropriations and limitations. SMART begins with a baseline by averaging the most recent 3-year revenues. Anticipated levels of funding are then forecasted from the baseline with an expected increase of 1%-3%. The forecast will be adjusted if changes to revenues or current cost structures change significantly. SMART collaborates with TriMet and C-TRAN to estimate shares of the Urbanized Area Formula Funds from the Federal Transit Administration as they become available.

Non-Federal Operating Revenues

Payroll Tax: SMART's predominant source of ongoing funding is the local payroll tax levied on businesses performing work in Wilsonville assessed on gross payroll and/or self-employment earnings. The payroll tax on local businesses covers employment within city limits and in 2008 the tax rate was raised to its current level of .5 percent (.005). Transit tax funds are used to pay for SMART operations and to leverage funding from federal and state grants. Payroll tax amounts collected by the city typically increase year to year, as companies increase their payroll through wage adjustments or by adding to their payroll and as the economy grows with new businesses relocating to the city.

Passenger Fares: A very small component of local funding includes charges for services, such as fare box and transit pass sale revenue. SMART's commitment to diversity, equity and inclusion is augmented by offering fare free service on nearly all routes. Currently, SMART charges fares for the regional Route 1X that travels between Salem and Wilsonville and a regional Dial-a-Ride

program that provides door-to-door medical trips for Wilsonville residents to the greater metro area

Other Revenues: SMART recognizes a small percentage of other income received by way of investment and donations. These monies are outside of the traditional structure of revenues and may be reinvested or reallocated.

Statewide Transportation Improvement Fund (STIF): With the passage of House Bill 2017, Keep Oregon Moving, the Oregon Legislature made a significant investment in transportation to help advance the things that Oregonians value—a vibrant economy, strong communities, high quality of life, a clean environment, and safe, healthy people. This historic investment in Oregon’s transportation system will produce benefits for decades to come. SMART is part of that investment, connecting many regional communities through coordination with numerous transportation partners. STIF funds enable SMART to leverage federal funding for capital purchases and expand intercity transit connectivity. SMART has many goals, based from citizen surveys and customer feedback for how STIF will enhance the region’s transportation network, including express service to Clackamas Town Center and Downtown Portland. For these projects to come to fruition, SMART seeks plan approval from Wilsonville’s City Council and Clackamas and Washington County Advisory Committees before submitted to TriMet’s STIF Advisory Committee for regional approval. The plan is then packaged, reviewed by ODOT and approved by the Oregon Transportation Commission.

Federal Operating Grants

Section 5307 Urbanized Area Formula Program: Eligible activities include: planning, engineering, design and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement, overhaul and rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities; and capital investments in new and existing fixed guideway systems including rolling stock, overhaul and rebuilding of vehicles, communications, and computer hardware and software. In addition, associated transit improvements and certain expenses associated with mobility management programs are eligible under the program. All preventive maintenance and some Americans with Disabilities Act complementary paratransit service costs are considered capital costs. Urbanized areas of 200,000 or more may not use funds for operating assistance.

Funding is apportioned on the basis of legislative formulas. For areas with populations of 200,000 and more such as the Portland-Vancouver urbanized area, the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles as well as population and population density. These funds are sub-allocated by agreement within the urbanized area between TriMet, C-Tran, and SMART; the three transit agencies that serve the metropolitan area.

Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program: Formula funding to states for the purpose of operating assistance in meeting transportation needs of

the elderly and persons with disabilities. In addition of transit agencies being eligible, non-profit organizations are also eligible for 5310 Enhanced Mobility of Seniors and Individuals with Disabilities funding. FTA Section 5310 Elderly and Disabled Capital program funds are funds to be used to make purchases of capital equipment or construction of small facilities. The expenditures must be used to support transportation services for seniors and persons with disabilities. The funds are provided through a competitive grant program on a biennial cycle. As FTA funds, they follow all federal requirements associated with the program. Projects funded with this program are intermittent and on an as-needed basis. A small amount of additional 5310 funds comes to SMART as a result of Wilsonville’s status as a “direct recipient” of FTA monies. These funds come to the region and SMART’s share is determined through a negotiated process involving SMART, TriMet, and C-Tran.

Section 5339(a) Grants for Buses & Bus Facilities Formula Program: Provides funding to states and transit agencies through a statutory formula to replace, rehabilitate, and purchase buses and related equipment and to construct bus-related facilities. In addition to the formula allocation, this program includes two discretionary components: The Bus and Bus Facilities Discretionary Program and the Low or No Emissions Bus Discretionary Program. The Bus and Bus Facility Discretionary program funds are distributed through a competitive process by the FTA. These fund can be used only for the purchase of rolling stock or the construction of transit facilities that support transit bus operations. The Low or No Emissions Bus Discretionary program provides for the purchase or lease of zero-emission and low-emission transit buses as well as acquisition, construction, and leasing of required supporting facilities. These funds are allocated through a highly competitive process. Future awards are dependent on the specific process outlined by the FTA and the strength of other project proposals competing against SMART’s requests for funding. SMART has had a fairly successful track record in securing these and other FTA grant funds for replacement buses, and has been able to modernize the fleet in recent years.

Table 10. SMART Revenue Forecast, Federal Fiscal Years 2024-2027

| Revenues | FY 2024 | FY 2025 | FY 2026 | FY 2027 | FYs 2024-27 Total |
|-------------------|-------------|-------------|-------------|-------------|-------------------|
| Passenger Fares | \$16,658 | \$16,879 | \$17,100 | \$17,321 | \$67,958 |
| Payroll Taxes | \$5,189,890 | \$5,245,451 | \$5,301,013 | \$5,356,574 | \$21,092,928 |
| Operating Grants* | \$2,115,468 | \$2,156,150 | \$2,196,832 | \$2,237,514 | \$8,705,965 |
| STIF | \$2,026,500 | \$2,074,750 | \$2,123,000 | \$2,171,250 | \$8,395,500 |
| Other Funding | \$84,800 | \$87,200 | \$89,600 | \$92,000 | \$353,600 |

*Operating Grants include federal funding revenues listed in more detail below.

**Table 11. Federal Grants to SMART Forecast, Federal Fiscal Years 2024-2027
(From the SMART Programming of Projects)**

| Funding Source | FY 2021 | FFY 2024 | FFY 2025 | FFY 2026 | FFY 2027 |
|----------------------------------------------------------------------------------------------|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------------|-----------------|
| Section 5307 Urbanized Area Formula | \$381,770 | \$416,600 | \$428,212 | \$439,823 | \$451,434 |
| Section 5310 Enhanced Mobility of Seniors & Individuals w/Disabilities | \$32,515 | \$35,481 | \$36,470 | \$37,459 | \$38,448 |
| Section 5339(a) Bus & Bus Facilities | \$102,416 | \$111,760 | \$114,875 | \$117,990 | \$121,105 |
| Other Federal Discretionary Funding Awards | \$240,000 | TBD – will be programmed if applications for funding are awarded at the discretion of the Federal Transit Administration or other federal agency. | | | |

1. 5307 Urbanized Area Formula

Project name: Preventive Maintenance, Engineering & Design

Description: For preventive maintenance of existing vehicle fleet (including .5 service worker) and engineering and design services for SMART Fleet/Administration Phase II Expansion.

2. 5310 Formula Enhanced Mobility of Seniors and Individuals with Disabilities

a) Project Name: Demand Response Operations

Description: Funds applied to demand response operating costs.

b) Project Name: Travel Training

Description: Contract with 3rd party vendor for mobility management and special transportation service provider in the greater Portland region to provide free travel training for seniors and people with disabilities in Wilsonville.

3. 5339 (a) Bus and Bus Facilities

a) Project Name: Wilsonville Transit Center Design Upgrade

Description: Engineering and design work for rider amenities including covered walkways, seating, bike locker enclosure, and landscaping.

b) Project Name: Bus Shelters and Amenities

Description: Vendor will produce three design options and their related budgets.

**Step 2: SMART – Distribution of Revenues to Major Budget Categories
(Winter – Spring – Annually)**

SMART has several categories of activities for its budget process that are assigned forecasted revenues. All plans and concepts that SMART utilizes are derived from goals of the Wilsonville City Council, SMART's governing board. Department goals are then used, along with community participation, to create a Transit Master Plan (TMP). The TMP is the primary guiding document that permits project implementation. Included in the TMP is the Statewide Transportation Improvement Fund (STIF) which, in general, is allocated for route expansion and intercity connectivity. These plans allow SMART staff to forecast the apportionment of funding to specific capital projects and operational expansions.

SMART relies on ODOT's Transit Asset Management Group Plan (TAM) in determining funding for current and future maintenance of transit assets, such as rolling stock, infrastructure, equipment, and facilities. SMART uses the TAM in coordination with the TMP to forecast the funding needed for assets in correlation to future projects.

Operations

Total day-to-day Operating Requirements for all activities required to operate the system (including other post-employment benefits) and Debt Service (if applicable). Sub-categories, especially categories that are typically assigned federal grant program revenues, include:

Bus Preventive Maintenance

Description: Labor and materials/services used for on-going maintenance of the SMART Bus fleet. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues and local payroll tax revenue sources.

Bus Purchases

Description: Purchase of buses for fixed route service. This budget category utilizes federal Section 5339(a) Grants for Buses & Bus Facilities Formula Program revenues, Statewide Transportation Improvement Fund revenues, and local payroll tax revenues.

Capital Improvement Program

Description: Purchase and installation of bus shelters and passenger amenities at bus stops. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues and local payroll tax revenue sources.

Step 3: Adoption of Annual Budget (Spring – early Summer – Annually)

Each year SMART shares with the MPO the proposed budget for the upcoming fiscal year. This takes place at the regular committee meetings of TPAC and JPACT. The presentation includes the budget themes and categories. It also includes the federal programming of projects. Further information is provided on the budget process and timeline. The MPO has the opportunity to comment on the budget, request information regarding how the proposed budget reflects regional transportation planning priorities and vote on including proposed federal transit fund programming is to be included in the MTIP.

In conjunction with the annual budget process, SMART publishes the federally required “Program of Projects”, showing how federal grant funding for the upcoming fiscal year will be proposed for inclusion in the current Metropolitan Transportation Improvement Program. This proposed programming will have the most current forecast of available funds and may include new programming or be an update to existing programming of the federal grant funds. An opportunity for public comment on the Program of Projects is also provided as a part of this process.

The SMART budget process includes a minimum of two public Budget Committee meetings. The City’s Budget Committee consists of the five city councilors and five citizens at large. The citizens are appointed by the governing body and serve three-year terms. Once the budget is approved by the committee it is then sent to City Council for final adoption. City Council adopts the budget prior to July 1.

TriMet – Revenue Forecast

As part of TriMet’s annual budget process, a 10-year revenue and expenditure forecast is developed. This MTIP forecast utilizes the 10-year budget forecast and reports on the relevant MTIP years of 2024 through 2027. TriMet has six categories of revenues; passenger fares, payroll taxes, State transit investment funds, other funding, operating grants (federal and non-federal), and capital improvement grants (federal).

A short description of each of the six categories of revenues are provided below.

Passenger Fare revenues: funds from the sale of passes and individual fares. Fare collection revenue is forecasted to grow at varying rates from a high of 30.5% in 2024 as the region recovers from Covid19 related ridership reductions to a low of 3.4% in 2026. Forecast factors in a fare increase every other year beginning in 2023.

Payroll taxes: revenues from a tax on the wages paid by an employer and the net earnings from self-employment for services performed within the TriMet District boundary. The current rate is 0.7837%. Employer tax revenues during this time is expected to increase due to economic recovery. Future tax rate is currently scheduled to increase incrementally through 2026, accounting for additional revenue growth from this source.

State Transit Investment Fund (STIF): funds from the State of Oregon, who collect several taxes and fees to pass through to public transit service providers to support transit service in the state. The STIF is primarily funded through a tax on employees. Through legislation which was passed in 2020, some additional small state formula funding programs for public transit, such as the lottery tax funded Special Transportation Fund, were combined into the STIF for administration and grant-making purposes.

Other Funding: 71% of Other Funding is sourced by revenue streams that have equaling expenditures to TriMet and no net gain to the agency (*Line of Credit and Intergovernmental*

Agreements/Funding exchange). The remaining 29% of the revenue stream is mostly comprised of Transit Advertising, cost per ride reimbursements for Oregon Department of Human Services, City of Portland reimbursement for Streetcar Personnel, Energy Tax Credit Sales revenue and other smaller miscellaneous revenues.

Operating Grants

Non-Federal Operating Grants

Annually is expected from miscellaneous sources, such as ODOT 5310 funds, ODOT Mass Transit program, City of Wilsonville Westside Express Service (WES) operating assistance contribution and a small amount of local contributions.¹¹ These small contributions account for limited amount of revenues in TriMet's overall annual budget.

Federal Operating Grants

Section 5307 Urbanized Area Formula Program: Eligible activities include: planning, engineering, design and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement, overhaul and rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities; and capital investments in new and existing fixed guideway systems including rolling stock, overhaul and rebuilding of vehicles, track, signals, communications, and computer hardware and software. In addition, associated transit improvements and certain expenses associated with mobility management programs are eligible under the program. All preventive maintenance and some Americans with Disabilities Act complementary paratransit service costs are considered capital costs. Urbanized areas of 200,000 or more may not use funds for assistance in providing service operations.

Funding is apportioned on the basis of legislative formulas. For areas with populations of 200,000 and more such as the Portland-Vancouver urbanized area, the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles as well as population and population density. These funds are sub-allocated by agreement within the urbanized area between TriMet, C-Tran and SMART; the three transit agencies that serve the Portland/Vancouver urbanized area as defined by the Census Bureau and recognized by the FTA for distribution of these funds.

Section 5337 State of Good Repair Grant Program (High Intensity Motorbus and High Intensity Fixed Guideway): This funding program provides capital assistance for maintenance, replacement, and rehabilitation projects of high-intensity fixed guideway and bus systems to help transit agencies maintain assets in a state of good repair. Available for capital projects that maintain a fixed guideway or a high intensity motorbus system in a state of good repair, including projects to replace and rehabilitate:

- rolling stock

¹¹ TriMet considers pass through funds from ODOT, such as the FTA 5310 funding, as non-operating revenues because they are passed through the state.

- track
- line equipment and structures
- signals and communications
- power equipment and substations
- passenger stations and terminals
- security equipment and systems
- maintenance facilities and equipment
- operational support equipment, including computer hardware and software; as well as implement transit asset management plans.

Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program: Formula funding to states for the purpose of assisting in meeting transportation needs of the elderly and persons with disabilities. Some 5310 funds is allocated, through a competitive grant process to private non-profit organizations which provide transportation services for seniors and individuals with disabilities as well as to TriMet’s paratransit program, vehicle fleet replacement or expansion to provide services for senior and individuals with disabilities services, and SMART’s various transit program for seniors and individuals with disabilities.

Section 5339(a) Grants for Buses & Bus Facilities Formula Program: Provides funding to states and transit agencies through a statutory formula to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities. In addition to the formula allocation, this program includes two discretionary components: The Bus and Bus Facilities Discretionary Program and the Low or No Emissions Bus Discretionary Program. Potential discretionary funds are not included in the forecast at this time as they have not been secured.

Urban Surface Transportation Block Grant (STBG) or Congestion Mitigation – Air Quality (CMAQ): Metro programs Urban STBG or CMAQ federal funding authority to TriMet as committed in prior RFFA funding cycles consistent with a payment schedule on bonded debt that was used to plan and construct the region’s rail transit system and for project development of other projects.

Capital Improvement Grants: The Federal Transit Administration provides some application based and discretionary grants for projects, including the Capital Investment Grants program described below. At this time, no discretionary or capital improvement grants are secured for receipt within the 2024-2027 time period. TriMet anticipates applying for capital funding, which will be added to the forecast and programmed in the MTIP as funding is secured.

Section 5309 Capital Improvement Grants (CIG)

Provides funding through a multi-year competitive process for transit capital investments, including heavy rail, commuter rail, light rail, streetcars, and bus rapid transit. Federal transit law requires transit agencies seeking CIG funding to complete a series of steps over several years to be eligible for funding.

Table 12. Summary of TriMet Forecasted Revenues, Fiscal Years 2024 – 2027

| Revenues (Millions of \$) | FY 2024 | FY 2025 | FY 2026 | FY 2027 | FYs 2024-2027 Total |
|--------------------------------------|---------------------------------------------------|----------------|----------------|----------------|----------------------------|
| Passenger Fares | 95 | 106 | 110 | 115 | 426 |
| Payroll Taxes | 459 | 480 | 503 | 523 | 1,965 |
| STIF | 16 | 23 | 23 | 27 | 89 |
| Other Funding | 96 | 97 | 97 | 98 | 388 |
| Operating Grants* | 90 | 91 | 93 | 94 | 368 |
| Capital Improvement Grants | No forecast - to be determined on award of grants | | | | |

*Operating Grants include federal funding revenues listed in more detail below.

**Table 13. Federal Grants to TriMet, Federal Fiscal Years 2024-2027
(Part of Operating Grants element of Table 12)**

| Funding Source | FFY 2024 | FFY 2025 | FFY 2026 | FFY 2027 | FYs 2024-2027 Total |
|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------------|-----------------|----------------------------|
| Section 5307 Urbanized Area Formula | 41.3 | 42.2 | 43.0 | 43.9 | 170.4 |
| Section 5337 State of Good Repair | 24.3 | 24.8 | 25.3 | 25.8 | 100.2 |
| Section 5310 Enhanced Mobility of Seniors & Individuals w/Disabilities | 1.4 | 1.4 | 1.4 | 1.5 | 5.7 |
| Section 5339(a) Bus & Bus Facilities | 0 | 0 | 0 | 0 | 0 |
| Urban STBG or CMAQ Bond payment | 21.8 | 21.8 | 21.8 | 21.7 | 87.1 |
| Other Federal Discretionary Funding Awards | TBD – revenues will be programmed if applications for funding are awarded at the discretion of the Federal Transit Administration or other federal agency. | | | | |

TriMet – Distribution of Revenues to Major Budget Categories

TriMet has four major categories of activities for its budget process that are assigned forecasted revenues; operations, capital improvement program, pass through and special payments, and contingency and ending fund balance.

Operations

Total day-to-day Operating Requirements for all activities required to operate the system (including other post- employment benefits) and Debt Service.

Sub-categories within operations that are typically assigned federal grant program revenues and amended into the MTIP, include:

Bus & Rail Preventive Maintenance: Labor and materials/services used for on-going maintenance of the TriMet Bus and Rail fleets. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues, Section 5337 State of Good Repair Program revenues.

Bus Purchases: Purchase of buses for fixed route service. This budget category utilizes federal Section 5339(a) Grants for Buses & Bus Facilities Formula Program revenues.

Capital Improvement Program

TriMet typically seeks federal Capital Improvement Grant program and other discretionary funding sources for large capital projects. A current example is the MAX Red Line project that is slated to receive federal CIG funds. At this time, no projects have secured funding expected for the 2024 – 2027 timeframe. As such funds are secured, they will be added into the MTIP through the amendment process.

Pass Through and Special Payments

Funds which TriMet receives that are required to be provided to other governmental agencies. One sub-category of this budget category includes:

Elderly and persons with disability services: To fund mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area. Pass Through subrecipients include, but not limited to non-profit organizations, SMART, and Ride Connection This budget category utilizes federal Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program revenues.

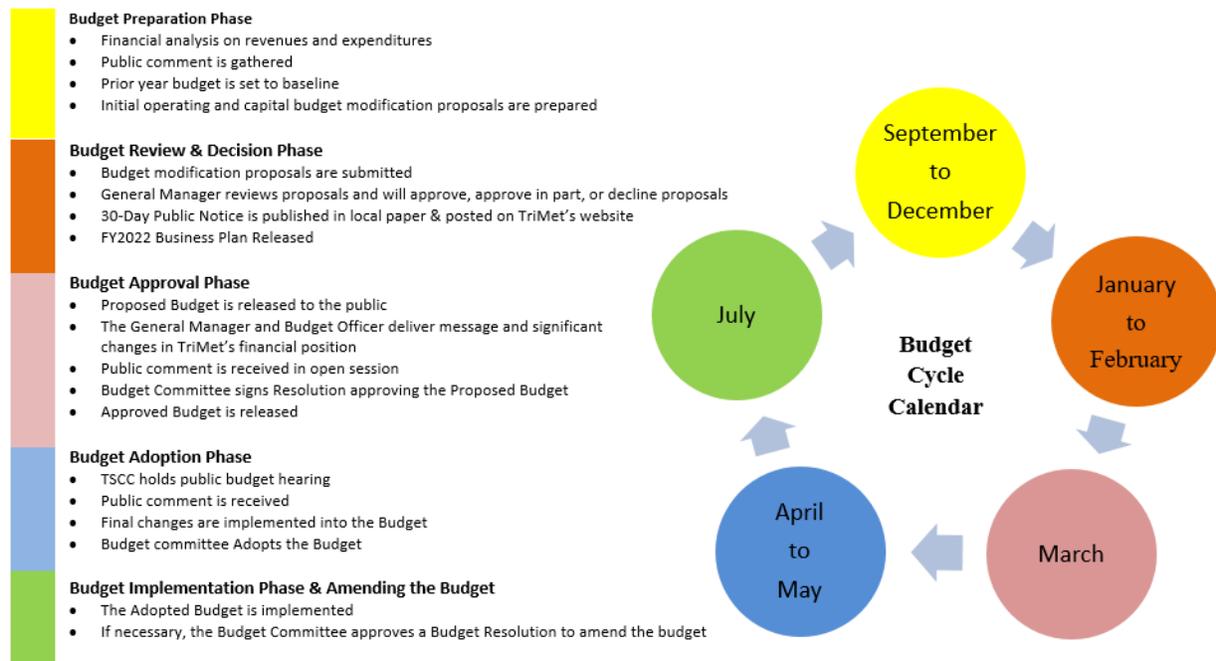
Contingency and Ending Fund Balance

Contingency is an appropriated amount of a minimum of 3% of operating requirements and is adjusted for risks and those activities unknown at the time of budget adoption. Ending Fund Balance is unappropriated and not available for spending in its budget fiscal year. Fund balance includes restricted bond proceeds and other restrictions to be spent after that budget year, restricted revenues for future debt service payments; and unrestricted fund balance, which contains between 2.0 and 2.5 months operating reserves as required by the TriMet Board of Directors.

Adoption of Annual Budget

The development, adoption, and implementation of the TriMet budget has five phases as summarized in the graphic below.

Budget Cycle & Calendar



The TriMet budget process is guided by the agency Vision, Mission and Values, the annually updated Business Plan with a 5-year horizon, Financial Policies, and a budget process that meets budget law. The current TriMet budget and a description of the budget process for next fiscal year is available here: <https://trimet.org/budget/>

Coordination of the TriMet Budget and the MTIP

Each year TriMet shares with the MPO the proposed budget for the upcoming fiscal year. This takes place at the regular committee meetings of TPAC and JPACT. The presentation includes the budget themes and categories. It also includes the federal programming of projects. Further information is provided on the budget process and timeline. The MPO has the opportunity to comment on the budget, request information regarding how the proposed budget reflects regional transportation planning priorities and vote on including proposed federal transit fund programming is to be included in the MTIP.

In conjunction with the annual budget process, TriMet publishes the federally required "Program of Projects", showing how federal grant funding for the upcoming fiscal year will be proposed for inclusion in the current Metropolitan Transportation Improvement Program. This proposed programming will have the most current forecast of available funds and may include new programming or be an update to existing programming of the federal grant funds. An opportunity for public comment on the Program of Projects is also provided as a part of this process.

Memo

Date: May 28, 2021
To: TPAC and Interested Parties
From: Dan Kaempff, Principal Transportation Planner
Subject: 2025-2027 Regional Flexible Funds Allocation Program Direction

Introduction

Staff is presenting the 2025-2027 Regional Flexible Funds Allocation (RFFA) Program Direction and seeking TPAC’s recommendation to JPACT.

Updating existing program direction

At the outset of each RFFA cycle, the region updates the Program Direction used in the previous cycle. This is done to ensure the regional funds continue to be aligned with updated Regional Transportation Plan (RTP) policy direction and respond to current and anticipated system needs. And it maintains consistency with previously adopted regional intent for the purpose and process used in allocating these funds.

Starting with input received through the 2022-2024 RFFA retrospective, Metro staff conducted a multi-month process to identify and discuss updates to the 2022-2024 Program Direction. Staff led a series of discussions with TPAC, JPACT, regional decision-makers and stakeholders to identify ways in which the Program Direction could be updated. A total of eight meetings and workshops were held to gather input, as listed below:

| 2025-2027 RFFA Program Development meetings | | |
|---------------------------------------------|----------------|----------------|
| TPAC | JPACT | Workshops |
| February 5, 2021 | March 18, 2021 | March 10, 2021 |
| April 2, 2021 | May 20, 2021 | April 8, 2021 |
| May 7, 2021 | | April 28, 2021 |

In these meetings, a number of Program Direction adjustments were proposed and discussed. The following is a brief summary of the main topics of those discussions and how they have been responded to in the 2025-2027 RFFA Program Direction.

1. Change to single Step 2 project category – There is support for a single Step 2 category that provides greater flexibility than the previous two funding categories provided to allow for more comprehensive, multi-modal project applications. As was the case in previous RFFA processes, the intent is to provide this flexibility but to retain a focus on projects that advance active transportation (AT) and complete streets, and freight and economic development as the previous categories provided.

The 2025-2027 RFFA Program Direction will have one Step 2 category that reflects the RTP investment priority areas’ intent. Projects will be evaluated in how well they implement the four RTP investment priorities. The criteria and associated measures will show that AT and freight and economic development will continue to be emphasized. But no specific funding amount is designated for either focus area.

2. No weighting of the four RTP priorities – The question of weighting any of the four RTP investment priorities was posed in the discussions. There was not an indication that participants felt any of the four priorities should be emphasized in the technical evaluation. The technical evaluation will develop a rating of each project within each of the investment priority areas in addition to an overall rating. Staff will present this information in such a way as to give decision-makers the ability to select projects that best advance any of the four priorities. The intent is to give decision-makers a clearer understanding of each project’s relative strengths compared to others and more flexibility in how they prioritize projects for funding. As there is no policy direction to fund only the projects with the highest overall ratings, decision-makers can use this information to advocate for specific projects. Or they can use it collectively to develop a package of investments that achieve specific policy objectives.

3. Outcomes-based criteria – With the creation of a single-category Step 2, project evaluation criteria have been updated to reflect this change and more specifically articulate how the Investment Priority categories will be evaluated as an element of the Program Direction. The following table – found in the 2025-2027 RFFA Program Direction – lists the criteria to be used to demonstrate how thoroughly and completely a proposed project is aligned with RTP Investment Priorities. It is important to emphasize that the criteria in the center column is what is being adopted in the 2025-2027 RFFA Program Direction. The performance measures in the third column (rightmost) are examples of measures to be used in evaluating the various features of projects. These performance measures will be considered and further developed by a technical evaluation work group convened by Metro. The work group will be comprised of regional agency staff and community members with expertise in transportation. They will meet over the summer of 2021 to develop technical evaluation performance measures and methodology. Staff will present the evaluation methodology and framework to TPAC for their review and input prior to the opening of the project call in November 2021.

Step 2 Project Technical Evaluation Criteria

| 2018 Regional Transportation Plan Priorities ¹ | Outcome(s) Being Measured (Project Criteria) | Performance Measures to Consider ² |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Equity</p> <p>Reduce barriers and disparities faced by historically marginalized communities, particularly for communities of color and people with low income.</p> | <p>Increased accessibility</p> <p>Increased access to affordable travel options</p> | <ul style="list-style-type: none"> • Access to opportunity (jobs, school and other destinations people need to thrive) • Access to transit • Access to active transportation network/ system completeness in Equity Focus Areas, near transit, and/or on high injury |

¹ Summarized from 2018 RTP Regional Transportation Plan

² Final RFFA performance measures will be developed prior to the Call for Projects in November 2021

| 2018 Regional Transportation Plan Priorities ¹ | Outcome(s) Being Measured (Project Criteria) | Performance Measures to Consider ² |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | corridors and TSMO and TDM programs |
| <p>Safety</p> <p>Reduce fatal and severe injury crashes to move the region as quickly as possible toward Vision Zero, particularly for communities of color and other historically marginalized communities.</p> | Reduced fatal and serious injury crashes for all modes of travel | <ul style="list-style-type: none"> • System completeness of bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs • VMT/capita • Multi-Modal Level of Service, LTS, ped crossing index |
| <p>Climate Change</p> <p>Reduce greenhouse gas emissions from cars and small trucks to reduce the impacts of climate change, particularly for communities of color and other historically marginalized communities.</p> | <p>Reduced emissions from vehicles</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • VMT/capita • System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials and/or on high injury corridors and TSMO and TDM program |
| <p>Congestion</p> <p>Manage travel demand and increase use of travel options to make travel more reliable on the region’s busiest roadways, particularly for communities of color and other historically marginalized communities.</p> | <p>Increased reliability</p> <p>Increased travel efficiency</p> <p>Increased travel options</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • Travel time • Travel time reliability • VMT/capita • Duration of congestion • Volume/capacity ratio • System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs |

4. Evaluating economic outcomes – The RTP Investment Priorities were developed and adopted with an underlying principle that by focusing the region’s investments on Equity, Safety, Climate and Congestion, economic benefits would also be achieved. While the Chapter 2 of the 2018 RTP identifies the importance of the regional transportation system in supporting a healthy, growing economy, it does not uniquely emphasize support for the economy as a near-term funding priority in Chapter 6.

While discussion indicated an overall belief that it is important to show how RFFA investments are helping improve the region’s economy and supporting economic growth, there was not a preferred or recommended methodology identified for how to do that.

The technical evaluation will include performance measures that illustrate economic benefits. Examples of Metro data sources to be used to measure economic outcomes include the Economic Value Atlas and the Active Transportation Return on Investment. Further work to develop final measures will occur in the technical evaluation work group meetings.

5. Enhanced Transit Corridors/Better Bus – In response to TriMet’s proposal to consider funding specific to Better Bus transit improvements, the indicated preference is to consider these investments through Step 2 project applications. Measurement of ETC elements in a proposed project will be included in the Step 2 evaluation methodology.

Coordination of Metro funding sources

As detailed in the memo included with TPAC materials, Metro intends to use the RFFA Step 2 project application and evaluation process in selecting trails projects to be funded through the 2019 Parks and Nature (P&N) bond measure. As RFFA has funded many trails projects and they are a critical part of the region’s Active Transportation network, there is significant overlap with the purpose and intent of the P&N bond measure funding dedicated for trails. By using a single application process, the intent is to lessen the burden of funding applications and processes on local jurisdictions, and to improve the efficiency of funding allocation. It is important to note that trails projects will remain eligible for RFFA funding. Please refer to the attached memo for further details.

Next steps/requested action

Staff is seeking TPAC recommendation of the 2025-2027 RFFA Program Direction to JPACT for their approval.



Memo

Date: May 28, 2021

To: TPAC and Interested Parties

From: Jon Blasher, Parks and Nature Director
Margi Bradway, Planning and Development Deputy Director

Subject: Coordinating trails funding processes

Introduction

The Portland region's system of off-street trails is a critical, well-used and beloved part of achieving our regional vision and policy direction. Historically, millions of dollars of the region's federal funding allocation have supported the development and construction of multiple trails projects, demonstrating their importance. Voters affirmed their support and desire for more trails in the region with the passage of the 2019 Parks and Nature (P&N) bond measure. This measure contained funding specific to support trails projects and continuing to create a well-connected network of trails throughout the region.

With this overall increase both in support and available funding for trails, Metro intends to combine the processes of allocating the 2025-2027 Regional Flexible Funds (RFFA) Step 2 funding and the trail-specific grant funding from the P&N bond measure.

There is up to \$20 million for trails available from the P&N bond funds to be allocated through this process. As in previous RFFA cycles, trails projects remain eligible to be funded with RFFA funds as well.

Metro Council directed staff to look for opportunities to work across departments and leverage resources where possible to achieve Metro overall outcomes. These two funding sources – Planning and Development's (P&D) RFFA funds and the P&N bond funds for trails – have similar goals and priorities. The regional importance of building a well-connected network of trails is demonstrated through policy direction identified in the Parks and Nature System Plan, the Regional Transportation Plan (RTP) and the Regional Active Transportation Strategy.

The main advantages of sharing an application and evaluation process for these funding sources mean that jurisdictional partners can submit one application to be considered for funding from both sources. This reduces workload on applicants. Applicants will not need to wait through two processes to know their project's funding status. And the two funding sources can work together to allow for greater flexibility in how projects are developed and built.

Shared priorities

Both the RFFA and P&N bond funding policy direction are centered in the goals of advancing equity and responding to the challenges facing the climate. Trails projects have a long history of being funded through the RFFA process. They are a critical component of a well-connected, multi-modal transportation system and help to advance the RTP Investment Priorities of Equity, Safety, Climate and Congestion. And they provide important recreational opportunities that contribute to creating livable communities and improve people’s access to nature.

| RFFA Priorities | P&N Bond Criteria |
|-------------------|----------------------|
| Equity | Racial Equity |
| Safety | Climate Resilience |
| Climate (CSS) | Community Engagement |
| Congestion Relief | |

By coordinating these two funding sources, the region can make better, more informed funding decisions that more fully understand and respond to the region’s most urgent needs and community desires.

Eligible activities and requirements by funding program

The two funding programs can fund similar yet not identical activities and have different eligibility requirements. To be eligible for RFFA funds, projects must be included in the Regional Transportation Plan Project List. To be eligible for Parks and Nature Bond funds, projects must be included on the [Regional Trails System Plan Map](#).

Project development, construction, and ADA/accessibility improvement phases are eligible for both funding sources, while capital maintenance is eligible for Parks and Nature Bond funds only. Project development activities include, but are not limited to, feasibility studies, alignment studies, alternatives analyses, master planning, schematic design, design development, construction documents and right-of-way.

The following table provides a side-by-side comparison of the two funding programs, and shows what types of active transportation projects are eligible for each funding program and which regional plan the project must be included in.

| | RFFA | P&N Bond |
|------------------------------------------------------|----------|----------|
| Consistency with regional plans | | |
| Regional transportation plan project list | Required | N/A |
| Regional trails system plan map | N/A | Required |
| | | |
| Eligible active transportation facility types | | |
| On-street bike/ped facilities | Yes | Yes |
| Off street paved trails | Yes | Yes |
| Natural surface trails | No | Yes |
| Water trail improvements | No | Yes |
| | | |
| Eligible project phases | | |
| Project development | Yes | Yes |
| Construction | Yes | Yes |
| ADA/accessibility improvements | Yes | Yes |
| Capital maintenance | No | Yes |

Proposed process

Applicants will complete a common application that will capture information needed for consideration in either funding source category. The call for projects is scheduled to open in November 2021 and closes in February 2022. Prior to the project call, a proposer's workshop will be held to familiarize prospective applicants with the funding purposes, evaluation methodology and application process. This assists applicants in proposing projects that are well-aligned with regional policy objectives and suited for regional funding.

All applications will be reviewed through a single technical evaluation and risk assessment process. The purposes of the RFFA and Trails funds are similar. As such, the technical evaluation will provide project information that is relevant to either funding source. There may be certain policy direction for each funding source that will require additional evaluation criteria specific to that source. In particular, to be funded with the RFFA dollars, a specific trail project must meet federal eligibility requirements.

The technical evaluation will help regional decision makers understand and compare the benefits and potential outcomes of projects proposed to be funded. It will help differentiate which projects are suitable for a specific funding source, or both. A work group comprised of a representative cross section of state and regional agency staff and community leaders will assist in the creation of the technical evaluation measures and will also conduct the evaluation.

The risk assessment will examine the proposed projects for any potential factors that could negatively impact the project being built to the proposed scope, budget or timeline. Information from the risk assessment can lead to applicants adjusting their project proposals to address identified issues. The risk assessment is intended to result in better project proposals and to help the region make fully informed funding decisions. Metro intends to hire a consultant to perform the project risk assessment.

It is recognized that one of the two funding sources may be more appropriate for a specific project. Applicants may indicate which of the sources they prefer, but it is not possible to guarantee the use of a particular source should a project be selected for funding. The determination of which funding source is to be used on a trail project will be informed by several eligibility factors. Examples of

factors to be considered in determining whether a project is eligible to be funded through RFFA or Trails bond dollars may include:

- If the project is primarily located on-street vs. in a dedicated off-street right-of-way
- The types of destinations to which the project improves access (jobs, services, nature, etc.)
- Sources of funding already used on the project (federal or local)
- Unique opportunities that may exist by funding the project from a particular source
- Design elements, such as trail type (paved v. non-paved), intersections with streets or highways, geographical or environmental complexities, etc.

For the Regional Flexible Funds, final project selection and funding determination will be made by JPACT and Metro Council. For the P&N Bond Funds, the Bond Oversight Committee will review the final project list for consistency with the bond measure's policy direction before advancing the project list to Metro Council for final approval. The discussion for the selection process will include opportunities for both groups of decision-makers to review, understand and provide input on all proposed projects prior to final action. Final project selection and adoption by Metro Council is scheduled for Fall 2022.

Next steps

More work is ahead to fully create and describe the combined project solicitation and selection process. In the summer of 2021, Metro staff will consult with coordinating committees, parks and local jurisdiction staff, and other stakeholders in developing a detailed and transparent application and decision-making process, prior to the Call for Projects issued in November 2021.



Metro



DRAFT 2025-2027 Regional Flexible Funds Allocation Program Direction

(Resolution 21-XXXX)

July 2021

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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). Allocating these funds 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 defines performance measures and an investment strategy to ensure progress is made towards creating the envisioned system. In particular, the RTP 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.

JPACT and Metro Council adopted the most recent update of the RTP at the end of 2018. In the three years spent developing the 2018 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 and policymakers, several investment priorities emerged. These priorities implement the 2040 Growth Concept by focusing on "moving people and goods, providing access, and helping to create and connect places." Of these priorities, Metro Council specified four as the main near-term capital and program investment priorities of the RTP: Equity, Safety, Climate and Congestion Relief.¹ These four priorities represent the framework for how funding is to be prioritized through the 2025-2027 RFFA.

Along with adopting the 2018 RTP, JPACT and Metro Council also adopted new modal and topical strategies for Transportation Safety, Freight, Transit and Emerging Technology. These strategies more fully articulate the integrated multi-modal regional transportation system and investments needed to improve the existing system, and complement the Regional Travel Options Strategy (2018), Regional Active Transportation Plan (2014), Climate Smart Strategy (2014) and Regional Transportation System Management and Operations Action Plan (2010). Collectively, these planning policy documents provide guidance for how the region can thoughtfully direct funding through the RFFA process to advance these four near-term investment priorities.

The 2025-2027 RFFA Program 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 in 2011 for the 2014-2015 allocation cycle, which directs funding towards region-wide investments and supports construction of capital projects in specific focus areas.

¹ Metro Ordinance 18-1421

Funding allocated in Step 1 represents the region’s ongoing commitments to fund portions of the transportation system that are critical to following through on RTP-identified goals and objectives. Step 1 investments support federal, state, and regional requirements for building a multi-modal transportation system, meeting federal air quality regulations, and reducing greenhouse gas emissions from vehicles, per mandates from the state.

New in this RFFA cycle is an updated Step 2 capital projects category. A series of three workshops were held in March and April 2021 to gather input from regional stakeholders on what updates they felt were critical to addressing the current needs of the transportation system. As the current two-step funding approach has been in use since 2011, stakeholders indicated that the region should consider updating the existing Step 2 project funding categories: Active Transportation and Complete Streets, and Freight and Economic Development Initiatives. In response, a single capital projects category is adopted through this Program Direction that focuses on projects that improve the system in multiple ways.

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



Six desired outcomes for greater Portland – Adopted by the Metro Council in 2008.

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 identifies 11 specific goals, 43 related objectives and four priorities that define the region’s aspirational system and describes a strategy for making near-term investments intended to make progress towards that system.

RTP Chapter 2 lays out this vision and includes nine system performance targets to provide a basis for measuring expected performance of the plan in the long-term. Chapter 6.2 provides specific priorities to guide investments to demonstrate the region’s actions are following its commitments

and demonstrate progress towards the performance targets. Projects funded through the 2025-2027 RFFA are to align with the RTP investment priorities identified in Chapter 6.2.

These near-term investment priorities emerged from a three-year discussion and identification of the region's most urgent transportation needs by regional policymakers. 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 four RTP Investment Priorities are:

- **Equity:** Reduce barriers and disparities faced by historically marginalized communities, particularly for communities of color and people with low income
- **Safety:** Reduce fatal and severe injury crashes to move the region as quickly as possible toward Vision Zero, particularly for communities of color and other historically marginalized communities
- **Climate Change:** Reduce greenhouse gas emissions from cars and small trucks to reduce the impacts of climate change, particularly for communities of color and other historically marginalized communities
- **Congestion:** Manage travel demand and increase use of travel options to make travel more reliable on the region's busiest roadways, particularly for communities of color and other historically marginalized communities

Figure 1: 2018 RTP Investment Priorities



The 2018 RTP determined that the Six Desired Outcomes could best be achieved by making transportation investments focusing on these four priorities. The first of seven key investment recommendations states the following:

“Make more near-term progress on key regional priorities – equity, safety, travel options, Climate Smart Strategy implementation and congestion. Advance projects that address these outcomes to the 10-year list to make travel safer, ease congestion, improve access to jobs and community places, attract jobs and businesses to the region, save households and businesses time and money, and reduce vehicle emissions.”²

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 in Table 1. A complete description of the performance targets is found in Chapter 2 of the 2018 RTP.

REGIONAL TRANSPORTATION FINANCE APPROACH

Since May 2009, the region has followed a regional finance approach to direct how the transportation needs of the region are to be addressed by existing or potential transportation funding sources. JPACT developed this regional finance approach to provide 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. Additionally, as other available funding opportunities have emerged since the 2010-2013 MTIP cycle, the regional finance approach has been a starting point for informing a regionally coordinated set of priorities to pursue

Table 1: Regional Transportation Plan Performance Targets

| | | |
|---|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 |

² 2018 RTP, Chapter 6, Table 6.2

those other funding opportunities. Recognizing the regional transportation finance approach has influenced the development of a coordinated regional list of capital investment priorities, tailored to the context of the funding opportunity – such as the 2020 regional transportation funding measure and the congressional request of regional priorities for appropriations earmarks – the 2025-2027 RFFA Program Direction follows the core principles of the regional finance approach.³

Uses for regional flexible funds, as defined in the regional transportation finance approach include:⁴

- Active Transportation
- Arterial Expansion, Improvements, and Reconstruction⁵
- Throughway Expansion⁶
- High-capacity Transit Expansion
- Transportation System Management and Operations
- Regional Travel Options
- Transit Oriented Development

REGIONAL FLEXIBLE FUNDS 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.
6. Encourage the application of projects that efficiently and cost-effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an areas stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.

³ See Metro Council Resolution 16-4702.

⁴ Most recent regional transportation finance approach is from the 2021-2024 MTIP policy.

⁵ Limited to arterial freight facilities for ITS, small capital projects, and project development.

⁶ 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.

9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

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.

2025-2027 REGIONAL FLEXIBLE FUNDS STRUCTURE

The 2025-2027 RFFA follows the two-step framework the region has followed starting with the 2014-2015 allocation process. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives.

A total of \$142,350,000 is projected to be allocated in the 2025-2027 federal fiscal years. Funding amounts for each of the funding areas is as shown in Table 2 below.

Table 2: Total 2025-2027 Regional Flexible Funds

| | |
|-------------------------------------------------------------------------|----------------------|
| Step 1A: Transit & Project Development Bond Repayment Commitment | \$65,280,000 |
| Step 1B: Region-wide Program Investments, Planning | \$35,820,186 |
| Step 2: Capital Investments | \$41,249,814 |
| Total 2025-2027 RFFA* | \$142,350,000 |

*May be adjusted after input from TPAC on the financial forecast.

Step 1 consists of two funding focus areas. Step 1A repays bonds issued to develop and construct key elements of the region’s multi-modal system. Step 1B targets funding towards key system investment needs, ensures the region has capacity to follow federal planning requirements and can respond to and plan for future system opportunities.

Step 2 provides capital project funding to develop and construct improvements to the regional system. The focus of these project funds is on completing gaps or improving the active transportation system and making strategic improvements to support a healthy economy and help freight move more easily.

Step 1A – Bond Repayment Commitments



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. Funding to be allocated in the 2025-2027 RFFA cycle is highlighted in blue.

Table 3: Regional bond repayment commitment schedule

| Federal Fiscal year | Amount (millions) |
|---------------------|-------------------|
| 2025 | \$21.78* |
| 2026 | \$21.76* |
| 2027 | \$21.74* |
| 2028 | \$17.28 |
| 2029 | \$17.26 |
| 2030 | \$17.24 |
| 2031 | \$17.22 |
| 2032 | \$17.19 |
| 2033 | \$17.17 |
| 2034 | \$17.15 |

* Amount due in each of the three years of the 25-27 RFFA cycle

Bond repayment commitments for the 2025-2027 RFFA cycle are:

Bond Repayment Commitment **\$65,280,000**

Step 1B – Region-wide program investments, MPO and regional planning

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/Safe Routes to School** – 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 are reviewed in each RFFA cycle. A report was given to TPAC in their May 2021 meeting. The report provides 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, included as part of the strategy demonstrating the region can meet state mandated greenhouse gas reduction targets)
- 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
- Future activities – description of work to be conducted over the next three years
- Additional opportunities – description of priorities or activities the program would pursue given additional resources

Region-wide program investments for the 2025-2027 RFFA cycle are:

| | |
|-----------------------------------------------------------------|---------------------|
| Regional Travel Options/Safe Routes to School (RTO/SRTS) | \$11,102,371 |
| Transit Oriented Development (TOD) | \$11,806,111 |
| Transportation System Management and Operations (TSMO) | \$ 5,943,432 |

c. MPO, Freight, Economic Development, Corridor and System Planning

Regional funds are used to support 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.

Planning commitments for the 2025-2027 RFFA cycle are:

| | |
|---------------------------------------|--------------------|
| MPO Planning (in lieu of dues) | \$4,730,789 |
| Corridor and System Planning | \$2,237,483 |

Step 2 – Capital Investments

The 2025-2027 RFFA program direction incorporates a new Step 2 capital projects category. This new category updates the previous modal categories and funding targets in favor of a single category but maintains the same focus on improving the region’s active transportation network and supporting freight mobility and economic outcomes.

Existing practice is that JPACT and Metro Council desire that a strategic approach is followed to allocating Step 2 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 2025-2027 RFFA and following up on the input received from the 2022-24 RFFA retrospective, a series of stakeholder workshops was convened to advise JPACT and TPAC on how the regional funding could be directed in a manner that best reflects 2018 RTP investment priority direction. Participants were asked to provide proposed adjustments or changes to the existing RFFA program direction to better align it with RTP policy.



Through the workshop process participants indicated continued support for investment in projects that improve the region's active transportation system and support the region's economy, as has been the RFFA focus in prior funding cycles. But they also indicated that more flexibility in how projects could be conceived and evaluated could result in projects that achieve multiple outcomes and lead to better outcomes regarding the four RTP investment priorities and the nine performance targets.

Project development approach and technical evaluation criteria

Workshop input indicated support to eliminate the Step 2 project categories of Active Transportation/Complete Streets and Freight/Economic Development and their associated funding targets (75%/25%). Participants supported a process that allows projects to be proposed of any mix of mode and function improvements identified as appropriate for the regional flexible funds through the Regional Transportation Finance Approach and that best advance the RTP Investment Priority categories.

The criteria shown below in Table 4 (center column) will be used in the technical evaluation for proposed Step 2 projects. The criteria illustrate how the region is investing in its stated priorities. Projects that perform well in the technical analysis will demonstrate significant and measurable improvements in each of these criteria.

Table 4: Step 2 Project Technical Evaluation Criteria

| 2018 Regional Transportation Plan Priorities ⁷ | Outcome(s) Being Measured (Project Criteria) | Performance Measures to Consider ⁸ |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Equity</p> <p>Reduce barriers and disparities faced by historically marginalized communities, particularly for communities of color and people with low income.</p> | <p>Increased accessibility</p> <p>Increased access to affordable travel options</p> | <ul style="list-style-type: none"> • Access to opportunity (jobs, school and other destinations people need to thrive) • Access to transit • Access to active transportation network/system completeness in Equity Focus Areas, near transit, and/or on high injury corridors and TSMO and TDM programs |
| <p>Safety</p> <p>Reduce fatal and severe injury crashes to move the region as quickly as possible toward Vision Zero, particularly for communities of color and other historically marginalized communities.</p> | <p>Reduced fatal and serious injury crashes for all modes of travel</p> | <ul style="list-style-type: none"> • System completeness of bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs • VMT/capita • Multi-Modal Level of Service, LTS, ped crossing index |
| <p>Climate Change</p> <p>Reduce greenhouse gas emissions from cars and small trucks to reduce the impacts of climate change, particularly for communities of color and other historically marginalized communities.</p> | <p>Reduced emissions from vehicles</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • VMT/capita • System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials and/or on high injury corridors and TSMO and TDM program |
| <p>Congestion</p> <p>Manage travel demand and increase use of travel options to make travel more reliable on the region's busiest roadways, particularly for communities of</p> | <p>Increased reliability</p> <p>Increased travel efficiency</p> <p>Increased travel options</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • Travel time • Travel time reliability • VMT/capita • Duration of congestion • Volume/capacity ratio |

⁷ Summarized from 2018 RTP Regional Transportation Plan

⁸ Final RFFA performance measures will be developed prior to the Call for Projects in November 2021

| 2018 Regional Transportation Plan Priorities ⁷ | Outcome(s) Being Measured (Project Criteria) | Performance Measures to Consider ⁸ |
|-----------------------------------------------------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| color and other historically marginalized communities. | | <ul style="list-style-type: none"> System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs |

Further staff work will take place during the summer of 2021 to complete the Step 2 performance measures and provide additional guidance to applicants prior to the Call for Projects in November 2021. Performance measures listed above are examples and may not completely reflect the final measures. Metro will convene a technical evaluation work group to help develop performance measures and conduct the technical evaluation. The work group will be comprised of regional agency staff and community members with expertise in transportation.

The technical analysis will measure how completely and thoroughly proposed projects address all of the above criteria. The analysis will include both quantitative and qualitative measures to provide decision-makers with a well-rounded understanding of the proposed project’s attributes and improvements to the regional system.

Depending on the proposed projects submitted for consideration, additional emphasis in evaluating projects may be required to ensure there is an adequate pool of projects that will be eligible to utilize the different sources of federal funding allocated to projects in the RFFA/MTIP process, particularly the use of Congestion Mitigation/Air Quality (CMAQ) funds.

TOTAL Step 2: **\$41,249,814**

STEP 2 PROJECT SELECTION PROCESS

All project funding proposals received in the Step 2 Capital Project category will be considered for selection using the following process:

Proposer Workshop – Prior to the Call for Projects, Metro will hold a proposer’s workshop(s). The purpose of this is to clarify the application and evaluation approach to help proposers prepare thorough project proposals that fully demonstrate project benefits and system improvements. The desired outcome is to ensure proposers understand how criteria will be used to evaluate their project, and that they understand what factors will be reviewed in determining the thoroughness of the project’s scope, budget and timeline.

Call for Projects – Metro will issue the call for project proposals in November 2021. Applicants will have approximately four months to complete proposals, which are due in February 2022.

Technical Evaluation – A work group will review and rate the submitted proposed projects. Proposals will receive a technical score reflecting how well the project addresses the 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 2025-2027 timeframe.

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

The Technical Evaluation and Risk Assessment processes will occur concurrently in March and April 2022.

Public Comment – Following issuance of the Technical Evaluation and Risk Assessment reports, Metro will conduct a 30-day public comment period in May 2022, 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 TPAC action to recommend a package of projects to JPACT.

TPAC/JPACT Discussion and Action – Following the above information gathering steps, TPAC will be asked to consider and discuss 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 in September 2022.

Council Action – Metro Council will consider and take action on the JPACT-referred package in October 2022.

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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.

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Date: June 4, 2021
To: Transportation Policy Alternatives Committee and Interested Parties
From: Elizabeth Mros-O'Hara, RCPS Project Manager
Subject: Regional Congestion Pricing Study -Review of Draft Report and Draft Resolution

Purpose

This meeting is to:

1. Provide an update on the study findings,
2. Provide a summary of key takeaways from the Congestion Pricing Expert Review, and
3. Review draft recommendations for policy makers and future owners and operators to consider.

The study findings and Expert Review summary will be included in the Regional Congestion Pricing Study final report and will be presented in a resolution by JPACT and Metro Council for acceptance in July.

Request to TPAC

Provide input and comment on the congestion pricing updated findings and draft recommended considerations for policy makers and future owners/operators based on the findings.

New Information and Updated Key Findings

Expert Review Panel

Metro engaged congestion pricing experts with extensive experience in policy, project/program development, implementation, equity considerations, funding, legal considerations, and political/public acceptance to review the study, culminating in an Expert Review Panel webinar held on April 22, 2021. Panelists included Clarrissa Cabansagan from TransForm, Daniel Firth from C40, Rachel Hiatt from San Francisco County Transportation Authority, Sam Schwartz from Sam Schwartz Engineering, and Chris Tomlinson from the Georgia Regional Transportation Authority and the Atlanta-Region Transit Link Authority. They reviewed and commented on the study methodology and findings and shared lessons learned from their extensive work around the world: in San Francisco and the Bay Area, Vancouver, B.C., Atlanta, New York City, Stockholm, and London, among other locations. The webinar was moderated by Jennifer Wieland, Managing Director at Nelson\Nygaard, and attracted approximately 120 viewers. The recording of the webinar is available on the project webpage at www.oregonmetro.gov/regional-congestion-pricing-study

Expert Review Panel Key Takeaways

There were several highlights from the panel's independent review of Metro's work, and from the webinar discussion:

- The panel found the methods used in the RCPS study to be sound, logical, and consistent with other places that have implemented congestion pricing.
- The panel found the findings from the study to be consistent with their experiences with congestion pricing projects' performance elsewhere.
- The panel advised project implementers to take the time up front to confirm the project purpose, and then focus on fulfilling that purpose, with an understanding that the design of a congestion pricing program could vary depending on the purpose it is being designed for.
- The panel discussed the critical importance of centering equity, and the very real and unintended consequences that can arise from not doing so.

- The panel recommended reaching out broadly to all stakeholders – and recognizing the diversity of different stakeholder groups – understanding that not all groups will be supportive, and that public acceptance of the effort will change over time.
- The panel talked about the differences between congestion pricing and transit-oriented development in urban, suburban, and rural contexts. Every place is unique, and it is critically important to customize the pricing program to meet a region’s unique needs. That said, pricing has been shown to be successful in all types of settings at improving mobility and addressing other priorities.

Updated Summary of Key Findings

Context

The key findings shared with TPAC at the February workshop have been augmented to include some additional findings based on research and analysis on implementation and equity considerations, as well as input from our experts in pricing and equity (**Attachment 1: Implementation Considerations Technical Paper** provides detail on implementation considerations for the four different types of congestion pricing).

Many of the RCPS findings are still based on outcomes from modeled scenarios that were not adjusted to address concerns that the modeled outcomes show for the scenarios. The study scenarios provide a general assessment of performance and do not take into account potential for discounted charges for key groups or targeting revenue investment to address areas of concern that arise from the analysis. Equity of a pricing program is largely determined by three things:

1. who is receiving the benefit of more reliable/better travel options,
2. who is being charged and how much, and
3. where and how the revenues are invested.

A proposed project would be expected to address issues around congestion, safety, climate, and equity—considering targeted discounts, project design, and/or funding investments that mitigate concerns. The RCPS findings are NOT iterative and do not address the concerns revealed but point to areas for project owners/operators to keep in mind when developing a pricing project.

Updated Big Picture Findings from the Modeled Scenarios and Research

All four types of pricing would to help address congestion and climate priorities.

- All eight scenarios reduce the drive alone rate, vehicle miles traveled, and greenhouse gas emissions.
- All scenarios increase daily transit trips. (Roadway A has a small increase).
- The projected improvements are comparable to or exceed those of 2018 RTP scenarios (even those with much higher investments in transportation projects).

Overall regional transportation costs and individual traveler costs vary by scenario.

- All eight scenarios increase the overall cost for travel for the region, but some scenarios spread the costs widely while others concentrate them on fewer travelers. Those that spread the costs also have the highest overall cost for the region.

Geographic distribution of benefits and costs varies by scenario.

- Roadway scenarios reduce delay on freeways, but increase delay on arterials relative to the Base Scenario.
- Corridor scenarios create delay around the perimeter of the cordon boundaries with vehicles avoiding paying the charge.
- Distribution of benefits and costs have implications for where fee discounts and investments from revenues should be targeted.

There are tradeoffs for implementing pricing scenarios.

- Higher overall transportation costs equal higher transportation revenues. Revenues must be high enough to:
 - pay for implementation and operation of a program/project
 - address equity and safety impacts that may be introduced
- Vehicle miles traveled scenarios have positive results for all eight summary metrics for congestion, climate, and equity, but also have the highest overall travel costs for the region. However, the costs are spread widely as they are shared by all drivers.
- Revenue potential for the different congestion pricing types is by far the highest for Vehicle Miles Traveled scenarios, then Roadway scenarios at about half that amount, followed by Cordon and Parking scenarios at about half of the Roadway scenarios.
- While congestion pricing may introduce new complexities, our current transportation funding system will not achieve the region's urgent climate and equity goals. Current funding and spending structures are regressive and reinforce inequity. In addition, the gas tax does not generate enough money to pay for planned projects.

Implementation considerations vary by the type of congestion pricing.

- Implementation of a pricing tool depends on technical tools available, need for enforcement, public acceptance, governance structures/policies/legal considerations, ease of use, equity considerations, and financial feasibility.
- Based on today's technology and infrastructure parking pricing is the easiest to implement.
- VMT, roadway pricing, and cordon pricing are complicated by the complexity of tolling authority and potentially multiple jurisdictions involved.
- Technology infrastructure costs are highest for roadway pricing.
- Implementing pricing to maximize performance and to address equity and safety requires detailed analysis to understand who/where the benefits and costs occur.
- As modeled VMT has the highest revenue potential, followed by Roadway (about half of VMT), and then Cordon and Parking (about half of Roadway).

Equity can be built in Congestion Pricing Program

- The current transportation funding system results in inequity.
- How a congestion pricing program is designed is the number one determinate of whether it can improve equity. For example, the same project charging \$1.00 per mile to drive on a roadway during the peak can either improve or reduce equity depending on the project parameters.
- Pricing programs can improve equity in three ways:
 - Building affordability into the program
 - Provide discounts or exemptions for key from paying
 - Revenue can be focused on equity outcomes
 - Invest in key neighborhoods or roadways
 - Focus on transit, sidewalks, bike lanes
 - Invest in senior and disabled services
 - Targeting pricing benefits to key locations
 - Mobility improvements and air quality

Attachment 2: Updated Summary of Key Findings provides more detail on findings by modeled scenario and pricing type. It includes some additions to the findings shared in February with TPAC and a table comparing performance by RTP priorities.

Considerations for Policy Makers and Future Owners/Operators

The RCPS report will have recommended considerations based on the technical analysis, research, best practices, and feedback from congestion pricing and equity experts, as well as TPAC, JPACT, and Metro Council. TPAC's feedback will be used to finalize the RCPS report and the recommendations.

TPAC members will be sent a draft of the report within the next two weeks for review and comment. The following recommended considerations are for TPAC discussion and comment at the June 4th meeting.

DRAFT Summary of Recommended Considerations

For Policy Makers

- Congestion pricing has been used in multiple cities to improve mobility and reduce emissions. Our study demonstrated that these tools could work in the Portland Region with our land use and transportation system.
- Congestion pricing has a strong potential to help the Greater Portland Region meet the priorities outlined in its 2018 Regional Transportation Plan, specifically addressing congestion and mobility; climate; equity; and safety.
 - Technical analysis showed that all four types of pricing analyzed improved performance in these categories
 - Best practices research and input from experts showed there are numerous tools for maximizing performance and addressing unintended consequences.
- Carefully consider the specifics of how the benefits and costs of congestion pricing impact different geographic and demographic groups.
- In fact, optimizing for one priority or another could lead to different outcomes. Meaning, optimizing for mobility, for revenues, for equity – could lead to the selection of a different congestion pricing strategy and design of a program.
- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region.
- Similarly, if not done thoughtfully, congestion pricing could harm minority and low-income communities, compounding past injustices.
- It is therefore imperative that there is clarity around what goals the region and implementing agencies want to achieve, as well as the desired values and outcomes, from the very beginning of any congestion pricing efforts.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at a **regional scale** and follow regional priorities as pricing programs have benefits and impacts across the region.

For Project Owners/Operators

- Congestion pricing has been shown to address issues of mobility, greenhouse gas emissions, equity, and safety where it has been applied.
- The success of a project or program is largely based on “how” it is developed and implemented.
- Methodology is important – analysis needs to be detailed to understand how to **maximize benefits** (mobility, shift to transit, less emissions, better access to jobs and community places, and safety) and **address unintended consequences** (diversion and related congestion on nearby routes, slowing of buses; potential safety issues, and equity issues).
- Meaningful engagement and an extensive outreach campaign is required to develop a project that works and will gain public and political acceptance.
- A pricing project should build equity, safety, and affordability into the project definition so a holistic project that meets the need of the community is developed rather than adding “mitigations” later.
- Ongoing monitoring of performance is necessary to adjust and optimize a program once implemented.

Questions for TPAC

- What questions or comments do TPAC members have regarding the updated findings?
- What questions or comments do you have about the draft recommendations?
- Are there specific areas where you want more information?

Next Steps

Staff will incorporate feedback from the TPAC on the findings and Discussion Draft Recommendations for Consideration. Staff will complete the Draft RCPS report and send it to TPAC for comment in the next two weeks. Metro staff will present to JPACT and Metro Council on the findings Draft Recommendations in June. Staff will incorporate comments from TPAC, JPACT, and Metro Council to complete the report and recommendations. In July, staff will ask JPACT and Metro Council to adopt the report findings and recommendations with a resolution. A final report will be released after that.

Table 2 outlines the remaining schedule for the RCPS.

Table 2: Regional Congestion Pricing Study Schedule

| Activity | Timeframe |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| <i>Create draft findings memorandum- include feedback from TPAC Workshop, Equity Groups, and research from consultant team and staff</i> | <i>April 2021 - Completed</i> |
| <i>Share draft findings with regional leadership</i> <ul style="list-style-type: none"> • <i>Metro Council Briefing</i> • <i>JPACT Briefing</i> | <i>April 15, 2021 - Completed</i> |
| <i>Expert Review Panel Discussion</i> <ul style="list-style-type: none"> • <i>Congestion pricing experts with experience on pricing projects in different parts of the world weigh in on our findings and provide insights from work done elsewhere</i> | <i>April 22, 2021 - Completed</i> |
| Revise/incorporate feedback and refine analysis with feedback from TPAC, JPACT, and Metro Council. Return to TPAC, JPACT, and Metro Council with DRAFT Report and DRAFT findings and Recommendations for discussion <ul style="list-style-type: none"> • TPAC presentation --June 4, 2021 • JPACT presentation-- June 17 ,2021 • Metro Council presentation--June 22, 2021 | May - June 2021 |
| Staff revises/incorporates feedback and creates final report and resolution reflecting input from TPAC, JPACT, and Metro Council. | June 2021 |
| Metro Council and JPACT accept the final report and adopt a resolution on the findings. <ul style="list-style-type: none"> • JPACT meeting--July 15 ,2021 • Metro Council meeting--July 22, 2021 | July 2021 |
| Release final regional congestion pricing report | July 2021 |

Attachments:

Attachment 1: Implementation Considerations Technical Paper

Attachment 2: Updated Summary of Key Findings

APPENDIX A: IMPLEMENTATION CONSIDERATIONS

TECHNICAL PAPER

Introduction

With a transportation network already stressed and congested, the Portland region is anticipating worsening mobility conditions in the coming years with the projected economic and population growth. The region has long recognized that traditional strategies to “build” its way out of congestion will not be effective. Therefore, Metro is examining the feasibility of using congestion pricing as a potential *new* strategy to improve mobility with the goals of addressing congestion, climate change, equity, and safety.

Pricing Scenarios

Four congestion pricing scenarios are being analyzed as part of the Metro Congestion Pricing Study. Each of the four have benefits and disbenefits, and all are likely to reduce congestion, with varying degrees of success and acceptance by the public. Any one of these four scenarios could be implemented separately or in some combination.

1. Vehicle Miles Traveled (VMT)
2. Cordon Pricing
3. Parking Pricing
4. Roadway Corridor Pricing

Pricing Technologies

There are a range of enabling technologies that could support the scenarios above.

1. **Tolling technologies** – Modern electronic toll collection systems used on toll roads are highly automated using Automatic Vehicle Identification (AVI) and Automatic License Plate Reader (ALPR) technologies, which identify vehicles without impeding traffic flow. Typically, AVI antennas mounted over roadways read transponders in vehicles to identify those with pre-paid toll accounts. ALPR cameras mounted overhead capture images of vehicle license plates to identify those without a transponder. The toll system uses the images to match a vehicle to a pre-paid account and charge the proper toll or, in the event no account is detected, send the vehicle owner a post-paid invoice or a violation notice.
Applies to cordon pricing and roadway pricing scenarios
2. **Mobile apps** – Several companies are using cell phone-based technologies, such as GPS and 5G wireless positioning features, to determine vehicle location and assess tolls. Apps on cell phones can send a vehicle license plate number to reconcile the vehicle with the toll due that is captured by a roadside toll system. In addition, cell phone apps can also provide travelers with pricing information and reduce the need for electronic signs.
Applies to cordon pricing and roadway pricing scenarios

- 3. Connected Vehicles (V2X)**– Despite the lack of a Federal mandates for the installation of Dedicated Short-Range Communications (DSRC) in new vehicles, many vehicle manufacturers are pressing ahead with technologies to let their vehicles communicate directly with other vehicles and roadside infrastructure. For instance, Ford is planning to equip all of their 2022 vehicles with 5G network communication. Existing vehicles without built-in connectivity could be equipped with retrofit kits. These connected vehicles present opportunities to leverage their communications capabilities to automatically toll vehicles.
Applies to cordon pricing and roadway pricing scenarios

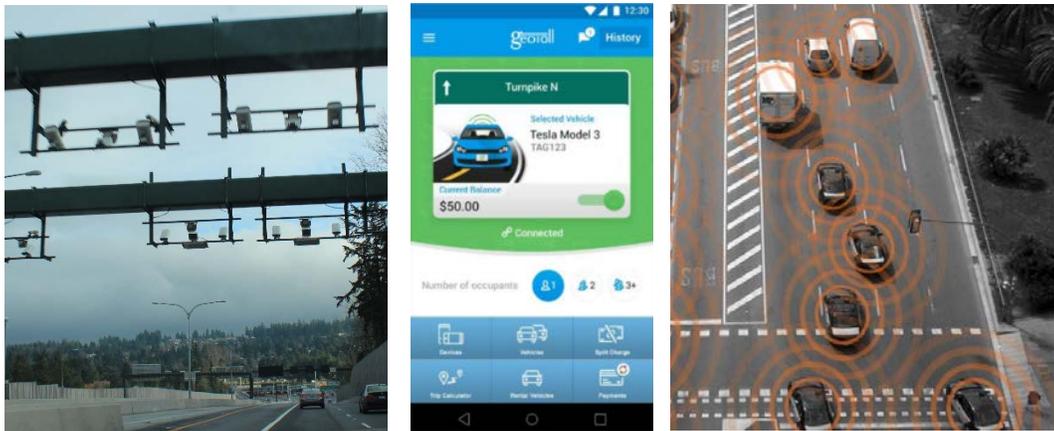


Figure 1 Overhead transponder reader antennas and ALPR cameras at a toll gantry (left), example of a toll payment app (center), connect vehicles can communicate with other connect vehicles and roadside infrastructure (right).

- 4. OReGO Technologies** –OReGO currently uses devices that connect into a vehicle’s On-Board Diagnostic (OBD)-II ports to get vehicle information and odometer reads, then transmit it wirelessly back to the VMT account manager. Customers can choose between GPS enabled OBD-II device, which provide value added features, or a non-GPS version to alleviate tracking privacy concerns.
Applies to VMT scenarios
- 5. Self-reporting** – Alternative methods are being developed for capturing odometer data from vehicles without the need of an OBD-II device, especially since some electric vehicles no longer have them. New technologies include using Odometer Image Capture (OIC), where cell apps can capture vehicle odometer reads through a picture. Other methods rely on vehicle owners manually logging mileage online periodically. These self-reporting methods are being trialed in various states that are piloting VMT programs.
Applies to VMT scenarios
- 6. Parking Payment Systems** – Advancement in on-street and off-street parking payment technologies has improved significantly within the past decade. Mobile payment apps and smart sensors have revolutionized the ability for parking operators to dynamically price and manage parking inventory. In general, parking payment systems have largely automated how parking operators can collect payments. This growth in payment systems coupled with existing taxing ability for government entities to collect from parking operators will allow Metro to more easily impose and collect congestion pricing fees.
Applies to parking pricing scenarios

Implementation Considerations

Implementation is key to feasibility – we need to understand the implementation considerations of each technology as a way to further understand the feasibility of the four congestion pricing scenarios. In the following sections, we address the implementation of technology, enforcement, cost, policies/legal, and ease of use for the public. A summary matrix is included to assess how these implementation topics relate to Metro’s four scenarios.

1. **Technology** – Several considerations are vital to implementation of technology.
 - a. *Technology Maturity* - Deploying existing technologies will likely be less expensive to implement and reduce scheduling risks compared to deploying emerging or in-development technologies. Implementing existing technologies does need to be weighed against the risk of the technology becoming obsolete in the near future or being vulnerable to future market disruptors.
 - b. *Physical Roadside Presence* – The physical footprint of technologies will be important in urban environments where space and visual aesthetics are at premium. For instance, a typical tolling system requires overhead mounted antennas to effectively read transponders and to capture license plates would need to be installed throughout the corridors to provide effective compliance.
 - c. *Intrusiveness* – The more the technology requires the public to do something the more difficult it will be for the technology be adopted and for pricing to be applied accurately and reliably. For instance, a technology that requires customers to download an app and track mileage manually would be less effective than a technology that captures license plates and automatically sends a bill to a customer.
 - d. *Compatibility with Other Pricing Programs* – Keeping in mind coordination with other pricing programs will go a long way towards creating a more seamless customer experience for travelers. In particular, ODOT is implementing tolling on Interstates in the Portland regions so adopting common technologies and payment system may be advantageous to reduce duplicative efforts and provide savings through economies of scales. The Hop regional transit fare program and various private parking payment systems are other programs that need to be kept in mind.
2. **Equity** – Selection of particular technologies and methodologies for pricing should take into account impacts on different demographic and income groups in the region. Expensive or complex pricing methods may not only unfairly burden lower income travelers and create barriers to entry for them, but could also cause these groups to be punitively treated as violators due to their lack of access to the proper technologies. The overall customer experience from how travelers enroll, pay, and use priced facilities should also be carefully considered and steps taken to reduce undue impacts. For example, paying tolls should allow those without access to traditional banking services to be able to use alternative payment methods, such as cash payment kiosks at local stores.
3. **Enforcement** – Enforcement entails balancing revenues lost due to scofflaws, perception of enforcement effectiveness by the public, and the cost of the enforcement itself. Striving for 100% enforcement may be cost prohibitive, but not investing enough would upset paying customers and reduce revenues. In addition some pricing methods, such as mobile apps are great for paying customers, but do nothing for catching and charging drivers without the apps. So, a layered, multiple technology approach to enforcement may be needed.

4. **Cost** – Selection of pricing scenarios and technologies should also take into consideration both the upfront capital cost of implementation and ongoing operational costs to evaluate overall lifecycle costs. Cost should also be examined in context of potential revenues raised. In addition, funding sources for capital and operational costs could also influence the pricing technology and delivery method selected. For example, the region may consider a Public Private Partnership delivery method to take advantage of private financing.
5. **Policies/Legal** – Consideration must be made for the need to secure authorization to implement any congestion pricing program, specifically the powers to impose a price and to enforce it. A more thorough legal is needed beyond these insights:
 - a. *VMT authority* – The current OReGo program’s authority is covered under ORS 319.883-.947. Privacy of customer data is also explicitly protected under ORS 319.915. However, the regulations only make VMT voluntary and does not allow imposing a mandate. Therefore, violation regulations only cover misreporting of mileage by voluntary VMT program participants.
 - b. *Tolling/Cordon authority* – At the State level, tolling of roadways are covered in ORS 383.001-.075, where the Oregon Transportation Commission has the power to approve toll on any “highway” in Oregon, per ORS 801.305 (all public roads in Oregon). Privacy of customer data is also explicitly protected under ORS 383.075. Oregon regulations does specifies the need for tolling compatibility between Oregon and Washington (ORS 383.014). At the Federal level, 23 U.S.C. 129 stipulates tolling of Interstates is limited to new highways and new lanes added to existing Interstate highways, provided the number of toll-free lanes are maintained. However, the opportunity to toll can be granted as exceptions under the Interstate System Reconstruction and Rehabilitation Pilot Program (ISRRPP) (FAST Act Section 1411 (c)).
 - c. *Parking pricing* – The ability to raise parking fees for congestion pricing purposes is assumed to need authorization from local jurisdictions.
6. **Customer Ease of Use** – Widespread adoption of technologies in already deployed in the region, such as the OReGO program, could reduce costs and increase customer convenience. The more automated payments and streamline business rules are made the easier it is for the public to participate, contrasting to methods that require more frequent inputs such as manually tracking mileages which would make compliance more difficult.

Table 1. Ease of implementation of the four pricing scenarios under consideration

| Scenarios | Method of Pricing | Technology | Enforcement | Cost | Policies/Legal | Ease of Use |
|------------------------|------------------------------------------------------------------------------------------------------|-----------------------------------------|------------------------------------------------------------------|------------------------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------|
| VMT | <ul style="list-style-type: none"> • OReGo OBDII port technologies | Existing technology | Cannot enforce with out of state drivers | Need to deploy on all vehicles | Need to mandate VMT for all OR vehicles, privacy concern | Already deployed |
| | <ul style="list-style-type: none"> • Self-reporting | Need to develop self-reporting system | Relies on honor system, cannot enforce with out of state drivers | Cost of developing self-reporting system and ongoing administrative costs | Need to mandate VMT for all OR vehicles | Depends on complexity and frequency of self-reporting |
| Cordon Pricing | <ul style="list-style-type: none"> • Tolling technology | Existing technology | Pursuit registered owner with license plate | Upfront construction costs | Need tolling authority | Requires setting up toll accounts |
| | <ul style="list-style-type: none"> • Mobile apps | Existing technology | Needs to be coupled with roadside enforcement | Minimal development costs, operational costs depend on enforcement approach | Need tolling authority, privacy concerns | Minimal effort to download and sign up |
| | <ul style="list-style-type: none"> • Connected vehicles | Not universally available nor installed | Needs to be coupled with roadside enforcement | Require new infrastructure to support | Need tolling authority, privacy concerns | Requires setting up toll accounts |
| Parking Pricing | <ul style="list-style-type: none"> • Raise prices using existing paid parking systems | Existing technology | Using existing means of parking enforcement | Mainly administrative costs | Leverage existing parking fee/taxation frameworks | No change in paying method |
| Roadway Pricing | <ul style="list-style-type: none"> • Tolling technology | Existing technology | Hard to enforce on arterial roads | Significant infrastructure cost due to frequency of tolling locations needed | Need tolling authority | Requires setting up toll accounts |
| | <ul style="list-style-type: none"> • Mobile apps | Existing technology | Needs to be coupled with roadside enforcement | Significant infrastructure cost | Need tolling authority, privacy concerns | Minimal effort to download and sign up |
| | <ul style="list-style-type: none"> • Connected vehicles | Not universally available nor installed | Needs to be coupled with roadside enforcement | Require new infrastructure to support | Need tolling authority, privacy concerns | Requires setting up toll accounts |
| | Legend: | Easy | Moderate | Difficult | | |

Cost and Revenue Considerations

The cost estimation of a congestion pricing scenario is dependent on which method of applying pricing is employed. The first component of cost estimation, Capital Expenditures (CapEx), entails the cost to initially implement a scenario's method of pricing. CapEx is heavily influenced by the maturity of technology available, the ability to leverage an existing pricing program (i.e. ODOT's OReGo Road User Charging), and the physical footprint of equipment that needs to be deployed. The second component of cost estimation is Operational Expenditure (OpEx), the ongoing cost to administer and maintain the scenario's method of pricing. OpEx is dependent on the ability to leverage an existing pricing program if available, the cost of handling transactions, and the volume of transactions generated.

Therefore, cost estimations range considerably for the congestion pricing scenarios and their specific methods of pricing. The following is a summary of scenarios from the least expensive to the most expensive.

- **Parking Pricing** – Least expensive to deploy and operate since it can readily leverage existing priced parking technology in use. As long as the congesting parking rates structures are simple and not dynamically set, most of the cost will be staffing to ensure fees are correctly administered and collected. Although costs are low, it is also a scenario with low revenue potential as well.
- **VMT** – Moderately costly, the VMT scenario benefits from the ability to build on Oregon DOT's existing OReGO road user charge program. Technology and administration has already been deployed to collect fees and that technology could be scaled up to expand VMT to the entire region. The main cost for VMT is equipping vehicles and administering the program.
- **Cordon Pricing** – Depending on the method of tolling and enforcement employed, cordon pricing can range from moderately expensive to most expensive. On the lower end of the cost scale is deploying app-based technology with selective enforcement, which could lower equipment CapEx, but results in lower potential revenues and reduce pricing's effectiveness. On the other hand, a robust implementation of tolling equipment around the cordon's boundary would reduce revenue leakage, but significantly raise construction and operational costs.
- **Roadways** – Tolling of the Portland's throughway network will be the most expensive due to the network's extensive geographical footprint. Even by selecting technologies to make it easier for customers to pay a toll, such as mobile apps, and with a minimal number of toll gantries needed for enforcement, roadway pricing will be costly to construct and will generate vast number of transactions to process.

Table 2: Implementation Cost and Revenue Considerations

| Scenarios | Method of Pricing | CapEx | OpEx | Revenue Potential |
|------------------------|----------------------------------------------------|-----------------------------|-----------------------------|--------------------------|
| VMT | • OReGo OBDII port technologies | Moderately Expensive | Moderately Expensive | \$\$\$\$ |
| | • Self-reporting | Moderately Expensive | Most Expensive | |
| Cordon Pricing | • Tolling technology | Most Expensive | Moderately Expensive | \$ |
| | • Mobile apps | Least Expensive | Moderately Expensive | |
| | • Connected vehicles | Most Expensive | Moderately Expensive | |
| Parking Pricing | • Raise prices using existing paid parking systems | Least Expensive | Least Expensive | \$ |
| Roadway Pricing | • Tolling technology | Most Expensive | Most Expensive | \$\$ |
| | • Mobile apps | Most Expensive | Most Expensive | |
| | • Connected vehicles | Most Expensive | Most Expensive | |

Legend:

| | | |
|------------------------|-----------------------------|-----------------------|
| Least Expensive | Moderately Expensive | Most Expensive |
|------------------------|-----------------------------|-----------------------|

The following section provides a more detailed explanation of each pricing scenario’s method of pricing.

- VMT OReGo/OBDII – Leveraging and expanding ODOT’s OReGo road user charge program, the CapEx would entail expanding agency and vendor systems to support administering the program and equipping vehicles with on-board units (OBU) connected to vehicle OBDII ports to collect mileage information. OpEx includes cost for processing the millions of transactions, managing and supporting customer accounts, and program oversight
- VMT OReGo/Self-Reporting – Also assuming the OReGo program can be utilized, the CapEx would entail expanding agency and vendor systems to support administering the program and equipping stations and technologies to verify driver self-reported mileage. OpEx includes more substantial cost for processing the millions of transactions, managing and supporting customer accounts, and program oversight.
- Cordon Pricing Tolling Technology – Without an existing toll program to utilize, the CapEx to equip 40 to 63 potential intersections with tolling equipment to capture vehicles entering the Zone and developing a new system to support transaction processing and customer support would be relatively expensive. OpEx includes more substantial cost for processing transactions (including cost to manually review license plates of violators), managing and supporting customer accounts, and program oversight.
- Cordon Pricing Mobile Apps – Without an existing toll program to utilize, the CapEx would need to develop a new system to support transaction processing and customer support.

Although a mobile app-based approach would significantly reduce the need to install tolling equipment at all intersections on the cordon's boundary, tolling equipment for enforcement at key intersections would be highly recommended. OpEx includes more significant cost for in-road enforcement, processing transactions, managing and supporting customer accounts, and program oversight. Implementation and operational cost savings would potential be offset by losses in revenues from less effective enforcement of toll payments.

- Cordon Pricing Connected Vehicles – Auto manufacturers are increasingly equipping their vehicle model ranges with vehicle-to-vehicle and vehicle-to-roadside communication capabilities. The Society of Automotive Engineering (SAE) is working with Original Equipment Manufactures on tolling standards for connected vehicles to be adopted this year. Therefore, connected vehicles can potentially reduce the need to deploy as much roadside tolling equipment thus reducing those associated CapEx costs. However, any CapEx cost savings from reduction in tolling roadside equipment would be offset in the near term by significantly higher cost to develop connected tolling technologies and to support vehicles without the latest connected technology. OpEx includes more substantial cost for processing transactions, managing and supporting customer accounts, and program oversight.
- Parking Pricing – Since public paid parking programs are being utilized for congestion pricing, CapEx cost would be limited to altering existing systems to support the added congestion fee. OpEx would likewise be limited to accounting for the congestion fees collected alongside parking fees already being processed. Although costs are low, revenue from parking pricing is also likely to be low.
- Roadway Pricing Tolling – Without an existing toll program to utilize, the CapEx to equip all of Portland's 235 center lane miles of throughways with tolling equipment and developing a new system to support transaction processing and customer support would be significantly expensive and the first in the United States for a metro region. Toll gantries spanning all highway lanes would need to be spaced at regular intervals to capture all vehicles. Some cost savings could be obtained by strategically locating toll gantries at highest volume/congested locations, but this would reduce revenue, pricing's effectiveness to manage traffic, and create public perception that pricing is not applied/enforced consistently. OpEx includes more significant cost for processing millions of transactions (including cost to manually review license plates of violators), managing and supporting customer accounts, and program oversight.
- Roadway Mobile App – Similar to the cordon pricing mobile-app approach, mobile app-based tolling could reduce the amount of roadside tolling equipment needed; however, given Portland's vast throughway network and need to deploy toll gantries to enforce payment of vehicles that do not have the payment apps, any cost savings would likely be offset by revenue loss from less effective payment enforcement. OpEx includes more significant costs for processing millions of transactions, managing and supporting customer accounts, and program oversight.
- Roadway Pricing Connected Vehicles – Similar to the cordon pricing connected vehicle approach, connected vehicle for roadway tolling could revolutionize tolling field equipment needs; however, connected vehicle technologies is not mature enough, nor widely available in the region's fleet of vehicle to currently make it a viable, cost-effective solution. CapEx to develop the technology and equipment vehicles are significant. OpEx includes more significant cost for processing millions of transactions, managing and supporting customer accounts, and program oversight.

Summary

The ease of implementation summarized in Table 1 presents a high-level screening which takes into account broad issues. As Metro fine tunes pricing scenarios, implementation details will also become more clear and solutions refined. Key insights of implementation at this stage:

1. **Parking pricing** is the easiest to implement since it leverages existing infrastructure and processes to introduce congestion pricing.
2. **Cordon pricing** can leverage state of the art tolling and enforcement technologies, making implementation moderate.
3. Although **roadway pricing** can leverage tolling methods, enforcement of tolling on major arterial roads could be cost prohibitive, reflecting why arterial tolling is not typically done.
4. **VMT** has the OReGO program it can build upon, but a major implementation barrier is enforcement and mandating vehicles to participate.

A pilot phase might make sense for the Portland region to trial one or more technologies before scaling up to a region-wide system.

Metro Regional Congestion Pricing Study

MODELING AND RESEARCH RESULTS – 05/28/21 FINDINGS

Key Takeaways

VMTB – charge per mile driven

1. Approximately 1.3 times the cost of driving in Base.
2. Improvements on all modeled performance measures.
3. VMTB shows changes to driver behavior at a region-wide scale.
 - Performs well at reducing VMT, drive alone rate, delay, and emissions.
 - Also improves transit trips and job access via both transit and auto.
 - Auto volumes decrease on most facilities
4. Second highest travel costs at a regional scale; costs are throughout MPA on all drivers
5. Combines high increase in travel costs with low improvement in auto jobs access in outer areas (many Equity Focus Areas!).
6. VMT scenarios had the highest revenue potential and could build on OReGO as a pilot trial project.

VMTC – higher charge per mile driven

1. Approximately 1.6 times the cost of driving in Base.
2. Even more improvement on all modeled performance measures than with VMTB.
3. VMTC shows a very substantial changes to driver behavior at a region-wide scale.
 - Largest reduction in VMT, drive-alone rate, and emissions.
 - Largest improvement in job access via both transit and auto
 - Very effective at reducing delay
4. Highest travel costs at a regional scale; costs are throughout MPA shared by all drivers
5. Combines high increase in travel costs with low improvement in auto jobs access in outer areas (many Equity Focus Areas).
6. VMT scenarios had the highest revenue potential and could build on OReGO as a pilot trial project.

CordonA – drivers charged to enter an area

1. Charge of \$7 (\$2020) to enter downtown, So. Waterfront and Northwest Portland core from any direction.
2. No charge for using highways (US-26, I-405, I-5) to travel through the cordon area.
3. Benefits and impacts are diluted when observed at a regional scale. Benefits are localized.
4. Overall, increases delay (generally near downtown Portland adjacent to the cordon area) as drivers seek to avoid paying toll and shift to freeways and arterials parallel to cordon.
5. Jobs access decreases via auto, improves slightly via transit.
6. Reductions in drive-alone rate and VMT, and increase in transit trips.
7. Cost to the region as a whole is low as is revenue generation potential. The cost will only accrue to those entering the cordon.
8. Highest travel costs occur to people living outside, but near the cordon.

CordonB – drivers charged to enter larger area

1. Same charge as CordonA, but extends boundary to Central Eastside and Lloyd District.
2. No charge for using highways (US-26, I-405, I-5) to travel through the cordon area.
3. Results similar to CordonA. Benefits and impacts are diluted when observed at a regional scale. Benefits are localized.
4. Overall, increases delay (generally near downtown Portland adjacent to the cordon area) as drivers seek to avoid paying toll and shift to freeways and arterials parallel to cordon.
5. Jobs access decreases via auto, improves via transit.
6. Reductions in drive-alone rate and VMT, and increase in transit trips.
7. Cost to the region and potential revenue generation as a whole is low. The cost will only accrue to those entering the cordon.
8. Highest travel costs occur to people living outside, but near the cordon.

**Metro Regional Congestion Pricing Study
Summary of Key Findings 05/28/21**

ParkingA – higher charges to park

1. ParkingA scenario charges for parking in locations and short- and long-term rates assumed in the 2040 FC RTP.
2. Benefits and impacts are diluted when observed at a regional scale. Benefits are localized.
3. VMT, delay, and drive alone rates decrease, and job access increases for both auto and transit.
4. Some reduction in auto volumes mainly near downtown Portland, mainly due to drivers shifting to transit.
5. Cost to region as a whole is low as is potential revenue generation. Only drivers who park in areas with parking charges will pay; some areas have low charges and some have higher charges. Revenues are low.
6. Easiest to implement of all pricing types. Can be done by individual jurisdictions with existing collections infrastructure.

ParkingB – much higher charges to park

1. Same locations charged as ParkingA. Costs are doubled over 2040 FC RTP charges.
2. Benefits and impacts are diluted when observed at a regional scale. Benefits are localized.
3. VMT, delay, and drive alone rates decrease, and job access increases for both auto and transit.
4. Some reduction in auto volumes mainly near downtown Portland and other employment centers, mainly due to drivers shifting to transit.
5. Highest reduction in drive alone rate.
6. Cost to region as a whole is low as is potential revenue generation. Only drivers who park in areas with parking charges will pay; some areas have low charges and some have higher charges.
7. Easiest to implement of all pricing types. Can be done by individual jurisdictions with existing collections infrastructure.

RoadwayA – toll on highways

1. Charges for use of “throughways” at a similar rate to VMTC per mile: \$0.312/mile over base. Other roadways are not charged. (Throughways are freeways and limited access roadways.)
2. Reduces VMT, drive alone rate, and emissions, and increases job access via auto.
3. Reduces delay on highways, but increases delay on arterials (traffic diverts onto arterials to avoid tolls).
4. Diversion onto arterials reduces access to jobs via transit, impacting lower wage workers and people in equity focus areas more than the region as a whole.
5. More region-wide travel costs than Parking or Cordon scenarios, with more travelers paying a charge. Second highest potential for revenue after VMT.
6. People living near freeways tend to pay higher costs.
7. Roadway pricing enforcement can be difficult. Works best on limited access roadways.

RoadwayB – higher toll on highways

1. RoadwayB doubles the cost of RoadwayA for travel on throughways.
2. Reduces VMT, drive alone rate, and emissions, and increases job access via auto.
3. Largest reduction in delay on highways, but largest increase in delay on arterials (traffic diverts onto arterials to avoid tolls) for all scenarios.
4. Diversion onto arterials reduces access to jobs via transit even more than RoadwayA, impacting lower wage workers and people in equity focus areas more than the region as a whole.
5. Lower region-wide travel costs than RoadwayA despite a much higher per-mile charge. Second highest potential for revenue after VMT.
6. People living near freeways tend to pay higher costs.
7. Roadway pricing enforcement can be difficult. Works best on limited access roadways.

Metro Regional Congestion Pricing Study
Summary of Key Findings 05/28/21

Table 1: Summary of Draft Key Findings from Metro Regional Congestion Pricing Study

| RTP Goal | Metrics | VMT B | VMT C | COR A | COR B | PARK A | PARK B | RD A | RD B |
|-----------------------------------|----------------------|-------------|-------|------------|------------|--------|--------|--------|--------|
| Congestion & Climate | Daily VMT | | | | | | | | |
| | Drive Alone Rate | | | | | | | | |
| | Daily Transit Trips | | | | | | | | |
| | 2HR Freeway VHD | | | | | | | | |
| | 2HR Arterial VHD | | | | | | | | |
| Climate | Emissions | | | | | | | | |
| Equity | Job Access (Auto) | | | | | | | | |
| | Job Access (Transit) | | | | | | | | |
| Total Regional Travel Cost | | Medium-High | High | Medium-Low | Medium-Low | Low | Low | Medium | Medium |

The above table provides a high-level summary of the draft findings discussed in this document for each scenario across the modeled metrics. Scenario modeling results were compared results from Metro’s 2018 Regional Transportation Plan to determine approximate benchmarks to indicate positive or negative impacts for each metric. This table displays how each scenario performs against those benchmarks, and allows for a quick comparison of different scenarios in a visual format; a legend that details the ranges for categorizing each metric is provided below, and descriptions of each metric are provided on the following page. The results shown in this table show only the effects of charging drivers under different scenarios; implementation of mitigations, discounts, or other changes to policies could results in changes to the performance of a scenario.

All eight scenarios provide at least a small positive change for drive alone rate and emissions, while seven of the eight scenarios provide at least a small positive change for daily VMT and daily transit trips.

The two VMT scenarios and the Parking B scenario have all positive regional results across metrics, while the Parking A scenario has mostly positive results, but also minimal changes for the Job Access via Transit metric. The two Cordon scenarios and the two Roadway scenarios have more mixed results. Both Cordon scenarios have small to moderate negative changes for both delay and job access via auto. This appears to be the result of drivers seeking to avoid the charge in the cordon area and remaining on highways or nearby arterials instead of utilizing surface streets within the cordon boundaries. The two Roadway scenarios see moderate to large negative changes in arterial delay, as well as minimal change to small negative change in Job Access via Transit. This appears to be the result of drivers seeking to avoid the charge on the highways and diverting to arterial streets near the charged roadways. As noted above, a specific tolling program could be designed and implemented in a way that could mitigate these negative changes; however, this study does not model the effects of any such mitigations.

| Legend | | Daily VMT | Drive Alone Rate | Job Access (Auto) | Job Access (Transit) | Daily Transit Trips | 2HR Freeway VHD | 2HR Arterial VHD | Emissions |
|--------|--------------------------|---------------|------------------|-------------------|----------------------|---------------------|-----------------|------------------|---------------|
| | Large Negative Change | 5% or more | 5% or more | -10% or more | -5% or more | -10% or more | 10% or more | 10% or more | 5% or more |
| | Moderate Negative Change | 2% to 5% | 2% to 5% | -5% to -10% | -2% to -5% | -5% to -10% | 5% to 10% | 5% to 10% | 2% to 5% |
| | Small Negative Change | 0.5% to 2% | 0.5% to 2% | -1% to -5% | -0.5% to -2% | -1% to -5% | 1% to 5% | 1% to 5% | 0.5% to 2% |
| | Minimal Change | 0.5% to -0.5% | 0.5% to -0.5% | 1% to -1% | 0.5% to -0.5% | 1% to -1% | 1% to -1% | 1% to -1% | 0.5% to -0.5% |
| | Small Positive Change | -0.5% to -2% | -0.5% to -2% | 1% to 5% | 0.5% to 2% | 1% to 5% | -1% to -5% | -1% to -5% | -0.5% to -2% |
| | Moderate Positive Change | -2% to -5% | -2% to -5% | 5% to 10% | 2% to 5% | 5% to 10% | -5% to -10% | -5% to -10% | -2% to -5% |
| | Large Positive Change | -5% or more | -5% or more | 10% or more | 5% or more | 10% or more | -10% or more | -10% or more | -5% or more |

**Metro Regional Congestion Pricing Study
Summary of Key Findings 05/28/21**

Definitions of Performance Metrics:

Daily VMT: vehicle miles traveled (daily)

Drive Alone Rate: percentage of total daily trips undertaken by drivers without passengers

Daily Transit Trips: Number of total transit trips (daily)

2HR Freeway VHD: freeway vehicle hours of delay. The total time accrued by all vehicles traveling on model freeway links with volume-to-capacity ratio of over 0.9 during the PM peak.

2HR Arterial VHD: arterial vehicle hours of delay. The total time accrued by all vehicles traveling on model arterial links with volume-to-capacity ratio of over 0.9 during the PM peak.

Emissions: percent change in greenhouse gas and other emissions including: CO_{2e}, PM_{2.5}, PM₁₀, NO_x, and VOC, calculated using Metro’s Multi-Criteria Evaluation (MCE) tool, which estimates quantitative social return on investment of scenarios and applies emission rates derived from Metro’s application of EPA’s MOVES model to VMT of each scenario

Job Access (Auto): the number of jobs within 30 minutes by auto, averaged by TAZ and weighted by number of households

Job Access (Transit): the number of jobs within 45 minutes by transit, averaged by TAZ and weighted by number of households

Total Regional Travel Cost: The average weekday (2027) sum of all users’ cost to travel, including auto operating cost, tolls, parking charges, and transit fares, expressed in thousands of 2010\$.

ⁱ **Equity Focus Areas:** locations identified as part of the 2018 RTP Equity analysis that include census tracts with high concentrations of people of color, people in poverty and people with limited English proficiency.

| Community | Geography Threshold |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| People of Color | The census tracts which are above the regional rate for people of color (28.6%) AND the census tract has twice (2x) the population density of the regional average (regional average is 1.1 person per acre). |
| People in Poverty | The census tracts which are above the regional rate for low-income households (28.5%) AND the census tract has twice (2x) the population density of the regional average (regional average is 1.1 person per acre). |
| People with Limited English Proficiency | The census tracts which are above the regional rate for limited English proficiency speakers (7.9%) AND the census tract has twice (2x) the population density of the regional average (regional average is .3 person per acre) |

Source: Metro, 2018 RTP transportation equity work group

Materials following this page were distributed at the meeting.

May 2021 traffic deaths in Clackamas, Multnomah and Washington Counties*

Sergio Hunt, 17, walking, Multnomah, 5/23

Carl Vernon Holmes, 84, driving, Multnomah, 5/19

Unknown, driving , Multnomah, 5/19

Jose Luis Mendez, 51, walking, Washington, 5/12

Janell Rene Butler, 46, driving, Washington, 5/11

Martin Ixquiactap-Tambriz, 41, walking, Washington, 5/10

Megan McComb, 32, scooter, Multnomah, 5/8

David Dentler, 25, driving, Multnomah, 5/6



**ODOT preliminary fatal crash report and news reports, as of 5/25/21*





Metro

Agenda Item 5:

June 2021 Formal Amendment Summary

Resolution 21-5182

Amendment # JN21-11-JUN

Applies to the 2021-24 MTIP

Agenda Support Materials:

- Draft Resolution 21-5182
- Exhibit A to Resolution 21-5182 (amendment tables)
- Staff Report + 2 Attachments

June 4, 2021

Ken Lobeck

Metro Funding Programs Lead

June 2021 Formal MTIP Amendment

Overview

- June Formal Amendment bundle - 23 projects:
 - 14 reprogramming corrections to Unified Work Planning Program (UPWP) prepositioned projects
 - Adding 3 new projects
 - Combining 2 projects
 - Canceling 2 projects
 - 1 limit corrections
 - 1 cost increase
- Open to questions or project discussions
- Staff motion: Request approval Resolution of 21-5182

June 2021 Formal MTIP Amendment

UPWP Project Pre-Positioning Reprogramming

(Projects #1-14 in the amendment bundle)

- June continues reprogramming actions to UPWP STBG funded pre-positioned projects
- UPW projects in FFY 22, 23, or 24 out to FFY 25:
 - Safe Routes to Schools (SRTS)
 - Statewide Travel Survey
 - Transit Oriented Development (TOD) program
 - TSMO Administration funds
 - TSMO allocation buckets for awarded TSMO projects
- Reprogramming purpose: Avoid conflicts with the Obligation Targets program

UPWP = Unified Planning Work Program

FFY = Federal Fiscal Year

STBG = Federal Surface Transportation Block Grant funds

June 2021 Formal Amendment UPWP Related

Adding New ADA Projects – Keys 22431 and 22432

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|-------------------------------|-----------------|------------------------------------------------------------------------------------|
| 15 | 22431 | ODOT | OR141/OR217 Curb Ramps | Add new project | OTC January 2021 action committing funds for required ADA curb & ramp improvements |
| 16 | 22432 | ODOT | US30BY Curb Ramps | Add new project | |

The formal amendment:

- Adds the two new ADA improvement projects in compliance with OTC action
- Key 2241: The project will construct ADA compliant curbs and ramps on OR 141 (Hall Blvd at two location between MP 2.57 to 7.07) and on SW 72nd Ave (between SW Beveland Rd to SW Varnes St) in the Tigard area.
- Key 22432 The project will construct ADA compliant curbs and ramps on US30Bypass in the NE Portland area.

OTC = Oregon Transportation Commission

ADA = American Disabilities Act

June 2021 Formal Amendment UPWP Related Limits Correction to Key 21161 - ODOT

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|-------------------------------------------------------|
| 17 | 21161 | ODOT | OR99W: OR217 - SW Sunset Blvd & US30B: Kerby - 162nd Ave OR99W: N Schmeer Rd - SW Meinecke Pkwy & US30B: Kerby - 165th Ave | Limits Correction (MP limits change is greater than 0.25 miles) | Limits change also requires update project name |

The formal amendment:

- The amendment corrects the milepost project limits based on the updated project charter. The limit changes are significant and result in a required adjustment to the project name. The project scope and programming costs remain unchanged
- The project will upgrade signals, replace or modify signs and road markings, install lighting and bike lane conflict markings to improve safety on this section.

MP Limits = Assigned Mile Post designations on the State Highway System (e.g. updated MP limits on US30 are MP 5.60 to MP 14.70)

June 2021 Formal Amendment UPWP Related

Adding New Metro Award TSMO Project for ODOT

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-----|-------------|---------------------------------------------------------------------------|-----------------|---------------------------------------|
| 18 | New | ODOT | Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy | Add new project | January 2020 Metro TSMO funding award |

- The formal amendment:
- Adds the new TSMO/ITS improvement project to the MTIP
- The project will purchase Advanced Transportation Controllers (ATCs, hardware and software) and converting the existing traffic signal timing at various locations in Region 1.
- Metro TSMO federal funding award of \$239,507. Add the required match of \$27,413, the total estimated project cost is \$266,920.
- Federal funding will be Metro awarded Surface Transportation Block Grant (STBG) pulled from Keys 20884 and 20885 (also part of this amendment bundle).

TSMO = Transportation Systems Management and Operations

ITS = Intelligent Transportation System

June 2021 Formal Amendment UPWP Related

New ODOT TSMO Project Funding – Keys 20884 & 20885

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|--------------------------------------------------|---------------------------------|-------------------------------------------------------------------------------------|
| 19 | 20884 | Metro | Transportation System Mgmt Operations/ITS (2019) | Split funds and to new TSMO ATC | UPWP pre-positioned revenue buckets supporting specific Metro awarded TSMO projects |
| 20 | 20885 | Metro | Transportation System Mgmt Operations/ITS (2020) | | |

The formal amendment:

- Reduces both TSMO revenue project grouping buckets to support the new ODOT Advanced Traffic Controller (ATC): OR99E & Tualatin Valley Hwy project
- All funds shifted from Key 20884 to new ATC project
- Remaining funds left in Key 20885 to Federal Fiscal Year (FFY) 2025

OTC = Oregon Transportation Commission

ADA = America Disabilities Act

June 2021 Formal Amendment UPWP Related

Cancel ODOT I-84 MLK to I-205 Pavement Rehab project

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|----------------------------------------------------|----------------|--------------------------------------------|
| 21 | 21800 | ODOT | I-84: NE Martin Luther King Jr Blvd - I-205 | Cancel project | Project to be re-added to the 2024-27 STIP |

The formal amendment:

- Cancels the project from the MTIP and STIP. Note: The project most likely will be re-added to the 2024-27 STIP.
- The project was planned to complete the required design activities for a future pavement rehabilitation project to occur on I-84 from Martin Luther King Blvd east to the I-205 junction.
- The pavement is in better condition than expected. The required surface rehabilitation can be delayed until the next STIP cycle.

STIP = Statewide Transportation Improvement Program

June 2021 Formal Amendment UPWP Related

Shift Funds and Cancel TriMet's Electric Bus Purchase

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|----------------------------------------------------|----------------|------------------------------------------------------|
| 22 | 22188 | TriMet | Electric Bus Purchase (Metro Fund Exchange) | Delivery issue | Shift funds to TriMet MAX Red Line Extension project |

The formal amendment:

- De-programs the Congestion Mitigation Air Quality (CMAQ) and match from the Electric Bus purchase project and commits the funds to TriMet's MAX Red Line Extension Project
- Delivery timing issue in Federal Fiscal Year (FFY) 2023 prevents TriMet from moving forward as planned to procure the electric buses in FFY 2023.
- At risk is \$4,946,372 of allocated CMAQ funds to Metro.
- The CMAQ funds have an obligation shelf-life expiration of the end of FFY 2023. Funds must be obligated by the end of 9/30/2023 or they will lapse.
- CMAQ funds require an air quality emission reduction analysis to determine if a proposed suitable substitute is eligible along with several other eligibility factors.

June 2021 Formal Amendment

Commit CMAQ to TriMet's MAX Red Line Extension Project

| # | Key | Lead Agency | Project Name | Change Reason | Note |
|----|-------|-------------|---------------------------------------------------|--------------------------|------------------------------------------------------|
| 23 | 20849 | TriMet | MAX Red Line Extension & Reliability Improvements | CMAQ Suitable Substitute | Shift funds to TriMet MAX Red Line Extension project |

The formal amendment:

- Programs the \$4,946,372 of CMAQ and match from the Electric Bus purchase project to TriMet's MAX Red Line Extension Project
- Funds obligation planned for the end of FFY 2021.
- Required review and pre-programming approval steps completed with the ODOT State CMAQ manager and FHWA.
- The TriMet MAX Red Line project has been determined to be an acceptable suitable substitute for the CMAQ funds.
- Minor phase cost updates also completed as the project prepares to implement the construction phase.

MPO CFR Compliance Requirements

MTIP 8 Review Factors

1. MTIP required programming verification is completed
2. MTIP funding eligibility verification is completed
3. Passes fiscal constraint review and verification
4. Passes RTP consistency review:
 - Identified in current constrained RTP
 - Reviewed for possible air quality impacts
 - Verified as a Regionally Significant project and impacts to the region
 - Verified correct location & scope elements in the modeling network
 - Verified RTP and MTIP project costs consistent
 - Satisfies RTP goals and strategies
5. MTIP & STIP programming consistency is maintained against obligations
6. Verified as consistent with UPWP requirements as applicable
7. MPO responsibilities verification: Public notification completion plus OTC approval required completed for applicable ODOT funded projects
8. Performance Measurements initial impact assessments completed

June 2021 Formal Amendment

Public Notification Period

30 Day Public Notification/Opportunity to Comment period is
June 1, 2021 to June 30, 2021

<https://www.oregonmetro.gov/metropolitan-transportation-improvement-program>

AMENDMENTS

The MTIP and STIP are “living” documents, subject to updates through an amendment process. Metro releases all amendments for public review before the Metro Council takes action.

To comment, contact Summer Blackhorse at summer.blackhorse@oregonmetro.gov.

FFY 2020 formal amendments

 [June 2021 Formal Amendment Resolution 21-5182](#)

Comment by June 30, 2021

1003.08 KB Adobe Acrobat PDF | Published Jun 1, 2021

June 2021 Formal Amendment

Estimated Approval Timing & Steps

| Action | Target Date |
|------------------------------------------------------|---------------------|
| 30 Day Public Notification Period Begins | June 1 2021 |
| TPAC Notification and Approval Recommendation | June 4, 2021 |
| JPACT Approval and Recommendation to Council | June 17, 2021 |
| 30 Day Public Notification Period Ends | June 30, 2021 |
| Metro Council Approval of Resolutions 20-5182 | July 8, 2021 |
| Amendment Bundle Submission to ODOT | July 15, 2021 |
| ODOT & USDOT Final Approvals | Early August 2021 |

June 2021 Formal Amendment

Approval Recommendation & Questions

TPAC Approval Recommendation:

- Provide an approval recommendation for Resolution 21-5182 and the 23 projects under MTIP Amendment JN21-11-JUN
- Correct typos, etc. in support materials as needed
- Questions, Comments, and/or Project Discussions as Needed?



Metro

2024-27 MTIP Financial Forecast

June 4, 2021

MTIP Financial Forecast

- Required element of the MTIP process
- Provides overall funding context for upcoming allocation process decisions
- Not a commitment of funds to allocation programs or specific projects
- Expected federal and state generated revenues only

Summary of forecast

| | FFY 2024 | FFY 2025 | FFY 2026 | FFY 2027 | FYs 2024-27 Total |
|------------------------------------------------|----------|----------|----------|----------|----------------------|
| ODOT Directed | N/A | \$98.07 | \$98.07 | \$98.07 | \$294.2 |
| ODOT to Cities/Counties | N/A | \$9.42 | \$9.42 | \$9.42 | \$28.28 |
| State Trust Fund to Cities/Counties | \$240.36 | \$249.66 | \$248.83 | \$248.00 | \$986.85 |
| Metro MPO | (\$6.27) | \$48.5 | \$49.5 | \$50.6 | \$142.4 |
| SMART | \$2.59 | \$2.65 | \$2.72 | \$2.78 | \$10.74 |
| TriMet | \$104.8 | \$113.2 | \$114.5 | \$119.9 | \$452.4 |
| Total | \$341.48 | \$521.5 | \$523.04 | \$528.77 | \$1,914.87 |

Top line findings

- **\$1.9 billion** of revenue expected
 - Not all revenues included in MTIP
- State generated funds are the large majority of expected transportation investment
- Likely greater investment when including local revenues (e.g. local gas taxes, passenger fares, system development charges) and federal discretionary grants (e.g. New Starts, INFRA, RAISE)

Regional Flexible Funds

- Greater range of possible revenue outcomes than in prior cycles
- Utilizing new forecast method options to capture possible outcomes
- “Moderate Growth” method used allocation forecast
- Revenue management through MTIP programming process increasingly important

TPAC Discussion

- Any additional information or clarity needed for the MTIP revenue forecast?
- Are there any additional issues or concerns that should be addressed in proceeding with the “Moderate Growth” Regional Flexible Fund revenue forecast?

oregonmetro.gov



2025-2027 Regional Flexible Funds Allocation (RFFA) Program Direction

Presentation to TPAC
June 4, 2021



Metro



RFFA Program Direction

- Statement of intent to target regional funds to achieve regional priorities
- Sets objectives and outcomes for allocation process
- Defines funding categories (Steps 1 & 2)



DRAFT 2025-2027 Regional
Flexible Funds Allocation
Program Direction

(Resolution 21-XXXX)

July 2021

2025-27 RFFA process timeline

2021: Program Direction

Council work session: Mar. 9

Public workshops:
Mar. 10, Apr. 8, Apr. 28

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.

Updates from 22-24 Direction

Changed Step 2
funding categories
to single category

Multiple-outcome
projects focused on
four RTP Investment
Priorities



Step 1 Regional Investments

- 1A – Bond repayments
- 1B – Regionwide investments, planning
- Report in May TPAC materials



Step 2 Capital Investments

- Single project category, focus on advancing RTP Priority Investment outcomes
- Improving Active Transportation network, supporting Economic outcomes
- More flexibility in how projects are conceived and proposed, can include Better Bus elements
- Consistency with Regional Finance Approach

Step 2 criteria

Equity

- Increased accessibility
- Increased access to affordable travel options

Climate

- Reduced emissions from vehicles
- Reduced drive-alone trips

Safety

- Reduced fatal and serious injury crashes for all modes

Congestion

- Increased reliability
- Increased travel efficiency
- Increased travel options
- Reduced drive-alone trips

Developing performance measures, evaluation method

- Work group convened in Summer 2021
- Review with TPAC in fall prior to project call in November
- Not weighted, but JPACT may direct funding to focus on any of the four priority areas

Projected funding: \$142,350,000

Step 1A
\$65,280,000

- Bond repayment commitment

Step 1B
\$35,820,186

- Regionwide investments
- System & corridor planning
- MPO responsibilities

Step 2
\$41,249,814

- Capital project investments

Trails bond funding

- Sharing application, technical evaluation, risk assessment with RFFA
- Not combining funding sources or selection processes
- Streamline application processes



Metro

Discussion

Call for recommendation to JPACT



Metro

Regional Congestion Pricing Study

TPAC

June 4, 2021

Regional Congestion Pricing Study

- Expert Review Panel Summary
- Updates to Study Findings
 - Implementation
 - Equity
- DRAFT Recommendations for Consideration
- Next Steps

Regional Congestion Pricing Study

RCPS Goal:

To understand how our region could use congestion pricing to manage traffic demand to meet climate goals without adversely impacting safety or equity.

Not recommending project or implementing any pricing measures

Expert Review Panel: April 22, 2021



**Christopher
Tomlinson**

State Road & Tollway
Authority, Georgia
Regional Transportation
Authority, Atlanta Region
Transit Link Authority



Rachel Hiatt

San Francisco County
Transportation
Authority



Sam Schwartz

Sam Schwartz
Transportation
Consultants



**Clarrissa
Cabansagan**

TransForm



Daniel Firth

C40 Cities

Key Takeaways

- **Review of Metro's technical approach and findings** found RCPS methods to be sound and findings to be consistent with what they have seen elsewhere related to potential benefits and impacts of four pricing tools
- **Clarity of purpose** is essential for pricing projects/programs- design leads to outcomes desired
- **Equity**- critically important to center equity, and recognize the very real and unintended consequences that can arise from not doing so.

Key Takeaways

- **Diverse outreach-** it is important to reach out broadly to all stakeholders – hear and when possible address concerns- understanding that not all groups will be supportive, and that public acceptance of the effort will change over time.
- **Place-based strategies-** customize pricing for urban/suburban/ rural localities with different transportation and land use. Congestion pricing has been successful *in all types of settings* at improving mobility and addressing other priorities.

Key Findings - Reminder

All four types of pricing can help address congestion and climate priorities.

- They reduced the drive alone rate, vehicle miles traveled, and greenhouse gas emissions.
- All scenarios also increased daily transit trips.
- The projected improvements are comparable to or exceed those of 2018 RTP model scenarios (even those with much higher investments in transportation projects).

Key Findings - Reminder

Geographic distribution of benefits, impacts, and costs varied by scenario.

- Diversion, travel time savings, costs to travelers
- Without changes, some scenarios would have disproportionate impacts
- Need for further analysis with future projects

There are tradeoffs for implementing pricing scenarios.

- Overall regional transportation costs and individual traveler costs vary by scenario
- Vehicle miles traveled scenarios have positive results for all eight summary metrics but also have the highest overall travel costs for the region
- Higher overall transportation costs equal higher revenue

Updates to Study Findings - Implementation

Implementation is complex

- Technology: availability, footprint, intrusiveness, compatibility
- Equity considerations (i.e. how to serve those without bank accounts)
- Enforcement: perception, effectiveness, and cost
- Costs and Financial Feasibility: up-front capital and ongoing operations
- Governance/jurisdiction
 - Who has authority to implement? To enforce?
 - How can revenues be spent?
- Ease of use

Updates to Study Findings - Implementation

- Parking pricing is easiest to implement
- Roadway pricing has high upfront costs and can be hard to enforce
- VMT (aka Road User Charge) could build on OReGO infrastructure, but has potential privacy considerations
- Revenue potential varies by type of pricing. As modeled--
 - VMT had the highest revenues
 - Roadway was second (about ½ of VMT)
 - Cordon and Parking were third (about ½ of Roadway)

Updates to Study Findings - Equity

While implementation is complex and introduces new costs, our current funding and spending system is not equitable-

- regressive (gas tax and vehicle fees)
- reinforces inequity with spending focus on auto infrastructure
- will not achieve the region's urgent climate and equity goals

Plus, gas tax revenue is shrinking and is insufficient to pay for planned investments.

Updates to Study Findings – Equity

Affordability can be built into a program

- More flexible than current funding sources. Can provide discounts or exempt key groups from paying.

Revenue can be focused on equity outcomes

- Invest in key neighborhoods or roadways
- Focus on transit, sidewalks, bike lanes
- Invest in senior and disabled services

Targeting pricing benefits to key locations

- Mobility improvements and air quality

DRAFT Recommended Considerations

- DRAFT Recommended Considerations in your packet.
- Will be in the final report presented to JPACT and Metro Council for acceptance by resolution.
- Recommended considerations are high-level, based on the findings, and are broken out for two groups:
 1. Policy Makers
 2. Future Owners/Operators

DRAFT Recommended Considerations

Please see packet for recommended considerations

Questions for TPAC

What questions or comments do TPAC members have regarding the updated findings?

What questions or comments do you have about the draft recommendations?

Are there specific areas where you want more information?

Next Steps

Wrapping up this summer-

- Technical Report with findings and considerations for future owners/operators and policymakers – shared with TPAC next week
- Discuss draft recommendations with JPACT (6/17) and Metro Council (6/22)
- Return to TPAC (7/9)
- Resolution accepting report with recommendations to be adopted by JPACT (7/15) and Metro Council (7/22)

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Extra Slides if needed

Congestion Pricing scenarios are measured against the Region's 4 Priorities (RTP 2018)



Equity-
Reduce disparity



Climate Smart –
Reducing GHG
emissions



Safety-
Getting to
Vision Zero



Congestion

Evaluation

1. Test for reducing congestion and GHG emissions
2. Review for potential impacts to equity and safety
3. Explore strategies to maximize benefits
 - Improve mobility, equity, safety
 - Increasing transit service in key areas
 - Adding pedestrian, bike, and transit infrastructure (2040 RTP Strategic investments)
 - Fee structures
 - Other?



Evaluate technical feasibility and performance of 4 different pricing tools

- Focused on 4 tools with multiple possible program designs
- Provide assessment of overall value, not a recommendation
- Model outcomes focused on 2 scenarios from each type



VEHICLE MILES TRAVELED FEE (Road User Charge)

Drivers pay a fee for every mile they travel



CORDON PRICING

Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)



ROADWAY PRICING

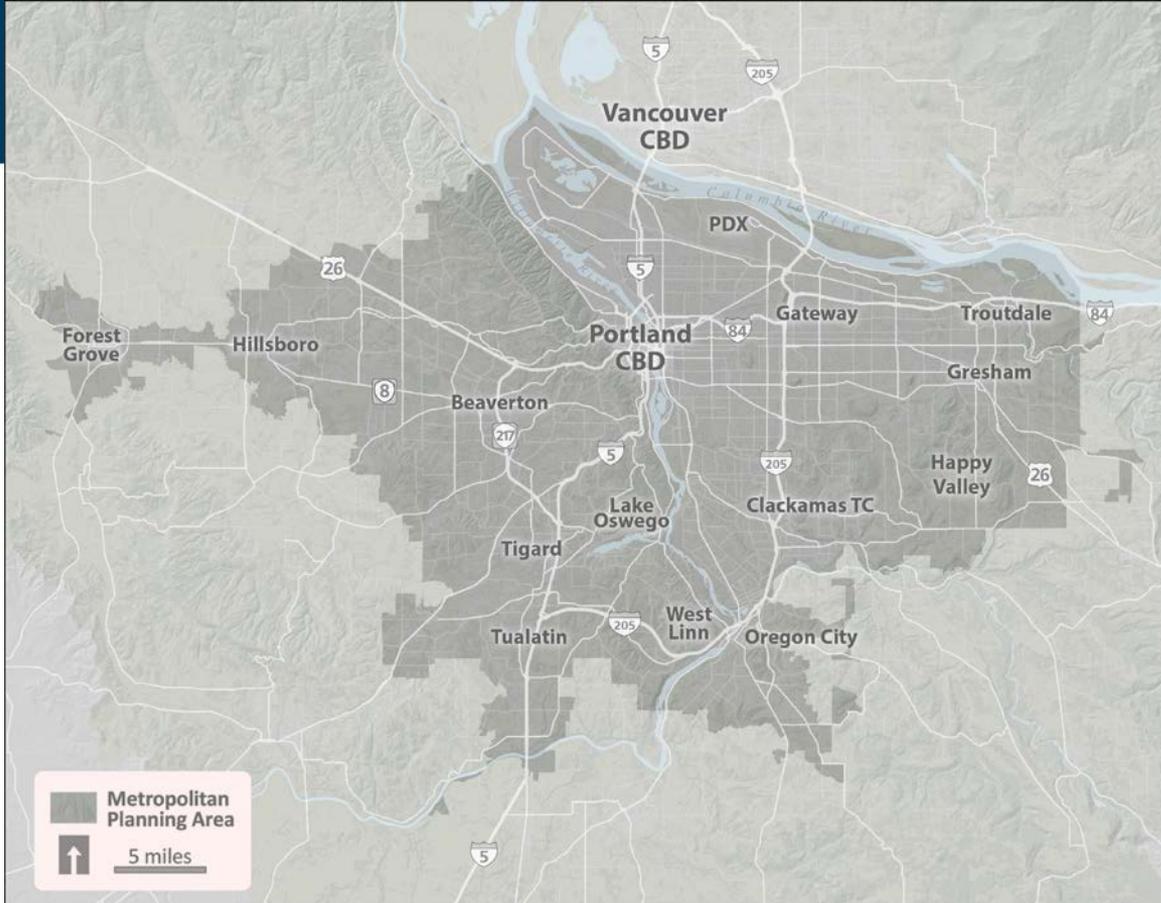
Drivers pay a fee to drive on a particular road, bridge or highway



PARKING PRICING

Drivers pay to park in certain areas

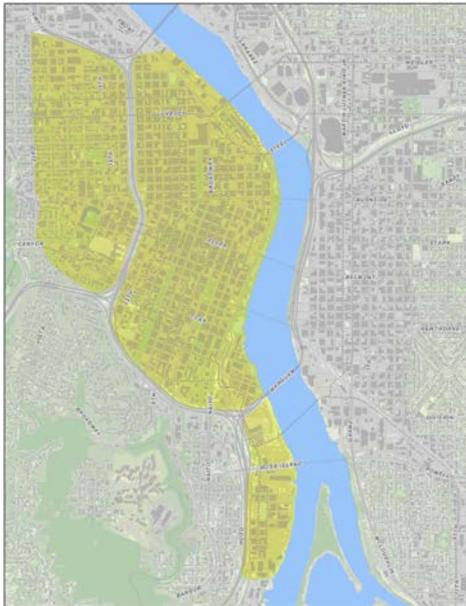
VMT Scenarios



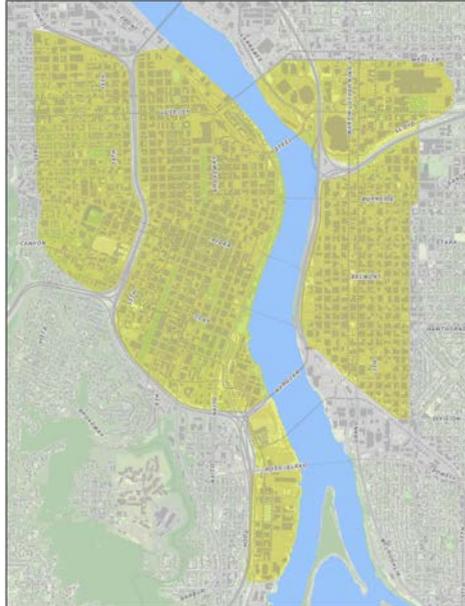
- Charges assessed within MPA boundaries for each mile driven for VMT scenarios
- VMT B = \$0.0685/mile
- VMT C = \$0.132/mile

Cordon Scenarios

Cordon A

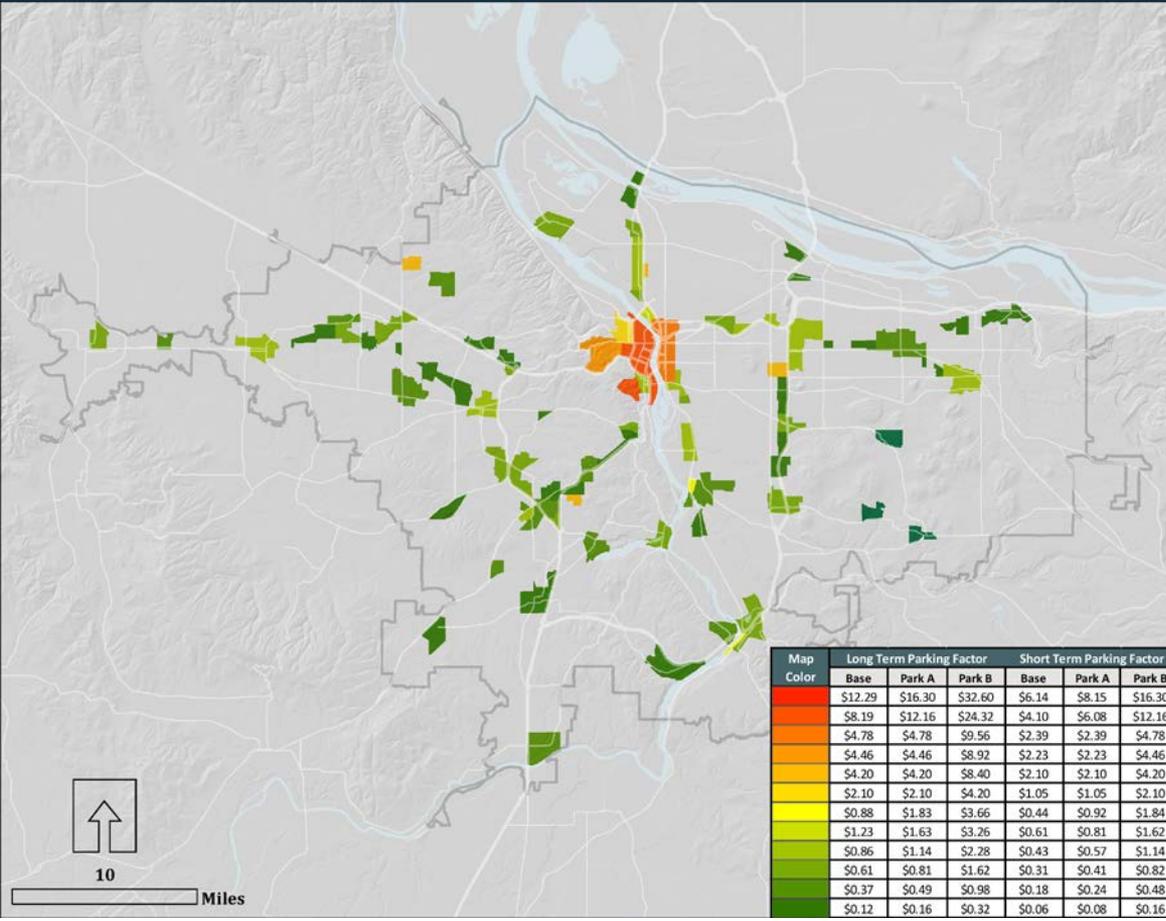


Cordon B



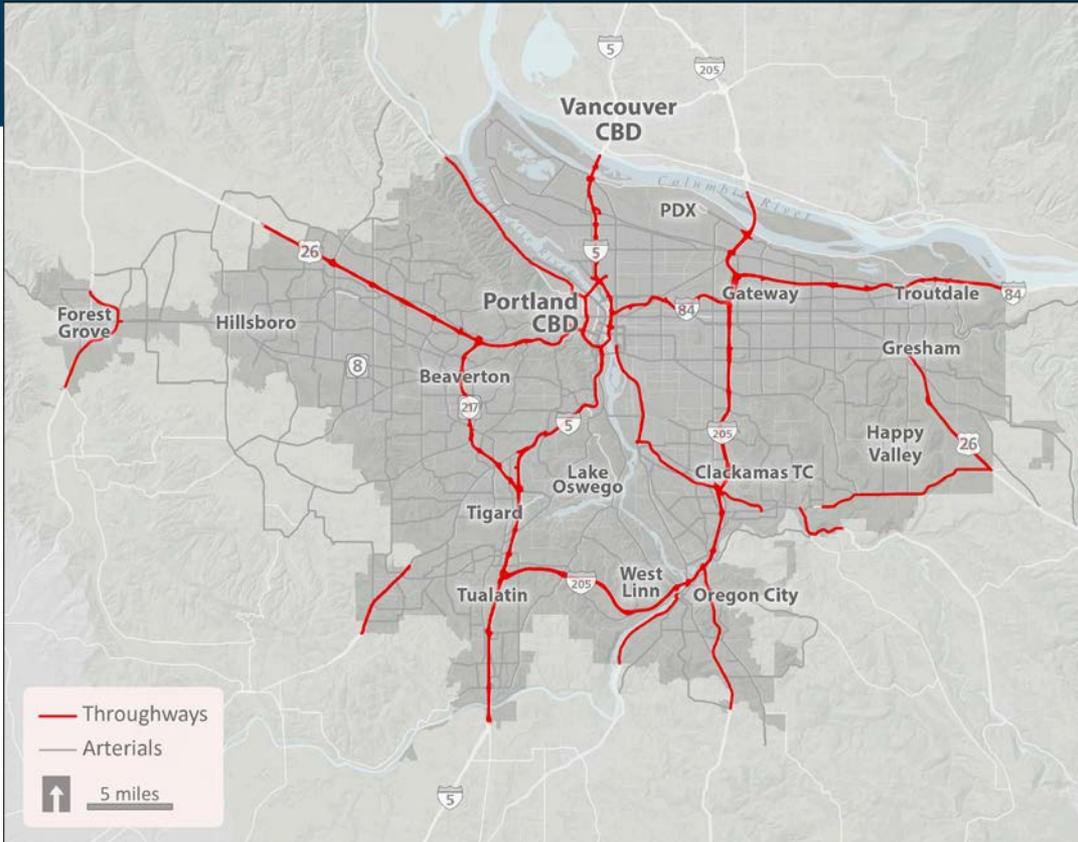
- Cordon A encompasses downtown Portland, South Waterfront, portions of NW Portland
- Cordon B expands to include Lloyd District and CEID
- Travel through the cordons on freeways/highways (i.e. I-5/I-405, or US-26 to Ross Island Bridge) are not charged
- \$5.63 to enter cordon area

Parking Scenarios



- Parking A assumes rates from RTP's 2040 FC scenario
- Parking B is double the charge of Parking A
- Parking scenarios do not include changes to parking rates outside of MPA boundaries

Roadway Scenarios



- All throughways (shown in red) within MPA boundaries are charged in Roadway A and Roadway B
- Roadway A charges the same rate as VMT C (\$0.132/mile), while Roadway B doubles that rate (\$0.264/mile)

High-Level Findings from Modeling

| RTP Goal | Metrics | VMT B | VMT C | COR A | COR B | PARK A | PARK B | RD A | RD B |
|----------------------------|----------------------|-------------|-------------|--------------|--------------|-------------|-------------|--------------|--------------|
| Congestion & Climate | Daily VMT | Green | Green | Light Green | Green | Light Green | Green | Light Green | Green |
| | Drive Alone Rate | Light Green | Green | Light Green | Light Green | Light Green | Light Green | Light Green | Light Green |
| | Daily Transit Trips | Light Green | Light Green | Light Green | Light Green | Light Green | Dark Green | Grey | Light Green |
| | 2HR Freeway VHD | Dark Green | Dark Green | Orange | Orange | Green | Dark Green | Dark Green | Dark Green |
| | 2HR Arterial VHD | Dark Green | Dark Green | Light Orange | Light Orange | Light Green | Dark Green | Light Orange | Dark Orange |
| Climate | Emissions | Green | Green | Light Green | Light Green | Light Green | Light Green | Light Green | Light Green |
| Equity | Job Access (Auto) | Light Green | Green | Light Orange | Light Orange | Light Green | Light Green | Light Green | Light Green |
| | Job Access (Transit) | Light Green | Light Green | Light Green | Light Green | Grey | Light Green | Grey | Light Orange |
| Total Regional Travel Cost | | Medium-High | High | Medium-Low | Medium-Low | Low | Low | Medium | Medium |

Note: Green indicates better alignment with regional goals when compared to the Base scenario.

- VMT and Parking scenarios show the most positive changes, no negative changes
- Cordon and Roadway scenarios see some increases in delay and reductions in job access
- These results are before any discounts/exemptions, reinvestment of revenues, or iterations of program design

| Legend | |
|--------------|--------------------------|
| Dark Green | Large Positive Change |
| Medium Green | Moderate Positive Change |
| Light Green | Small Positive Change |
| Grey | Minimal Change |
| Light Orange | Small Negative Change |
| Dark Orange | Moderate Negative Change |
| Dark Red | Large Negative Change |

*Positive and Negative refer to progress toward regional goals, and not to numerical values (i.e. a reduction in VMT is "positive")

Expert Review Panel – April 22, 2021

- Panel agreed that Metro's methods were logical; findings were not surprising
- Pricing program should define the problem(s) to fix and focus on those
- Pricing projects must build equity in from the start and must conduct detailed analysis to see where benefits and impacts occur, and to whom
- Public support often changes over time – early (moderate), right before implementation (very low), after implementation (moderate to high)

UPDATED 6/3/21 DRAFT Summary of RCPS Recommended Considerations

For Policy Makers

- Congestion pricing has been used in multiple cities to improve mobility and reduce emissions. Our study demonstrated how these tools could work in the Greater Portland Region with our land use and transportation system.
- Congestion pricing has a strong potential to help the Greater Portland Region meet the priorities outlined in its 2018 Regional Transportation Plan, specifically addressing congestion and mobility; climate; equity; and safety.
 - Technical analysis showed that all four types of pricing analyzed improved performance in these categories
 - Best practices research and input from experts showed there are tools for maximizing performance and addressing unintended consequences.
- Further policy development and refinement of the findings and recommendations should be incorporated into the update of the Regional Transportation Plan in 2023.
- Clarity around the goals and outcomes desired by the region and implementing agencies is essential from the beginning of any congestion pricing effort.
 - Optimizing for one priority or another could lead to different outcomes. Meaning, optimizing for mobility, for revenues, for equity could lead to the selection of a different program design or even a different type of pricing strategy.
- Carefully consider the specifics of how the benefits and costs of congestion pricing impact different geographic and demographic groups.
- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. Similarly, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at a local and **regional scale** and address both local and regional priorities as pricing programs have benefits and impacts across the region.

For Future Project Owners/Operators

- Congestion pricing has been shown to address issues of mobility, greenhouse gas emissions, equity, and safety where it has been applied.
- Clarity around goals and outcomes desired at the beginning of a project is essential to the success of achieving them. Optimizing for one priority over another can lead to different outcomes.
- The success of a project or program is largely based on “how” it is developed and implemented.
- Methodology is important – analysis needs to be detailed to understand how to:
 - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety) and
 - address unintended consequences (diversion and related congestion on nearby routes, slowing of buses; potential safety issues, and equity issues).
- Meaningful engagement and an extensive outreach campaign is required to develop a project that works and will gain public and political acceptance.
- A pricing project should build equity, safety, and affordability into the project definition so a holistic project that meets the need of the community is developed rather than adding “mitigations” later.
- Ongoing monitoring of performance is necessary to adjust and optimize a program once implemented.

2024-2027 STIP Highway Enhance Program

Overview

The Oregon Transportation Commission (OTC) has approved \$65 million for a competitive Enhance Highway Discretionary Program (Enhance Program) for the 2024-2027 Statewide Transportation Improvement Program (STIP). The Enhance Program will make operational enhancements to state highways to improve the movement of people and goods in order to enhance the economy of Oregon. The funds will be distributed around the state to eligible projects that can make tangible improvements. The OTC has dedicated at least 30% of the funds to rural areas (outside Metropolitan Planning Organization (MPO) boundaries.)

The OTC created this program because it believes that congestion is an issue that affects the entire state and the mobility of people and freight is critical to Oregon's economy. At the same time, the OTC is aware that Oregon has many long-standing unmet needs on the highway system, and the Enhance Program will support the Strategic Action Plan (SAP) priorities.

Program Expectations

As with other STIP programs, effective communications among ODOT staff and with stakeholders is essential to have Enhance Program projects ready to fund in the 2024-2027 STIP. Regions should use this program introduction to begin conversations about possible projects with their ACTs and MPOs. Regions each have preferred procedures for how they communicate with their ACT; Regions should follow their preferred process and adapt as needed to ensure that the ACT, MPO, and other stakeholders can provide valuable input.

Project proposals must come from ODOT Region or central program staff (e.g. Fix-It program, Freight program, Commerce and Compliance, Public Transportation, etc.) Program staff should communicate with the affected Region about possible Enhance highway projects in the Region. Regions can then help communicate these possible projects to Area Commissions on Transportation (ACTs) and MPOs, who can provide input on Enhance Program project ideas. Projects may receive recommendations from the ACTs, MPOs, local governments, tribes, and other stakeholder groups, but ultimately project proposals will be developed, selected, and submitted by ODOT staff. Regions may submit any letters of support with their project proposals, but these are not required.

It is important to remember that funding is limited and projects that best meet the criteria and intent of this program will be selected. The OTC intends for this limited program to make useful, strategic investments that address known needs and improve congestion or freight conditions. Region and central program staff should therefore use judgment and creativity regarding projects to propose. For example, Regions and programs should think strategically about potential projects to propose; if there are several good options, consider submitting a small variety of project proposals. A Region may have more chance of having a project selected if there are a couple different small and mid-sized project proposals submitted. A variety of projects will likely be needed to ensure that the \$65 million is allocated and the minimum 30% non-MPO target is met. However, Regions should not submit every possible project as the Enhance program is designed for targeted improvements and most of the money is not likely to go to one Region. Similarly, not all Regions may have an Enhance Program project selected this STIP cycle. Regions should also consider whether a proposed project can leverage other resources, such as local matching funds or federal funds already available. Projects that can leverage other funds to provide a more substantial benefit to the system may have an advantage.

In addition, the Governor’s Executive Order on Climate (20-04), requires that greenhouse gas emissions must be considered as part of project selection and the STIP decision making process. Climate and social equity are also identified as priorities in the SAP, and investment decisions need to optimize outcomes in these areas when possible. Project applications should identify the potential direct and indirect climate and social equity impacts of a project and detail appropriate mitigation strategies. The Climate Office will collect information on proposed Enhance projects and provide qualitative results and mitigation suggestions to support project scoping teams.

Project Selection Process and Preliminary Schedule

An Enhance Program project proposal form and contacts will be provided to ODOT Region and central program staff following this initial program introduction. Proposals will consist of the standard project business case form and a short additional form addressing Enhance Program criteria. Proposals must be developed by ODOT Region and central program staff, including project description, anticipated project benefits, and preliminary cost information. An internal cross-divisional Enhance Proposal Review Team (EPRT) will evaluate and rank the proposals to develop a 125% list totaling approximately \$80 million in projects. Region staff will also be responsible for completing the Climate Office GHG Index Survey for projects on the 125% list. Regions will provide the GHG Index Report to the scoping teams and back to the EPRT for consideration in final project scoping and selection.

Regions will bring this statewide 125% project list back to the ACTs and MPOs for any additional input that can help inform updated proposals, in the same manner as Regions do for other STIP projects. During the scoping process, Regions will develop more refined cost estimates, via the Cost Estimating Tool used for other programs. After scoping, Regions will submit updated proposals to the EPRT. This team will then rank the final project proposals and select the recommended projects to be included in the draft STIP.

The table below shows a preliminary schedule for the Enhance Program for the remainder of 2021 and early 2022. This shows the general outline and target timeline of the Enhance Program project selection process, but the schedule may be further refined, especially as regards the scoping process and subsequent steps. These could be adjusted, if needed, to better allow for identification of leverage and other opportunities.

| Timeframe | Activity |
|-------------------|---------------------------------------------------------------------|
| Begin May 2021 | ODOT announces Enhance Program |
| May-July | Regions seek input from ACTs, MPOs on possible projects |
| End Aug | Proposals Due |
| Early Sept | EPRT review to 125% |
| Sept-Nov | Scoping, Climate GHG Index Survey |
| Dec 2021-Jan 2022 | Regions seek input from ACTs, MPOs on scoped projects |
| Early Feb | Updated proposals with cost information, Climate Survey results due |
| Feb-Mar | Final EPRT 100% selections Draft STIP |

Eligible Projects and Selection Criteria

Eligibility

Eligible projects must:

- Address congestion relief or freight mobility,
- Be located on a state highway, and
- Be consistent with an existing statewide, regional, or local plan.

Multimodal elements should not be the primary focus of proposed projects, but these may be eligible for funding as part of a larger highway project. Projects that include only project planning, development, design, and preliminary engineering activities and do not include a construction phase are eligible, however, there is a higher emphasis on construction projects.

2024-2027 STIP Enhance Project Selection Criteria

1. Eligibility

Projects must be located on a state highway, be consistent with a plan, and provide benefits in one or both of the following outcome areas to be eligible for funding.

- Congestion relief—Reduce hours of delay on state highways, improve traffic flow/reliability, address a system bottleneck, and or improve the efficiency of the highway segment.
- Freight mobility—Reduce freight delay, address a known freight bottleneck, remove barriers or pinch points to improve movement on key freight corridors, address truck parking needs, or improve freight efficiency within or through regulatory facilities.

2. Additional Benefits

In addition to the eligibility criteria above, projects will be evaluated in terms of their benefits in other important outcome areas. Projects need not provide benefits in all outcome areas.

- Safety—Reduce fatalities and serious injuries.
- Multimodal accessibility—Improve the ability to access key locations by non-automobile modes.
- Equity—Improve economic and social well-being for Black, Indigenous, People of Color (BIPOC), low-income Oregonians, and others who have been marginalized.
- Climate mitigation and adaptation and sustainability—Reduce or minimize negative impacts to climate and the environment, implement adaptation measures, or improve system sustainability.

Illustrative List of Types of Projects Eligible

This list is provided to show examples of possible 2024-2027 STIP Enhance projects. It is not meant to list all possible types of projects.

- Auxiliary lanes
- Passing lanes
- Truck climbing lanes
- Truck parking
- Interchange improvements
- Intelligent transportation systems (ITS) and other applications of technology to improve safety, operations, and efficiency and reduce congestion
- Freight corridor improvements (including curve corrections, vertical clearance improvements, and other projects for over dimension trucks on key freight corridors)
- Intermodal freight connections (e.g. from roads to ports or railyards)

2024-2027 Statewide Transportation Improvement Program



Transportation Policy Alternatives Committee

June 4, 2021



2024-2027 STIP



24-27 STIP: OTC Allocations



The Oregon Transportation Commission (OTC) adopted “programmatic allocations” for the 2024-27 (STIP) in January 2021.



Scoping

Cost and risk estimation for proposed projects

Refine definition of projects

Helps match final project list with available budget

- Managers of programs (e.g., “Bridge”) produce project lists for scoping
- Technical teams investigate batches of projects on a rolling basis
- In Region 1, the first batch kicked off in May 2021
- Process will stretch through the remainder of the year
- Region 1 is preparing to launch a STIP website in June that will include the lists of projects in each program



2024-27 STIP Enhance Highway Discretionary



Overview

1. STIP Enhance Highway
2. Developing the draft Region 1 proposal
3. Schedule





What is Enhance Discretionary?

- **\$65M highway operational enhancements** in 24-27 STIP
 - **30%** dedicated to rural areas (outside MPOs)
 - Improve **congestion** or **freight** conditions
 - Benefit safety, accessibility, equity and/or climate outcomes
 - Communication with ACTs, MPOs, other stakeholders
 - Projects that **leverage matching funds** may have advantage



How was the draft Region 1 list created?

Region 1 Proposed Strategy:

- Identify approximately \$30M of highway investments
 - Geographically distributed throughout Region 1
 - Include rural projects
- Apply STIP Enhance Highway Discretionary requirements and considerations
- Consider project cost and readiness



Schedule

| Process Step | Timeframe |
|---------------------------------------------------------------------|-----------------------|
| ★ ODOT seeks input from ACTs, MPOs on possible projects | June - August |
| Proposals due from ODOT staff | End of August |
| ODOT will generate a draft project list totaling about \$80 million | Early September |
| Project scoping and GHG analysis | September-November |
| Input from ACTs, MPOs on scoped projects | December-January 2022 |
| Final project list totaling \$65 million | February-March 2022 |

A worker in an orange safety suit and hard hat is standing on a blue scissor lift, working on a steel bridge structure. The background is a dense forest of trees. The image is dimly lit, with the text overlaid in white.

Questions, comments, or suggestions?

A person wearing an orange safety vest is standing on a blue lift bucket, working on a large metal structure, likely a bridge or overpass. The background shows a dense forest of trees.

Jon Makler
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