



600 NE Grand Ave.
Portland, OR 97232-2736

Joint Policy Advisory Committee on Transportation (JPACT) agenda

Thursday, July 15, 2021

7:30 AM

<https://zoom.us/j/91720995437>

1. Call to Order, Declaration of a Quorum & Introductions (7:30 AM)

Please note: To limit the spread of COVID-19, Metro Regional Center is now closed to the public. This meeting will be held electronically. You can join the meeting on your computer or other device by using this link: <https://zoom.us/j/91720995437> or by calling +1 917 2099 5437 or 888 475 4499 (toll free).

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-797-1916 or email at legislativecoordinator@oregonmetro.gov.

2. Public Communications (7:35 AM)

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00 pm on the Wednesday before the meeting will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-797-1916 and providing your name and the item on which you wish to testify; or (b) registering by email by sending your name and the item on which you wish to testify to legislativecoordinator@oregonmetro.gov. Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3. Updates from the Chair (7:40 AM)

4. Consent Agenda (7:45 AM)

- 4.1 Resolution No. 21-5188, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to mend or Add Three Projects Impacting Gresham and ODOT Ensuring Required Federal Approvals and Phase Obligations Cans Occur Before the End of the Federal Fiscal Year (JL21-12-JULN) [COM](#)
[21-0455](#)
- Attachments: [Draft Resolution 21-5188](#)
[Exhibit A to 21-5188](#)
[JPACT Staff Report](#)
- 4.2 Resolution No. 21-5191, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Add Trimet’s Division Transit Project Which was Awarded \$12,963,076 From the American Rescue Plan Act of 2021 (JL21-13-JUL2) [COM](#)
[21-0460](#)
- Attachments: [Draft Resolution 21-5191](#)
[Exhibit A to Resolution 21-5191](#)
[JPACT Staff Report](#)
- 4.3 Resolution No. 21-5192, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Add ODOT’S Interstate 205- Abernethy Bridge Improvement Segment Which Includes \$375 Million of Construction Phase Funding (JL21-14-JUL3) [COM](#)
[21-0459](#)
- Presenter(s): Margi Bradway (she/her), Metro
Ted Leybold (he/him), Metro
- Attachments: [Draft Resolution No. 21-5192](#)
[Exhibit A to Resolution No. 21-5192](#)
[JPACT Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
-

- 4.4 Regional Mobility Policy Update - Recommendation to Test Potential Mobility Policy Measures Through Case Studies [COM](#)
[21-0461](#)

Attachments: [JPACT-memoRMP](#)
[1-RMPElementsandMeasuresfortesting](#)
[2-RMP-Potential Measures Definitions063021](#)
[3-RMP-Criteria for Evaluating Measures](#)
[4-RMP-Case Study Locations](#)
[5-RMP-Spring-2021-engagement-report -06222021](#)
[6-Appendices-RMP-Engagement-Summary-Spring-2021](#)

- 4.5 Consideration of the June 17, 2021 JPACT Minutes [COM](#)
[21-0454](#)

Attachments: [061721 JPACT Minutes Draft-signed](#)

5. Action Items (7:50 AM)

- 5.1 Resolution No. 21-5179 For the Purpose of Accepting the Findings and Recommendation in the Regional Congestion Pricing Study [COM](#)
[21-0452](#)

Presenter(s): Elizabeth Mros-O'Hara (she/her), Metro

Attachments: [JPACT Memo](#)
[RCPS Final Report](#)
[Resolution No. 21-5179](#)
[Staff Report](#)

- 5.2 Resolution No. 21-5194 For the Purpose of Adopting the 2025-2027 Regional Flexible Funds Program Direction for the Portland Metropolitan Area (8:20 AM) [COM](#)
[21-0453](#)

Presenter(s): Daniel Kaempff, Metro

Attachments: [Resolution 21-5194](#)
[2025-27 RFFA Program Direction for JPACT](#)
[RFFA program direction memo to JPACT](#)
[JPACT Staff Report](#)
[RFFA and Trails merge description\(jpact final\)](#)

6. Updates from JPACT Members (8:55 AM)

7. Adjourn (9:00 AM)

Upcoming JPACT Meetings

August 19, 2021

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit www.oregonmetro.gov/civilrights or call 503-797-1536. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at www.trimet.org.

Thông báo về sự Metro không kỳ thị của

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong www.oregonmetro.gov/civilrights. Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт www.oregonmetro.gov/civilrights. або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

Metro의 不歧视公告

尊重人權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站 www.oregonmetro.gov/civilrights。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamaataa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo www.oregonmetro.gov/civilrights. Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullanka dadweynaha, wac 503-797-1700 (8 gallinka hore illaa 5 gallinka dambe maalmaha shaqada) shan maalmo shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수 www.oregonmetro.gov/civilrights. 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

Metro의 差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、www.oregonmetro.gov/civilrights。までお電話ください。公開会議で言語通訳を必要とされる方は、Metroがご要望に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

إشعار بعدم التمييز من Metro

تحتزم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يرجى زيارة الموقع الإلكتروني www.oregonmetro.gov/civilrights. إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 503-797-1700 (من الساعة 8 صباحاً حتى الساعة 5 مساءً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang www.oregonmetro.gov/civilrights. Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a www.oregonmetro.gov/civilrights. Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте www.oregonmetro.gov/civilrights. Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

Avizul Metro privind nediscriminarea

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați www.oregonmetro.gov/civilrights. Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv 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 JPACT Work Program

As of 7/1/21

Items in italics are tentative

<p><u>July 15, 2021</u></p> <ul style="list-style-type: none"> • Resolution 21-5188, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to mend or Add Three Projects Impacting Gresham and ODOT Ensuring Required Federal Approvals and Phase Obligations Cans Occur Before the End of the Federal Fiscal Year (JL21-12-JULN) (consent) • Resolution No. 21-5191, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Add Trimet’s Division Transit Project Which was Awarded \$12,963,076 From the American Rescue Plan Act of 2021 (JL21-13-JUL2) (consent) • Resolution No. 21-5192, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Add ODOT’S Interstate 205- Abernethy Bridge Improvement Segment Which Includes \$375 Million of Construction Phase Funding (JL21-14-JUL3) (Margi Bradway (she/her) & Ted Leybold (he/him), Metro; 20 min) • Congestion Pricing-FINAL REPORT & ACTION (Elizabeth Mros-O’Hara, 30 min) • Final Program Direction for RFFA 2025-27 – ACTION (30 min, Daniel Kaempff) 	<p><u>August 19, 2021</u></p> <ul style="list-style-type: none"> • <i>Safe Routes to School – update (20, Noel Mickelberry)</i> • <i>Progress on our Regional Traffic Safety goals – update (20 min. Lake McTighe)</i> • <i>Active Transportation Return on Investment Study (20 min, John Mermin)</i>
<p><u>September 16, 2021</u> –<i>start of 2 hr. meetings</i></p> <ul style="list-style-type: none"> • Regional Mobility Policy Update – Introduce Case Study Findings and Recommendations – (40 min, Kim Ellis and ODOT staff) 	<p><u>October 21, 2021</u> <i>2 hr. meetings</i></p> <ul style="list-style-type: none"> • Emerging Transportation Trends – update (20 min., Eliot Rose)

	<ul style="list-style-type: none"> • Freight Commodity Study – (30 min, Tim Collins) • 2023 Regional Transportation Plan Update Work Plan – Kick-off Scoping Phase (30 min, Kim Ellis)
<p><u>November 18, 2021 2 hr. meetings</u></p> <ul style="list-style-type: none"> • TSMO Strategic Plan update- ACTION TO ADOPT (Caleb Winter, Metro; 30 min) 	<p><u>December 16, 2021 2 hr. meetings</u></p> <ul style="list-style-type: none"> • Regional Mobility Policy Update – Recommendations for 2023 RTP Update Work Plan and to the OTC - ACTION (30 min., Kim Ellis and ODOT staff) • 2023 Regional Transportation Plan Update Work Plan – ACTION (30 min, Kim Ellis) • <i>Progress on our Regional Traffic Safety goals – update (20 min. Lake McTighe)</i>

Parking Lot:

- *Hwy 26/Westside Transportation Study – briefing (20 min, Matt Bihn & ODOT)*
- *TV Highway Corridor Study – briefing (30 min, Eryn Kehe)*
Enhanced Transit Corridor (20 min, Matt Bihn)

**4.1 Resolution No. 21-5188, For the Purpose of
Amending the 2021-24 Metropolitan Transportation
Improvement Program (MTIP) to mend or Add Three
Projects Impacting Gresham and ODOT Ensuring
Required Federal Approvals and Phase Obligations
Cans Occur Before the End of the Federal Fiscal Year
(JL21-12-JULN)**

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-) RESOLUTION NO. 21-5188
24 METROPOLITAN TRANSPORTATION)
IMPROVEMENT PROGRAM (MTIP) TO AMEND) Introduced by: Chief Operating Officer
OR ADD THREE PROJECTS IMPACTING) Andrew Scott in concurrence with
GRESHAM AND ODOT ENSURING REQUIRED) Council President Lynn Peterson
FEDERAL APPROVALS AND PHASE)
OBLIGATIONS CAN OCCUR BEFORE THE END)
OF THE FEDERAL FISCAL YEAR (JL21-12-JUL))

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, the city of Gresham is adding \$987,831 of local funds to their Cleveland project supporting right of way requirements through this amendment which will allow them move forward and obligate the federal Right-of-Way (ROW) funds before the end of federal fiscal year 2021; and

WHEREAS, ODOT's OR 217 improvement project is ready to move into the Construction which first requires minor corrections and updates to the project milepost limits to ensure all project documents and the MTIP plus STIP match up, and

WHEREAS, project limit changes to ODOT's I-84 culvert repair and replace project now crosses into the Metro Metropolitan Planning Agency boundaries which triggers inclusion in the MTIP 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 July 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 July 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 July 9, 2021; and

WHEREAS, JPACT approved Resolution 21-5188 consisting of the July 2021 Formal MTIP Amendment bundle on July 15, 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 22, 2021 to formally amend the 2021-24 MTIP to include the required changes identified in the July 2021 Formal MTIP Amendment Bundle and Resolution 21-5188.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



Proposed July 2021 Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **JL21-12-JUL**
 Total Number of Projects: 3

Key Number & MTIP ID	Lead Agency	Project Name	Amendment Action	Added Remarks
UPWP Project Reprogramming Actions				
Project #1 Key 20808 MTIP ID 70878	Gresham	NE Cleveland Ave.: SE Stark St - NE Burnside	<u>COST INCREASE:</u> The formal amendment adds local funding to the ROW phase to address a phase funding shortfall. The amendment also advances the ROW to FFY 2021 to be obligated before the ends of FFY 2021	The Right-of Way phase is now expected to obligate its funds before the end of FY 2021.
Project #2 Key 18841 MTIP ID 70782	ODOT	OR217: OR10 - OR99W	<u>LIMITS UPDATES:</u> The formal amendment updates the project limits prior to moving forward into construction.	The amendment s a pre-construction clean-up action ensuring the MTIP and TSIP match-up with the various ODOT delivery documents. There is no scope change or cost adjustment as a result.
Project #3 Key 20363 MTIP ID TBD NEW PROJECT	ODOT	I-84: Corbett Interchange - Multnomah Falls	<u>ADD NEW PROJECT:</u> The existing Non-MPO project expanded its limits to now cross into the Metro Planning Area boundary which requires MTIP programming	The project will rehabilitate and replace culverts to repair damage and prevent road deterioration on I-84



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

Formal Amendment
COST INCREASE
 Increase ROW phase funding and
 advances to FFY 2021

Lead Agency: Gresham		Project Type:	Capital	ODOT Key: 20808	
Project Name: NE Cleveland Ave.: SE Stark St - NE Burnside Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated). Short Description: Complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters to improve safety and accessibility.	1	ODOT Type	Modern	MTIP ID: 70878	
		Performance Meas:	Yes	Status: 4	
		Capacity Enhancing:	No	Comp Date: 12/30/2023	
		Conformity Exempt:	Yes	RTP ID:	11096
		On State Hwy Sys:	No	RFFA ID:	50316
		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:	2019	Past Amend:	5
		Years Active:	3	OTC Approval:	No
		STIP Amend #: 21-24-0869		MTIP Amnd #: JL21-12-LUL	
		Detailed Description: Complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters.			
STIP Description: Complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters to improve safety and accessibility.					

Last Amendment of Modification: None. Administrative - AB21-05-DEC2, December 2020 - Reprogram ROW to FY 2022

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
STBG-U	Z230	2019		\$ 451,491				\$ 451,491
CMAQ	Z400	2022		-	\$ 376,569			\$ -
CMAQ	Z230	2021			\$ 376,569			\$ 376,569
STBG-U	Z230	2022					\$ 2,313,096	
								\$ -
							Federal Totals:	\$ 828,060
Federal Fund Obligations \$:				\$ 451,491				Federal Aid ID
EA Number:				PE003058				
Initial Obligation Date:				12/11/2018				
EA End Date:				12/31/2025				
Known Expenditures:				\$ 117,925				
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2019		\$ 51,675				\$ 51,675
Local	Match	2022			\$ 43,100			\$ -
Local	Match	2021			\$ 43,100			\$ 43,100
Local	OTH0	2021			\$ 987,831			\$ 987,831
Local	Match	2022					\$ 264,744	\$ 264,744
Other	OTH0	2022					\$ 687,528	\$ 687,528
							Local Total	\$ 952,272
Phase Totals Before Amend:			\$ -	\$ 503,166	\$ 419,669	\$ -	\$ 3,265,368	\$ 4,188,203
Phase Totals After Amend:			\$ -	\$ 503,166	\$ 1,407,500	\$ -	\$ 3,265,368	\$ 5,176,034
Year Of Expenditure (YOE):								\$ 5,176,034

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.
- > ROW phase increase equals a \$987,831 cost increase to the project which equals a 23.59% increase and is above the 20% threshold

Amendment Summary:

- The formal amendment adds local funding to the ROW phase to address the full costs for the phase. The amendment also advances the ROW to FFY 2021 to be obligated before the ends of FFY 2021. Full ROW requirements were not anticipated at initial programming. As they emerged through PS&E, the additional costs are now known. Local funds are being committed through this amendment to address the costs.
- > Will Performance Measurements Apply: Yes, Safety

RTP References:

- > RTP ID: 11096 - Cleveland - Burnside to Stark: Complete Build out
- > RTP Description: Reconstructs street from Stark to Burnside, with two travel lanes, center turn lane, bike lane, and sidewalk.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > CMAQ = Federal Congestion Mitigation Air Quality Improvement program funds. CMAQ funds are allocated to Metro for projects that clearly demonstrate air quality emission reductions.
- > Local = General local funds provided by the lead agency as part of the required match.
- > Other = Local funds committed above the required minimum match to the federal funds in support of the project phase. Often referred to as "overmatch funds"

Other

- > On NHS: No
- > Is the project modeled? - No, the project is not capacity enhancing and does not require air quality and transportation system modeling.
- > Is the project located on a modeled facility: Yes - Motor Vehicle Network
- > Model category and type: Cleveland Ave is identified as Minor Arterial in the network.
- > TCM project: No
- > Located on the CMP: No



Metro

2021-24 Metropolitan Transportation Improvement Program (MTIP)
PROJECT ADMINISTRATIVE MODIFICATION DETAIL WORKSHEET

Formal Amendment
LIMITS UPDATES
Additional Project Limits references
updated for STIP

Lead Agency: ODOT		2	Project Type:	Capacity	ODOT Key:	18841
Project Name: OR217: OR10 - OR99W			ODOT Type	Multiple	MTIP ID:	70782
			Capacity Enhancing:	No	Status:	5
Project Status: 5 = (RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation.			Conformity Exempt:	Yes	Comp Date	6/30/2023
			Performance Meas:	Yes	RTP ID:	12083
Short Description: On OR217: OR10 to OR99W, construct lane segments between existing aux lanes providing a NB & SB 3rd through lane, bridges refit, road rehab, and Hall Blvd widening. (Combines Key 21179, 20473 and 20474 into Key 18841) (HB2017 \$44 million award)			On State Hwy Sys:	OR217	RFFA ID:	N/A
			Mile Post Begin:	1.77	RFFA Cycle:	N/A
			Mile Post End:	6.32 7.24	UPWP:	No
			Length:	4.55 5.47	UPWP Cycle:	N/A
			1st Year Program'd:	2014	Past Amend:	12
		Years Active:	8	OTC Approval:	No	
		STIP Amend#: 21-24-0877			MTIP Amend#: JL-16-JUL	
Summary of Additional Project Limits Updates:						
<ol style="list-style-type: none"> OR99W: MP 8.56 to MP 8.70 = 0.14 miles OR 141: MP 2.60 to MP 2.84 = 0.24 miles.... Updated to be MP 2.60 to MP 4.80 = 2.20 miles OR 210: MP 9.16 to MP 9.24 = 0.08 miles.....Updated to be MP 9.13 to MP 9.38 = 0.25 miles I-5: MP 288.25 to MP 288.45 + MP 293.06 to MP 293.10 - Added update On Denny and Allen Blvd 						
Detailed Description: On OR217, add a southbound auxiliary lane from OR10 to OR99W and a northbound auxiliary lane from OR99W to SW Scholl's Ferry Rd (OR210). Driving surface overlay, protective screening, and rail retrofit on Allen Blvd and Denny Rd structures (bridge #16134, #16143) . Driving surface overlay, replace joints, and repair deteriorating concrete columns on OR210 over OR217 structure (bridge #09672). Widen the Hall Blvd (OR141) over OR217 overcrossing to allow for the addition of a sidewalk and bike lanes. Add bridge rail that meets current standards. Install signs and technology to capture traffic statistics and improve operations. (HB2017 \$44 million award)(Combines Keys 21179, 20473 and 20474 into Key 18841).						

STIP Description: On OR217, add a southbound auxiliary lane from OR10 to OR99W and a northbound auxiliary lane from OR99W to SW Scholl's Ferry Rd (OR210) to improve safety and traffic reliability. Pave road, add protective screening, and bridge updates on Allen Blvd and Denny Rd structures. Pave road, replace joints, and repair deteriorating concrete columns on OR210 over OR217 structure. Add sidewalks and bike lanes to the Hall Blvd (OR141) over OR217 overcrossing to improve bicycle and pedestrian connectivity. Add bridge rail that meets the current standards to the Fanno Creek Bridge. Install signs and technology to capture traffic statistics and improve operations. Add a signal pole base and conduit to the design of the Hall Blvd Bridge replacement.

LAST Amendment or Admin Mod:

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other	Construction	Total
Federal Funds								
HSIP	MS30	2014		\$ 758,254				\$ 758,254
HSIP 100%	ZS30	2014		\$ 1,934,451				\$ 1,934,451
State STBG	Z240	2014		\$ 4,312,696				\$ 4,312,696
Repurposed Earmark	RPF0	2014		\$ 80,610				\$ 80,610
AC-STBGS	ACPO	2014		\$ 9,285,444				\$ 9,285,444
AC-STBGS	ACPO	2020			\$ 2,691,900			\$ 2,691,900
AC-STBGS	ACPO	2019				\$ 717,840		\$ 717,840
State STBG	Z240	2021					\$ 21,194,979	\$ 21,194,979
AC-HB2017	ACPO	2021					\$ 76,654,104	\$ 76,654,104
Note:							Federal Totals:	\$ 117,630,278
Fund Obligations Amount:				\$ 16,371,455	\$ 2,691,900	\$ 717,840		Federal Aid ID
EA Number:				PE002386	R9465000	C1341504		S144(026)
Initial Obligation Date:				5/15/2014	11/21/2019	5/2/2019		
Known Expenditures:				N/A	N/A	N/A		
EA End Date:				N/A	N/A	N/A		

State Funds								
State (STBG)	Match	2014		\$ 493,607				\$ 493,607
State (RFPO)	Match	2014		\$ 9,226				\$ 9,226
State (AC)	Match	2014		\$ 1,015,586				\$ 1,015,586
State (AC)	Match	2020			\$ 308,100			\$ 308,100
HB2017	S070	2019				\$ 800,000		\$ 800,000
State (AC)	Match	2019				\$ 82,160		\$ 82,160
State (STBG)	Match	2021					\$ 2,425,860	\$ 2,425,860
State (AC)	Match	2021					\$ 8,773,405	\$ 8,773,405
BIKEWAYS	S080	2021					\$ 1,968,019	\$ 1,968,019
							State Total:	\$ 15,875,963
Local Funds								
Local (HSIP)	Match	2014		\$ 63,969				\$ 63,969
Other	OTH0	2014		\$ 3,046,158				\$ 3,046,158
Other	OTH0	2021					\$ 2,059,770	\$ 2,059,770
								\$ -
							Local Total	\$ 5,169,897
Phase Totals Before Amend:			\$ -	\$ 21,000,001	\$ 3,000,000	\$ 1,600,000	\$ 113,076,137	\$ 138,676,138
Phase Totals After Amend:			\$ -	\$ 21,000,001	\$ 3,000,000	\$ 1,600,000	\$ 113,076,137	\$ 138,676,138
							Year Of Expenditure (YOE):	\$ 138,676,138

Notes and Changes

> Exempt Status: The project is not exempt and a capacity enhancing project and has completed required air conformity analysis. Transportation modeling an air quality analysis was completed as part of the 2018 RTP Update.

Reason for Modification and Summary of Changes plus Impacts:

The formal amendment updates the project limits prior to moving forward into construction. There is no scope change or cost adjustment required. The MP limit updates ensure the project limits are completely identified. The net result of the project limit changes exceed 0.25 miles which triggers the formal MTIP Amendment.

References and Additional Notes:

- > 2018 RTP ID: 11986 - OR 217 Northbound Auxiliary Lane 99W to Scholls Ferry (CON)
- > RTP Description: Extend OR 217 Northbound (NB) auxiliary lane from OR 99W to Scholls Ferry. Construction (CON) phase.
- > Modeling network: Yes, Motor Vehicle Network
- > Model Type: The project is modeled as a capacity enhancing project on OR 217. OR217 is identified as Throughway in the network

Fund Type Codes:

- > HSIP = Federal Highway Safety Improvement Program funds appropriated to ODOT and intended to support safety related improvements
- > Repurposed Earmark: Federal funds initially awarded under a specific earmark identification and purpose. Periodically, if the earmark is not completely obligated and expended, FHWA or Congress will authorize a change in eligibility for the funds resulting in re-designating the remaining earmark as a "Repurposed Earmark"
- > AC-STBGS = A federal fund placeholder referred to as Advance Construction The AC fund code allows the project to continue obligating and expending funds until the final federal fund code is determined. "AC-STBGS" refers to the expected conversion will be State STBG (Federal State Surface Transportation Block Grant funds that will replace the Advance Construction designation).
- > AC-HB2017 = A federal placeholder fund type code used as described above for the AC-STBGS fund type code.
- > State = General State funds provided by the lead agency as part of the required match.
- > BIKEWAYS: State funds reserved for bicycle lane/safety related improvements.
- > HB2017 - State allocated funds from HB 2017 normally for specifically identified HB2017 eligible projects.
- > Other (Local) funds = Local funds to support the project phase which are above the require match.
- > Local = General local funds used in support of the require match to the federal funds.

Other:

- > NHS: Yes
- > TCM Project: No
- > On CMP: Yes
- > Performance Measurements Apply: Yes - subcategory = Multiple including safety
- > RTP Goal(s): Goal 5 - Safety and Security
- > RTP Goal Description: Objective 5.1 - Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.
- > ODOT Local Agency Liaison: N/A
- > Project Manager: N/A
- > Added Remarks: N/A



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

Formal Amendment
ADD NEW PROJECT
Add ODOT I-84 culvert repair project
to MTIP

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 20363
Project Name: I-84: Corbett Interchange - Multnomah Falls	3	ODOT Type: Structures	MTIP ID: TBD
		Performance Meas: No	Status: 4
		Capacity Enhancing: No	Comp Date: 6/30/2023
		Conformity Exempt: Yes	RTP ID: 12093
		On State Hwy Sys: I-84	RFFA ID: N/A
		Mile Post Begin: 20.00	RFFA Cycle: N/A
		Mile Post End: 32.00	UPWP: No
		Length: 12.00	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 #: 21-24-0874	MTIP Amnd #: JL21-12-JUL		
Detailed Description: In the northeastern Metro area on I-84 from MP 20.00 to MP 32.00, reconstruct, rehabilitate, and replace culverts to prevent road deterioration			
STIP Description: Rehabilitation and replacement of culverts to repair damage and prevent road deterioration.			

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-NHPP (92.22%)	ACPO	2019		\$ 823,156				\$ 823,156
IM	L01E	2019		\$ 237,374				\$ 237,374
AC-NHPP (92.22%)	ACPO	2022					\$ 2,314,095	\$ 2,314,095
								\$ -
							Federal Totals:	\$ 3,374,625
Federal Fund Obligations \$:				\$ 1,060,530				Federal Aid ID
EA Number:				PE003141				S002(237)
Initial Obligation Date:				9/11/2019				
EA End Date:				N/A				
Known Expenditures:				N/A				
State Funds								
State	Match	2019		\$ 69,444				\$ 69,444
State	Match	2019		\$ 20,026				\$ 20,026
State	Match	2022					\$ 195,225	\$ 195,225
								\$ -
							State Total:	\$ 284,695
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 1,150,000	\$ -	\$ -	\$ 2,509,320	\$ 3,659,320
							Year Of Expenditure (YOE):	\$ 3,659,320

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 ODOT culvert repair project to the MTIP now that it crosses into the Metro MPA.

Amendment Summary:

The formal amendment adds the existing non-MPO STIP project for ODOT into the MTIP. The project's limits were expanded to the west on I-84 and now cross into the Metro Planning Area boundary. This project now requires MTIP programming.

- > Will Performance Measurements Apply: Yes, Safety

RTP References:

- > RTP ID: 12093 - Culvert Replacement and Repair
- > RTP Description: Repair and replacement of culverts that have or are in danger of failure, do not provide adequate drainage or are a habitat barrier to Threatened & Endangered species that do not add motor vehicle capacity.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature.
- > 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:

- > AC-NHPP = A federal fund type placeholder referred to as Advance Construction allows a phase to be obligated and move when the federal funds are not yet determined. AC-NHPP refers to the expectation that the final federal fund type code will be National Highway Performance Program funds. A fund conversion will occur later.
- > IM = Federal Interstate Maintenance funds. IM funds are appropriated to ODOT for use on the highway system in support of various upgrades and maintenance needs.
- > State = General state funds provided by the lead agency as part of the required match.

Other

- > On NHS: Yes. I-84 is designated part of the Eisenhower Interstate System
- > Does the project require transportation and air quality analysis modeling? - No. The project is exempt.
- . Is the project located on a Metro modeled facility? - Yes.
- > Metro Model: Motor Vehicle Network
- > Model category and type: I-84 is designated as a "Throughway"
- > TCM project: No
- > Located on the CMP: Yes

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: July 9, 2021
To: JPACT and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: July 2021 MTIP Formal Amendment & Resolution 21-5188 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO AMEND OR ADD THREE PROJECTS IMPACTING GRESHAM AND ODOT ENSURING REQUIRED FEDERAL APPROVALS AND PHASE OBLIGATIONS CAN OCCUR BEFORE THE END OF THE FEDERAL FISCAL YEAR (JL21-12-JUL)

BACKGROUND

What This Is:

The July 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment which is contained in Resolution 21-5188 and being processed under MTIP Amendment JL21-12-JUL.

What is the requested action?

TPAC received their official notification on July 9, 2021 and is providing an approval recommendation to JPACT for Resolution 21-5188 consisting of three projects impacting the city of Gresham and ODOT.

Proposed July 2021 Formal Amendment Bundle					
Amendment Type: Formal/Full					
Amendment #: JL21-12-JUL					
Total Number of Projects: 3					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 20808	70808	Gresham	NE Cleveland Ave.: SE Stark St - NE Burnside	Complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters to improve safety and accessibility.	<u>COST INCREASE:</u> The formal amendment adds local funding to the ROW phase to address the full costs for the phase. The amendment also advances the ROW to FFY 2021 to be obligated before the ends of FFY 2021.

ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #2 Key 18841	70782	ODOT	OR217: OR10 - OR99W	On OR217: OR10 to OR99W, construct lane segments between existing aux lanes providing a NB & SB 3rd through lane, bridges refit, road rehab, and Hall Blvd widening. (Combines Key 21179, 20473 and 20474 into Key 18841)	LIMITS UPDATES: The formal amendment updates the project limits prior to moving forward into construction. There is no scope change or cost adjustment required. The MP limit updates ensure the project limits are completely identified
Project #3 Key 20363 New Project	TBD	ODOT	I-84: Corbett Interchange - Multnomah Falls	Rehabilitation and replacement of culverts to repair damage and prevent road deterioration.	ADD NEW PROJECT: Changes in project limits from this original Non-Metropolitan Planning Area (MPA) project now cross into the MPA which triggers the need to be included in the MTIP

JULY 2021 FORMAL MTIP AMENDMENT AND FEDERAL FISCAL YEAR CLOSE-OUT ACTIONS

The July 2021 Formal MTIP Amendment represents the last formal amendment for federal fiscal year (FFY) 2021. Submitted amendments represent required changes to projects that either will be obligating a phase before the end of FFY 2021, or need a federal approval step to occur before the end of FY 2021. Final approval for this amendment should occur during early August 2021 allowing time to complete the phase obligation or federal approval action before the federal fiscal close-out occurs starting on September 1, 2021.

Through August, ODOT staff will be busy preparing the various end of federal fiscal year close-out programming support actions which include:

- Preparing project phase obligation requests.
- Submitting project obligation requests to FHWA.
- Completing a flex transfer process for FHWA based funds over to FTA enabling the funds to be approved in FTA’s grant/obligation approval system.
- Completing final FFY 2021 project administrative modifications to the MTIP and STIP
- Developing and reviewing actual project phase obligations against established obligation targets.
- Determining which project phases will not obligate their federal funds and need to slip to the next federal fiscal year.

As a result of the above actions, MTIP Formal Amendments cease after the July Formal Amendment due to lack of time to complete all review and processing actions. Administrative modifications will stop normally during early August. The emphasis for ODOT as of August is phase obligations, completing required FFY 2021 federal approval actions, and implementing end-of-year close-out processes.

As of September 1, 2021, ODOT is required to have completed all end of fiscal year obligation submissions to FHWA. During September, FHWA will approve the final obligations and complete their required fiscal year close-out actions. The federal transportation delivery process effectively shuts down for local agencies during September while FHWA and FTA complete their close-out responsibilities.

As of October 1st, the next federal fiscal year begins. The federal transportation project delivery process slowly comes alive again. By the beginning of November, the federal transportation delivery process is normally back up and operating at full capacity.

A detailed summary of the SFY 2022 UPWP projects amended are provided below. There are 7 projects impacted:

Project 1: NE Cleveland Ave.: SE Stark St - NE Burnside	
Lead Agency:	Gresham
ODOT Key Number:	20808 MTIP ID Number: 70878
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro SFY 2022 UPWP Project:</u> No • <u>Proposed improvements:</u> The NE Cleveland Ave improvement project will complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters to improve safety and accessibility. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Increase funding to the Right-of- Way (ROW phase to address ROW phase costs and enable the project to obligate the ROW phase before the end of federal fiscal year (FFY) 2021. • <u>Funding:</u> The NE Cleveland Ave.: SE Stark St - NE Burnside improvement project is a 2019-21 Metro Regional Flexible Funds Allocation (RFFA) awarded project containing federal Surface Transportation Block Grant (STBG) and Congestion Mitigation Air Quality (CMAQ) improvement funds along with local matching and overmatching funds. • <u>FTA Conversion Code:</u> N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: In Gresham on Cleveland Ave ○ Cross Street Limits: Stark Street to Burnside Rd ○ Overall Mile Post Limits: N/A • <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 – Projects that correct, improve, or eliminate a hazardous location or feature. • <u>Regional Significance Status:</u> The project is regionally significant. Includes federal funds and provides transportation improvements to a facility which is identified as a “Minor Arterial” in the Metro Motor Vehicle modeling network

- **Amendment ID and Approval Estimates:**
 - STIP Amendment Number: 21-24-0869
 - MTIP Amendment Number: JL21-12-JUL
 - OTC approval required: No.
 - Metro approval date: Tentatively scheduled for July 22nd, or July 29th, 2021
 - Other required approvals: Gresham submitted a required Project Change Request (PCR) which was reviewed and approved by ODOT and Metro.

AMENDMENT ACTION: COST INCREASE:

The formal amendment adds \$987,831 of local funds to support the updated ROW phase costs and advances the ROW phase to FFY 2021. Early scoping for the project did not fully evaluate the ROW needs and underestimated the phase costs. Updated Preliminary Engineering (PE) design and delivery cost estimates now call out the added ROW requirements for the project. Through this amendment, the ROW will be able to move forward and be obligated before the end of FFY 2021.

What is changing?

Key 20808 ROW Funding Adjustments			
Key 20808 Existing ROW phase funding	Additional Local Funds Required for ROW Phase	Type of Funds Added to ROW Phase	Revised ROW Total Phase Cost
\$419,669	\$987,831	Local Funds	\$1,407,500

Additional Details:

Project Location Map

NE Cleveland Ave SE Stark St-NE Burnside
Vicinity Map

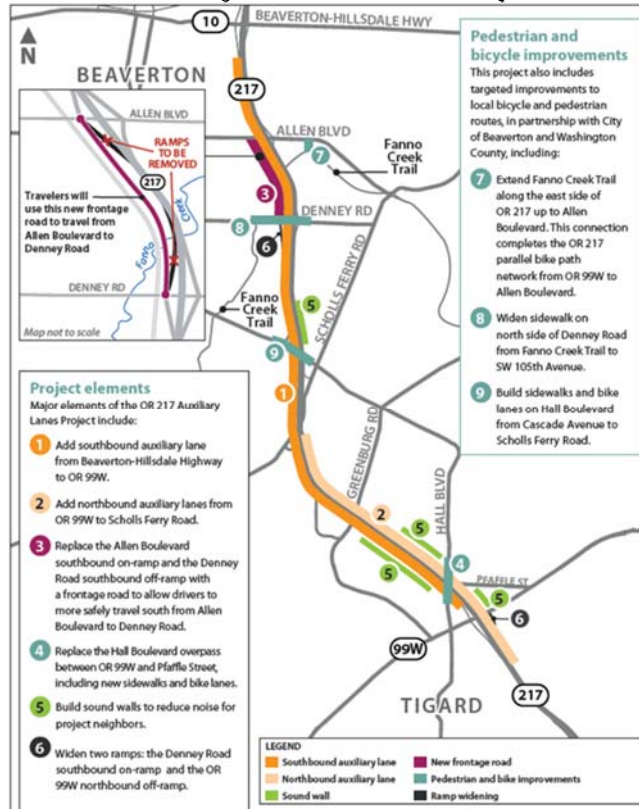
Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, cost increases above 20% for \$1 million dollar and above total project costs require a formal/full amendment to complete.
Total Programmed Amount:	The project's total programmed amount increases from \$4,188,203 to \$5,176,034
Added Notes:	N/A

Project 2: OR217: OR10 - OR99W	
Lead Agency:	ODOT
ODOT Key Number:	18841 MTIP ID Number: 70782
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro SFY 2022 UPWP Project:</u> No • <u>Proposed improvements:</u> The propose project in the OR217 corridor will construct lane segments between existing aux lanes providing a NB & SB 3rd through lane, bridges refit, road rehab, and Hall Blvd widening. (Combines Key 21179, 20473 and 20474 into Key 18841) (HB2017 \$44 million award) • <u>Source:</u> Existing project. • <u>Amendment Action:</u> providing final project limit updates to the MTIP and STIP ensuring all project limits are identified for the project. • <u>Funding:</u> The funding is primarily federal and state funds appropriated to ODOT. Committed federal and state funds include <ul style="list-style-type: none"> ○ Highway Safety Improvement Program (HSIP) ○ State Surface Transportation Block Grant Funds (STBG) ○ Repurposed Earmark ○ State HB2017 allocated funds ○ State Bikeways funds • <u>FTA Conversion Code:</u> N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Through the OR 217 Corridor ○ Cross Street Limits: Various ○ Overall Mile Post Limits: Multiple that include: <ul style="list-style-type: none"> ▪ OR 217: MP 1.77 to MP 7.24 ▪ OR99W: MP 8.56 to MP 8.70 ▪ OR 141: MP 2.60 to MP 4.80 ▪ OR 210: MP 9.13 to MP 9.38 ▪ I-5: MP 288.25 to MP 288.45 + MP 293.06 to MP 293.10 ▪ On Denny and Allen Blvd at OR 217 • <u>Current Status Code:</u> 5 (ROW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation.

	<ul style="list-style-type: none"> • <u>Air Conformity/Capacity Status:</u> The project is a capacity enhancing project. It is not exempt from air quality conformity analysis per 40 CFR 93.126, Table 2. The project completed the required transportation and air quality modeling analysis as part of the 2018 Regional Transportation Plan (RTP) update. It is identified in the constrained RTIP under IDs 11986, 11987, and 12019. • <u>Regional Significance Status:</u> The project is regionally significant • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0877 ○ MTIP Amendment Number: JL21-16-JUL ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for Early August, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: LIMITS UPDATES</u></p> <p>The formal amendment provides the final project limits update corrections to the project. The limits updates do not reflect a scope or cost change. As the project completes Plans Specifications and Estimates (PS&E) and finishes up the Preliminary Engineering phase, the final minor limit corrections are being updated in the MTIP and STIP. The OR 217 Improvement project intends to move forward and obligate the construction phase by the end of FFY 2021 (September 30, 2021). The corrections to the MTIP and STIP are needed to ensure the PS&E documents match up with the MTIP and STIP. The adjustments include various mitigation requirements that are part of the project.</p>
<p>Additional Details:</p>	<p style="text-align: center;"><u>Project Limit Updates to Key 18841</u></p> <ul style="list-style-type: none"> * I-5 / OR217 Pond – Hwy 144 (OR217) MP 7.14-7.24 - ADDED * OR217 sign bridge – replace sign on existing structure at Hwy 144 (OR217) MP 1.10 - ADDED * 72nd Ave – add ITS signs to the existing structure – Hwy 144 (OR217 Connection 2) MP 2C6.69-6.72 - ADDED * Haines Rd Interchange – add a pond – Hwy 001 (I-5 Connection 2) 2C 293.00 –293.10 - ADDED * Greenburg Rd – ADA ramps at the NB on/off ramp, add protective screening and add ITS signs This is a city street Lat/Long * 45.44431, -122.77704 to 45.444372, -122.777006 - ADDED

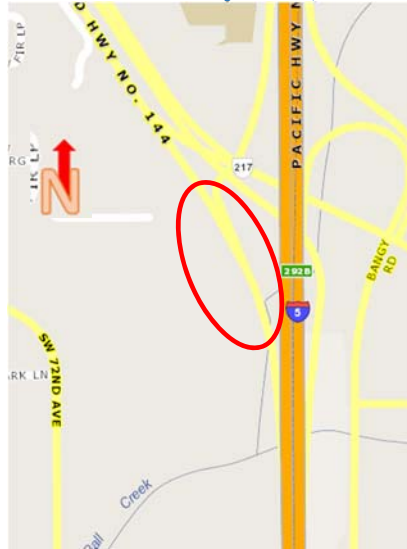
	<p>* I-5/I-205 Mandatory Disposal Site – Hwy 001 (I-5) MP 288.25 – 288.45 - ADDED</p> <p>* Hall Blvd Bridge Replacement – Hwy 141 (Hall Blvd) MP 4.60 – 4.80 - ADDED</p> <p>* Pfaffle Street 150 ft due to tie in to Hall Blvd Structure replacement – Lat/Long 45.43805, - 122.76541 to 45.43805, - 122.76477 - ADDED</p> <p>* OR99W illumination/ ADA ramps and installation of new ITS equipment on OR99W structure – Hwy 091 (OR99W) MP 8.56 – 8.70 ADDED</p> <p>* Scholls Hwy – Extend limits to include ramp terminal, ADA ramp and Guardrail (New mile points) – Hwy 143 (Scholls Hwy) MP 9.13 – 9.38 ADDED</p>
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, limits changes greater than 0.25 miles require a formal/full amendment</p>
<p>Total Programmed Amount:</p>	<p>The total programmed amount remains unchanged at \$138,676,138</p>
<p>Added Notes:</p>	<p>Project Location Maps reflecting updated and corrections are shown below</p>

Overall Project Location for Key 18841

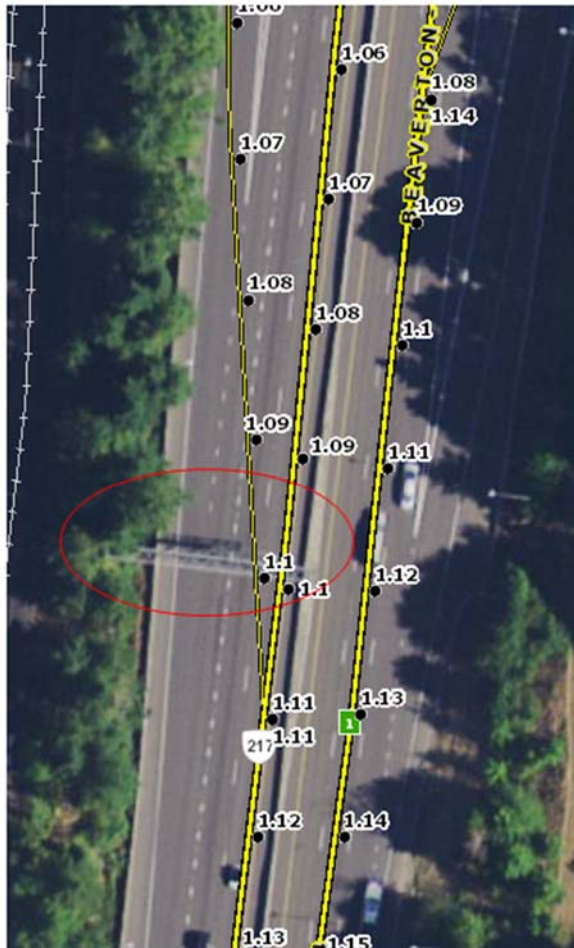


Main Adjusted/Added Project Limits as part of the Amendment Clean-up

I-5 / OR217 Pond – Hwy 144 (OR217) MP 7.14-7.24



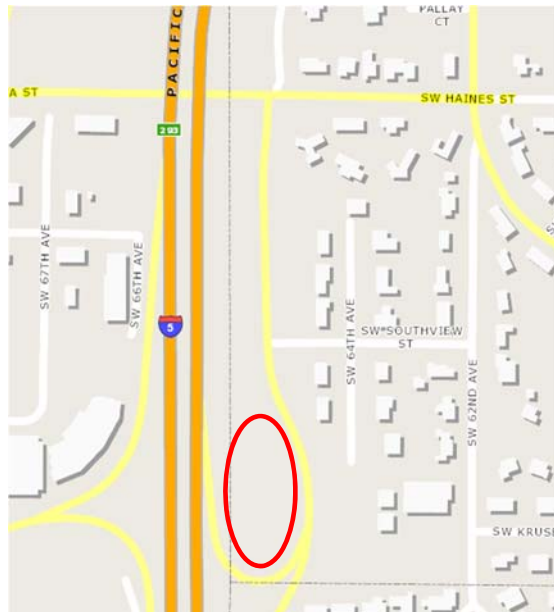
OR217 sign bridge – replace sign on existing structure at Hwy 144 (OR217) MP 1.10



72nd Ave – add ITS signs to the existing structure – Hwy 144 (OR217 Connection 2) MP 2C6.69-6.72



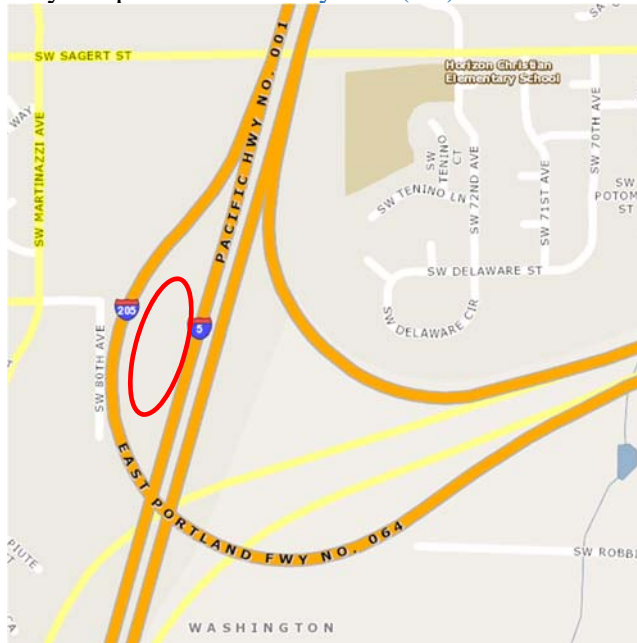
Haines Rd Interchange – add a pond – Hwy 001 (I-5 Connection 2) 2C 293.00 –293.10



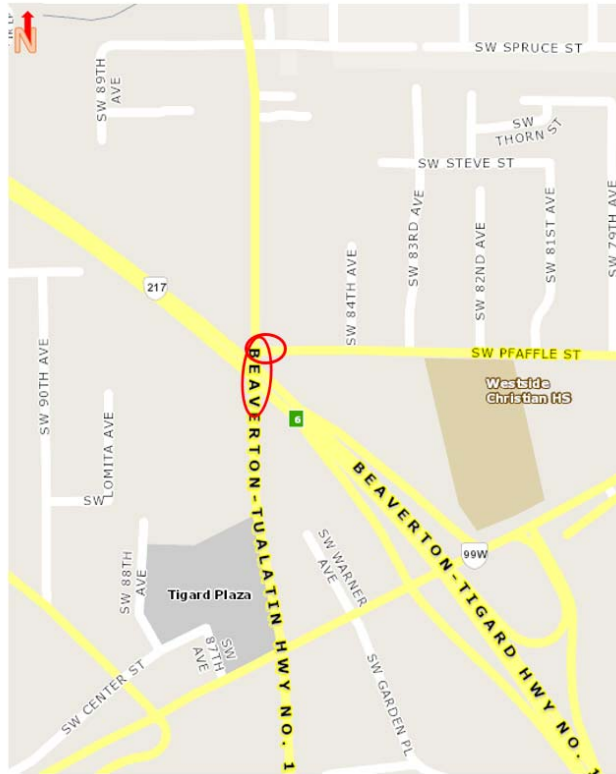
Greenburg Rd – ADA ramps at the NB on/off ramp, add protective screening and add ITS signs This is a city street [Lat/Long 45.44431, -122.77704 to 45.444372, -122.777006](#)



I-5/I-205 Mandatory Disposal Site – [Hwy 001 \(I-5\) MP 288.25 – 288.45](#)



Hall Blvd Bridge Replacement – Hwy 141 (Hall Blvd) MP 4.60 – 4.80 and Pfaffle Street 150 ft due to tie in to Hall Blvd Structure replacement – Lat/Long 45.43805, -122.76541 to 45.43805, -122.76477



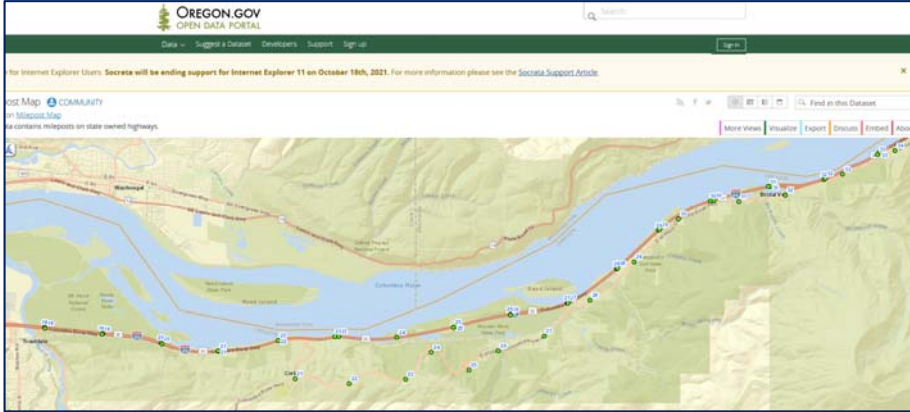
OR99W illumination/ ADA ramps and installation of new ITS equipment on OR99W structure – Hwy 091 (OR99W) MP 8.56 – 8.70



Scholls Hwy – Extend limits to include ramp terminal, ADA ramp and Guardrail (New mile points) – [Hwy 143 \(Scholls Hwy\) MP 9.13 – 9.38](#)



Project 3:		I-84: Corbett Interchange - Multnomah Falls (New Project)	
Lead Agency:	ODOT		
ODOT Key Number:	20363	MTIP ID Number:	New - TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro SFY 2022 UPWP Project:</u> No • <u>Proposed improvements:</u> The project will provide rehabilitation and replacement of culverts to repair damage and prevent road deterioration. • <u>Source:</u> New project. • <u>Amendment Action:</u> Add new project to the 2021-24 MTIP • <u>Funding:</u> The funding is primarily federal that will utilize a combination of Nation Highway Performance Program (NHPP) and Interstate Maintenance (IM) funds. The federal fund code, Advance Construction is being used as a placeholder for the NHPP. It is designated as AC-NHPP. • <u>FTA Conversion Code:</u> N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: On I-84 in northeastern Multnomah County ○ Cross Street Limits: Well east of the Sand River to the Corbett Interchange ○ Overall Mile Post Limits: MP 20.00 to MP 32.00 • <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 – Projects that correct, improve, or eliminate a hazardous location or feature. • <u>Regional Significance Status:</u> The project is regionally significant for being funded with federal funds and located in a designated “Eisenhower Intestate System” facility 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: JL21-16-JUL ○ OTC approval required: No. 		

	<ul style="list-style-type: none"> o Metro approval date: Tentatively scheduled for July 22nd or July 29th, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the new I-84 Culverts Repair and Replacement project to the 2021-24 MTIP. The project already is programmed in the 2021-24 STIP. The project limits were outside of the Metropolitan planning Area (MPA) boundary. A requested STIP amendment expanded the project limits west which now cross into the Metro MPA. With the revised project limits now in the Metro MPA, the project requires programming in the 2021-24 MTIP. The project is being programmed per requested amendment updates which includes an engineer’s cost update.</p>
<p>Additional Details:</p>	<p>Approximate Project Location and limits: MP Limits on I-84 are MP 20.0 to 32.0 in both directions</p>  <p>The screenshot shows the Oregon.gov Open Data Portal interface. At the top, it says 'OREGON.GOV OPEN DATA PORTAL'. Below that, there's a search bar and navigation links like 'Data', 'Support & Dataset', 'Developers', 'Support', and 'Sign in'. A warning message for Internet Explorer users is visible. The main content is a map titled 'OST Map' and 'COMMUNITY'. The map shows a geographical area with a river and several roads. A red line highlights a specific section of a road, likely I-84, indicating the project location and limits. The map includes various icons and a legend.</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 complete.</p>
<p>Total Programmed Amount:</p>	<p>The total programmed amount is \$3,659,320</p>
<p>Added Notes:</p>	

Note: The Amendment Matrix located below 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.

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.

- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
 - Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
 - Adheres to conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP.
 - Is eligible for special programming exceptions periodically negotiated with USDOT.
 - 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 July 2021 Formal MTIP amendment (JL21-12-JUL) will include the following:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	June 22, 2021
• TPAC notification and approval recommendation.....	July 9, 2021
• JPACT approval and recommendation to Council.....	July 15, 2021
• Completion of public notification process.....	July 21, 2021
• Metro Council approval.....	July 22 or July 29, 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 27 or August 5, 2021
• Submission of the final amendment package to USDOT.....	July 28 or August 5, 2021
• ODOT clarification and approval.....	Mid to late August 2021
• USDOT clarification and final amendment approval.....	Mid to late 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:

TPAC received their official notification on July 9, 2021 and is providing an approval recommendation to JPACT for Resolution 21-5188 consisting of three projects impacting the city of Gresham and ODOT.

No Attachments

**4.2 Resolution No. 21-5191, For the Purpose of
Amending the 2021-24 Metropolitan Transportation
Improvement Program (MTIP) to Add Trimet's
Division Transit Project Which was Awarded
\$12,963,076 From the American Rescue Plan Act of
2021 (JL21-13-JUL2)**

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-) RESOLUTION NO. 21-5191
24 METROPOLITAN TRANSPORTATION)
IMPROVEMENT PROGRAM (MTIP) TO ADD) Introduced by: Chief Operating Officer
TRIMET'S DIVISION TRANSIT PROJECT) Andrew Scott in concurrence with
WHICH WAS AWARDED \$12,963,076 FROM) Council President Lynn Peterson
THE AMERICAN RESCUE PLAN ACT OF 2021)
(JL21-13-JUL2))

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, TriMet has been awarded \$12,936,076 from the American Rescue Plan of 2021 for their Division Transit Project; and

WHEREAS, This grant along with the two previous FTA Section 5309 grants will assist TriMet complete the construction phase currently in progress and complete the estimated \$175 million project with a planned completion date in federal fiscal year 2022, and

WHEREAS, the Division Transit project which will provide new 60 foot buses providing services and run every 12 minutes from downtown Portland east through the Division St corridor to Gresham will reduce travel times up to 20 percent; 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 July #2 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 July #2 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 July 9, 2021; and

WHEREAS, JPACT approved Resolution 21-5191 consisting of the July #2 2021 Formal MTIP Amendment on July 15, 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 29, 2021 through Resolution 21-5191 to formally amend the 2021-24 MTIP to include the new TriMet Division Transit Project as funded from the American Rescue Plan Act of 2021.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



Proposed July #2 2021 Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **JL21-13-JUL2**
 Total Number of Projects: 1

Key Number & MTIP ID	Lead Agency	Project Name	Amendment Action	Added Remarks
Project #1 Key NEW TBD MTIP ID NEW TBD New Project	TriMet	Division Transit Project	<u>ADD NEW PROJECT:</u> The formal amendment adds the new FTA grant for the Division Transit Project from the American Rescue Plan Act of 2021.	The grant award is cited on Table 7, Capital Investments, American Rescue Plan of 2021. The \$12 million ARP FTA grant is the latest in support of FTA grants for the Division Transit Project.



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

Formal Amendment
ADD NEW PROJECT
 Add new ARP Act award to the
 Division Transit Project

Lead Agency: TriMet		Project Type: Transit	ODOT Key: NEW - TBD
Project Name: Division Transit Project	1	ODOT Type	MTIP ID: NEW-TBD
		Performance Meas: Transit	Status: 7
Project Status: 7 = Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated.		Capacity Enhancing: Yes	Comp Date: 9/30/2022
		Conformity Exempt: No	RTP ID: 11590
Short Description: High capacity transit on Division from Portland Central Business District to Gresham Town Center.		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 #: JL21-13-JUL2
Detailed Description: Construct and implement 15 mile high capacity transit along the Division corridor utilizing new 60-foot buses running on average every 12 minutes, and includes up to 30 improved or new passenger stations including pedestrian pass-through, pedestrian bypass, shared bicycle and pedestrian, plus island stations from Irving/5th in downtown and then south and east to the Cleveland Ave Park-n-Ride in Gresham.			
STIP Description: TBD			

Last Amendment of Modification: None. Initial MTIP programming. However, the new project reflects the third FTA grant in support of the Division Transit Project which have been programmed individually since 2018.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
Federal Funds								
5309		2021					\$ 12,963,076	\$ 12,963,076
								\$ -
5309 Source American Rescue Plan of 2021, Table 7. Funds are 100% federal							Federal Totals:	\$ 12,963,076
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 12,963,076	\$ 12,963,076
Year Of Expenditure (YOE):								\$ 175,000,000

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 ARP FTA grant for the Division Transit Project for TriMet

Amendment Summary:

The formal amendment adds the new FTA grant for the Division Transit Project from the American Rescue Plan Act of 2021. The grant award is cited on Table 7, Capital Investments, American Rescue Plan of 2021. The \$12 million ARP FTA grant is the latest in support of FTA grants for the Division Transit Project.

RTP References:

- > RTP IDs:
 - ID 10909: HCT: Division Transit Project: Project Development
 - ID 11590: HCT: Division Transit Project: Capital Construction
- > RTP Description: The Division Transit Project will improve travel between Downtown Portland, Southeast and East Portland and Gresham with easier, faster and more reliable bus service.
- > Exemption Status: The project is not exempt and is considered a capacity enhancing project. The requires and completed transportation and air quality modeling analysis as part of the 2018 RTP Update.
- > UPWP amendment: No
- > RTP Goals: Goal 3 - Transportation Choices
- > Goal Objective: Objective 3.3 - Access to Transit
- > Goal Description: Increase household and job access to current and planned frequent transit service.

Fund Codes:

- > 5309 = Federal Transit Administration Section 5309 funds that normally support capital project improvements. In this specific case, the funds originate from the American Rescue Plan of 2021. They are considered 100% federal and no matching funds re required.

Other

- > On NHS: Yes. Division is identified as a MAP-21 NHS Principal Arterial
- > Does the project require transportation modeling: Yes
- > What Metro modeling network applies to the project? - Transit
- > Model category and type: Division St is identified as a "Frequent Bus" arterial line in the Transit modeling network.
- > TCM project: No
- > Located on the CMP: Yes - From I-205 to Hogan in Gresham

Memo



Date: July 9, 2021
To: JPACT and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: July #2 2021 MTIP Formal Amendment & Resolution 21-5191 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD TRIMET’S DIVISION TRANSIT PROJECT WHICH WAS AWARDED \$12,963,076 FROM THE AMERICAN RESCUE PLAN ACT OF 2021 (JL21-13-JUL2)

BACKGROUND

What This Is:

The July #2 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment which is contained in Resolution 21-5191 and being processed under MTIP Amendment JL21-13-JUL2 and applies only to TriMet.

What is the requested action?

TPAC received their notification on July 9, 2021 and now is providing JPACT their approval recommendation of Resolution 21-5191 consisting of TriMet’s new American Rescue Plan Act of 2021 FTA grant award for their Division Transit project.

Proposed July #2 2021 Formal Amendment Bundle					
Amendment Type: Formal/Full					
Amendment #: JL21-13-JUL2					
Total Number of Projects: 1					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key New Project TBD	TBD	TriMet	Division Transit Project	High capacity transit on Division from Portland Central Business District to Gresham Town Center.	ADD NEW PROJECT: The formal amendment adds the new FTA grant for the Division Transit Project from the American Rescue Plan Act of 2021.

Project 1: Division Transit Project New Project	
Lead Agency:	TriMet
ODOT Key Number:	TBD MTIP ID Number: TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Metro SFY 2022 UPWP Project:</u> No • <u>Proposed improvements:</u> The TriMet Division Transit Project will construct and implement a 15 mile high-capacity transit along the Division corridor utilizing new 60-foot buses running on average every 12 minutes, and includes up to 30 improved or new passenger stations from Irving/5th in downtown and then south and east to the Cleveland Ave Park-n-Ride in Gresham. • <u>Source:</u> New project. While this is a new project being added to the MTIP allowing the new American Rescue Plan (ARP) Act of 2021, the grant award is the third ward FTA has provided to their project since 2018. • <u>Amendment Action:</u> Add the new ARP Act grant award using FTA Section 5309 funds to the 2021-24 MTIP. • <u>Funding:</u> This specific FTA grant award originates from the ARP Act of 2021, Table 7 Capital projects. \$12,963,076 and are 100% federal funds with no required match. The two prior awards programmed in the MTIP for the Division Transit Project include the following: <ul style="list-style-type: none"> ○ \$56,005,914 of FTA 5309 funds plus \$37,337,276 of local matching funds for a total of \$93,343,190 ○ 34.688,806 of FTA 5309 funds plus \$23,125,871 of local matching funds for a total of \$57,814,677 ○ The estimated total project cost is \$175 million • <u>FTA Conversion Code:</u> N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Downtown Portland and east to Gresham along the Division St corridor ○ Cross Street Limits: Multiple ○ Overall Mile Post Limits: N/A • <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 project is considered a “capacity enhancing” project from a roadway/motor vehicle improvement perspective and is not exempt


from air quality conformity analysis per 40 CFR 93.126. The project completed its required transportation and air quality modeling analysis as part of the 2018 RTP Update. Associated RTP project IDs are 10909 and 11590.

- **Regional Significance Status:** The project is regionally significant.
- **Amendment ID and Approval Estimates:**
 - STIP Amendment Number: TBD
 - MTIP Amendment Number: JL21-13-JUL2
 - OTC approval required: No.
 - Metro approval date: Tentatively scheduled for July 29th, 2021
 - Other required approvals: ARP Capital Projects Funding Awards, Table 7 provided.

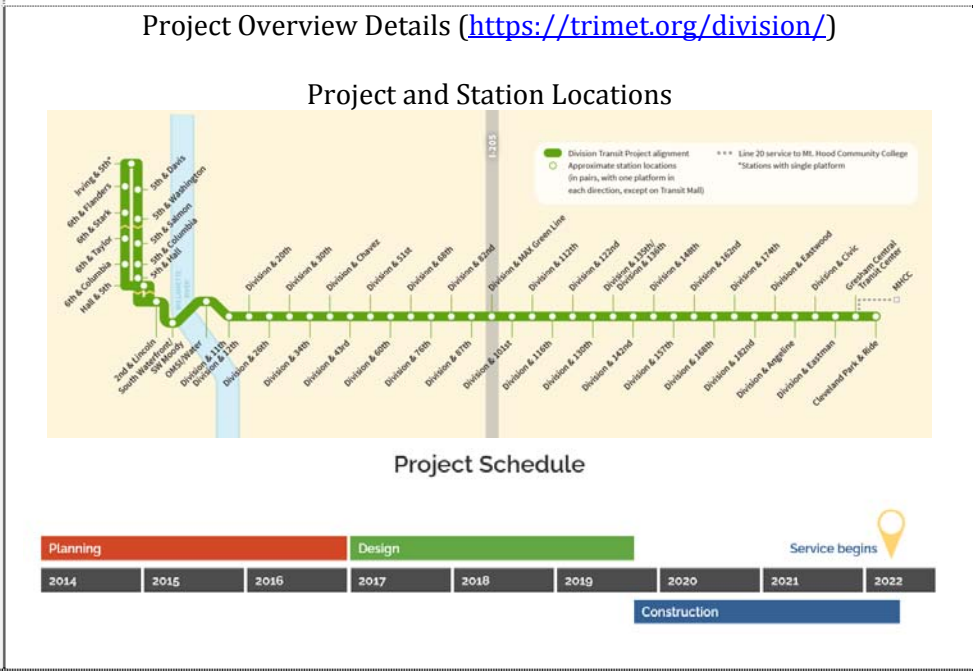
What is changing?

AMENDMENT ACTION: ADD NEW PROJECT:

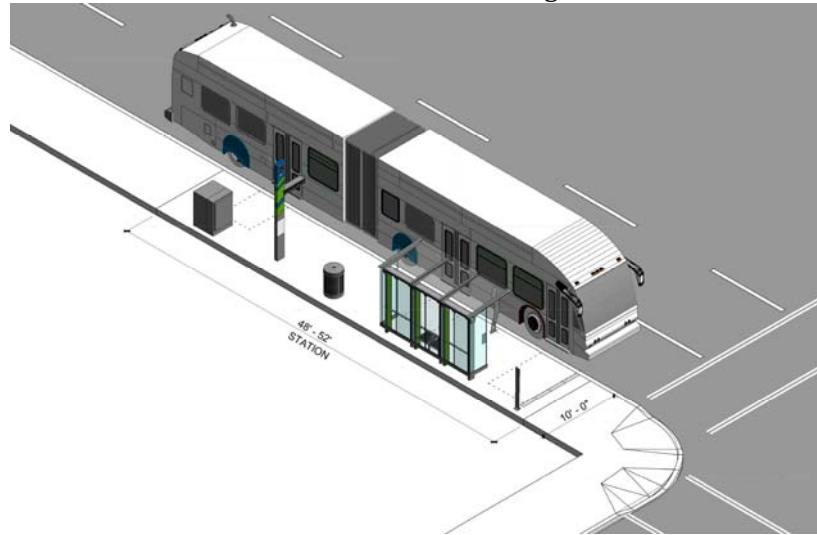
The formal amendment adds the new project consisting of \$12,963,076 of FTA 5309 federal funds to the 2021-24 MTIP. Matching funds are not required. The funding will support the complete of the Division Transit Project which is anticipated to initiate services in Federal Fiscal Year 2022. The project is already under construction which began in 2019.



Additional Details:



Station Types Pedestrian Pass-Through



Shared Pedestrian and Bicycle



Pedestrian Bypass





Planned Operating Buses



Transit Benefits

The TriMet Division Transit Project is a 15 mile transit improvement project that will reduce travel times up to 20 percent, with buses running every 12 minutes and more often during peak hours. Additional benefits include:

- Longer buses with room for 60 percent more riders
- Multiple-door boarding for briefer stops
- Expanded bus stations with amenities such as weather protection
- Stations located where rider demand is greatest — minimizing travel times while providing important transit connections
- Transit signal priority — traffic signals prioritize bus travel, getting riders to their destinations faster

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a full/formal amendment.
Total Programmed Amount:	The ARP Act of 2021 provided \$12,963,076 of FTA Section 5309 funds and is the latest federal grant to the project that has an estimated total project cost of \$175. million
Added Notes:	N/A

Funding Verification

FEDERAL TRANSIT ADMINISTRATION			
Table 7			
AMERICAN RESCUE PLAN ACT OF 2021 -- CAPITAL INVESTMENTS-- PROGRAM ALLOCATIONS			
Last Updated June 11, 2021			
State	Discretionary ID	Project Location and Description	Allocation
AZ	D2021-RPNS-001	Phoenix, South Central Light Rail Extension/Downtown Hub	\$81,294,942
AZ	D2021-RPSS-001	Tempe, Tempe Streetcar	17,406,412
CA	D2021-RPCC-001	San Carlos, Peninsula Corridor Electrification Project	52,415,186
CA	D2021-RPCC-002	San Francisco, Transbay Corridor	87,075,134
CA	D2021-RPNS-002	Los Angeles, Regional Connector	59,228,415
CA	D2021-RPNS-003	Los Angeles, Westside Subway Section 1	66,428,844
CA	D2021-RPNS-004	Los Angeles, Westside Subway Section 2	58,417,784
CA	D2021-RPNS-005	Los Angeles, Westside Subway Section 3	93,437,754
CA	D2021-RPNS-006	San Diego, Mid-Coast Corridor Transit Project	57,098,330
CA	D2021-RPNS-007	San Francisco - Third Street Light Rail-Central Subway Project	23,121,562
CA	D2021-RPNS-008	Santa Ana and Garden Grove Streetcar	9,407,272
CA	D2021-RPSS-002	San Francisco, Van Ness BRT	21,889,182
CA	D2021-RPSS-003	San Bernardino, West Valley Connector BRT	26,088,771
FL	D2021-RPSS-004	Jacksonville, Southwest Corridor BRT	2,430,716
FL	D2021-RPSS-005	Miami-Dade, South Corridor Rapid Transit Project	29,531,546
FL	D2021-RPSS-006	St. Petersburg, Central Avenue BRT	3,276,537
HI	D2021-RPNS-009	Honolulu - High Capacity Transit Corridor	70,000,000
IL	D2021-RPCC-003	Chicago, Red and Purple Modernization Phase 1	30,650,898
IN	D2021-RPNS-010	Gary, Double Track Northwest Indiana	24,585,403
IN	D2021-RPNS-011	Lake County, West Lake Corridor	43,971,185
IN	D2021-RPSS-007	Indianapolis, IndyGo Purple Rapid Transit Line	12,008,210
MA	D2021-RPNS-012	Boston, Green Line Extension	103,554,165
MD	D2021-RPNS-013	Maryland National Capital Purple Line	106,163,372
MN	D2021-RPNS-014	Minneapolis, Southwest Light Rail Transit	30,552,442
MN	D2021-RPSS-008	Minneapolis, Orange Line BRT	11,362,644
MO	D2021-RPNS-015	Kansas City, Streetcar Main Street Extension	24,673,482
NC	D2021-RPSS-009	Charlotte, LYNX Streetcar Phase 2	11,122,146
NC	D2021-RPSS-010	Raleigh, Wake Bus Rapid Transit New Bern Avenue Project	5,404,048
NJ	D2021-RPCC-004	Hudson County, Portal North Bridge Project	77,821,390
NY	D2021-RPNS-016	New York - East Side Access	70,000,000
NY	D2021-RPSS-011	Albany, Washington/Western BRT	2,490,772
OR	D2021-RPSS-012	Portland, Division Transit BRT	12,963,076
OR	D2021-RPSS-013	Portland, MAX Red Line Extension and Reliability Improvements	15,721,739
PA	D2021-RPSS-014	Pittsburgh, Downtown-Uptown-Oakland-East End BRT	19,285,801
TX	D2021-RPCC-005	Dallas, DART Red and Blue Line Platform Extensions	2,471,166
TX	D2021-RPSS-015	El Paso, Montana BRT	3,111,053
UT	D2021-RPSS-016	Ogden, Ogden/Weber State University Bus Rapid Transit	6,254,183
WA	D2021-RPNS-017	Seattle, Lynnwood Link Extension	94,047,724
WA	D2021-RPNS-018	Seattle, WA Federal Way Light Rail Project	158,583,550
WA	D2021-RPSS-017	Spokane, Central City BRT	5,754,747
WA	D2021-RPSS-018	Tacoma, Tacoma Link Extension	20,704,007
WA	D2021-RPSS-019	Everett, Swift Orange	6,498,606
WA	D2021-RPSS-020	Seattle, Madison BRT	10,897,354
WA	D2021-RPSS-021	Vancouver, Mill Plain BRT	3,704,781
WI	D2021-RPSS-022	Milwaukee, East-West BRT	2,093,669
GRAND TOTAL			\$1,675,000,000

Note: The Amendment Matrix located below 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.

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.

- 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:
 - 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 July #2 2021 Formal MTIP amendment (JL21-13-JUL2) will include the following:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	June 28, 2021
• TPAC notification and approval recommendation.....	July 9, 2021
• JPACT approval and recommendation to Council.....	July 15, 2021
• Completion of public notification process.....	July 27, 2021
• Metro Council approval.....	July 29, 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.....	August 5, 2021
• Submission of the final amendment package to USDOT.....	August 5, 2021
• ODOT clarification and approval.....	Mid to late August 2021
• USDOT clarification and final amendment approval.....	Mid to late 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:

TPAC received their notification on July 9, 2021 and now is providing JPACT their approval recommendation of Resolution 21-5191 consisting of TriMet's new American Rescue Plan Act of 2021 FTA grant award for their Division Transit project.

No Attachments

**4.3 Resolution No. 21-5192, For the Purpose of
Amending the 2021-24 Metropolitan Transportation
Improvement Program (MTIP) to Add ODOT'S
Interstate 205- Abernethy Bridge Improvement
Segment Which Includes \$375 Million of Construction
Phase Funding (JL21-14-JUL3)**

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD ODOT'S INTERSTATE 205 – ABERNETHY BRIDGE IMPROVEMENT SEGEMENT WHICH INCLUDES \$375 MILLION OF CONSTRUCTION PHASE FUNDING (JL21-14-JUL3))	RESOLUTION NO. 21-5192
)	Introduced by: Chief Operating Officer
)	Andrew Scott in concurrence with
)	Council President Lynn Peterson

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 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 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, the seven mile stretch of Interstate 205 between I-5 and OR213 contains only two through-lanes in each direction supports over 100,000 vehicles, is subject to daily 6.75 hours of significant congestion, experiences a large volume of crashes in the corridor, and is impacted by approximately \$10.9 million per year from injuries, property damage, freight delays and fuel costs related to crashes, and

WHEREAS, ODOT has proposed to add a third lane for capacity support through the corridor along with several additional major facility improvements; and

WHEREAS, project development began in 2016 with Preliminary Engineering starting in 2018 and Right-of-Way in 2019, and has completed the Active Traffic Management (ATM) improvement portion to the overall larger project; and

WHEREAS, ODOT has completed a significant amount of public outreach to obtain public input about the project since 2017 which includes 28 community briefings with neighborhood groups in Oregon City, West Linn, and Clackamas County, three on-line open houses, two in-person open houses, and four informational project newsletters to residents within ½-mile of the project area; and

WHEREAS, the passage of HB3055 provides a new funding mechanism for the I-205 project and the Oregon Transportation Commission on July 15, 2021 will is scheduled to approve \$375 million of

additional funding to support the construction phase for the I-205 Improvements 1A - OR43 to OR213 segment, also referred to as the I-205 Abernethy Bridge improvement project; and

WHEREAS, the I-205 Improvements 1A - OR43 to OR213 project will complete several capacity and facility improvements which include constructing ground improvements, new foundations, sub-structure and superstructure, adding a lane in both directions of I-205, reconstruction of the OR 43 Interchange and include a roundabout, reconstruction of the OR 99 interchange to accommodate the bridge widening, plus include sound walls in the vicinity of SB I-205 at Exit 9, stormwater mitigation, landscaping, paving, striping, signing and lighting improvements; and

WHEREAS, a review of the proposed project 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 there are no significant inconsistencies between the project as described in the RTP and the project proposed in the July #3 2021 MTIP Formal Amendment; and

WHEREAS, RTP consistency check areas included financial/fiscal constraint verification from OTC's approval action at their July 2021 meeting, eligibility and proper use of committed funds, an assessment of possible air quality impacts, a deviation assessment from approved regional RTP goals and strategies, and a reconfirmation that the MTIP's financial constraint finding is maintained a result of the July #3 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 July 9, 2021; and

WHEREAS, JPACT approved Resolution 21-5192 consisting of the July #3 2021 Formal MTIP Amendment on July 15, 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 29, 2021 through Resolution 21-5192 to formally amend the 2021-24 MTIP to include the new ODOT I-205 Improvements 1A - OR43 to OR213 improvement project.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



Proposed July #3 2021 Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **JL21-14-JUL3**
 Total Number of Projects: 1

Key Number & MTIP ID	Lead Agency	Project Name	Amendment Action	Added Remarks
Project #1 Key 22467 MTIP ID NEW TBD New Project	ODOT	I-205 Improvements 1A - OR43 to OR213	<u>ADD NEW PROJECT:</u> The formal amendment adds the I-205 Abernethy Bridge improvement project to the 2021-24 MTIP.	The project is part of the larger I-205 improvement project that will add a third through-lane from I-5 to OR213 and includes Active Traffic Management System (ATMS) improvements



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

Formal Amendment
ADD NEW PROJECT
Add new I-205 Abernethy Bridge
improvement project

Lead Agency: ODOT		Project Type: Capital	ODOT Key: 22467
Project Name: I-205 Improvements 1A - OR43 to OR213	1	ODOT Type: Modern	MTIP ID: NEW-TBD
		Performance Meas: Yes	Status: 6
		Capacity Enhancing: Yes	Comp Date: 9/30/2027
		Conformity Exempt: No	RTP ID: 11969
		On State Hwy Sys: I-205	RFFA ID: N/A
		Mile Post Begin: 8.50	RFFA Cycle: N/A
		Mile Post End: 11.05	UPWP: No
		Length: 2.55	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 #: 21-24-0942	MTIP Amnd #: JL21-14-JUL3
		<p>Detailed Description: On I-205 from MP 8.50 to 11.05, complete the Abernethy Bridge improvement segment which includes constructing ground improvements, new foundations, sub-structure and superstructure and adding a lane in both directions of I-205. The I-205 NB and OR 43 IC will be reconstructed and include a roundabout. The OR 99 IC will be reconstructed to accommodate the bridge widening. Additional scope elements include a sound walls in the vicinity of SB I-205 at Exit 9, stormwater mitigation, landscaping, paving, striping, signing and lighting improvements.</p>	
<p>STIP Description: This segment of the project will seismically retrofit and widen the Abernethy Bridge by constructing ground improvements, new foundations, sub-structure and superstructure and adding a lane in both directions of I-205. The interchange at I-205 NB and OR 43 will be reconstructed and include a roundabout. The interchange at OR 99 will be reconstructed to accommodate the bridge widening. The project includes a noise wall in the vicinity of SB I-205 at Exit 9. Stormwater, landscaping, paving, striping, signing and lighting are also included as part of this project.</p>			

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other	Total
Federal Funds								
ADVCON	ACPO	2021				\$ 375,000,000		\$ 375,000,000
								\$ -
ADVCON is identified as 100% federal at this time							Federal Totals:	\$ 375,000,000
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ 375,000,000	\$ -	\$ 375,000,000
Year of Expenditure (YOE):								\$ 375,000,000

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 I-205 Abernethy Bridge improvement segment (1 of 3 total improvement segments) to the 2021-24 MTIP. Parent project is Key 19786
- > OTC approval required: Yes. Funding approval during their July 15, 2021 meeting.

Amendment Summary:

The formal amendment add the Abernethy Bridge improvement segment to the overall multi-segment I-205 improvement project which includes Active Traffic Management System (ATMS) Intelligent Transportation System Improvement, Abernethy Bridge widening from OR43 to OR 213, and add a third through-lane in both directions for OR213 to I-5.

- > Will Performance Measurements Apply: Yes - Multiple areas

RTP References:

- > RTP ID: 11969 - I-205 Abernethy Bridge (CON)
- > RTP Description: Widen both directions of the I-205 Abernethy Bridge and approaches to address recurring bottlenecks on the bridge. Install Active Traffic Management (ATM) on northbound and southbound I-205. Preliminary Engineering (PE) and Right-of-Way (ROW) phase.
- > Fiscal verification: OTC action - July 15, 2021 meeting
- > Exemption Status: Project is not exempt. The project is considered a capacity enhancing type project per 40 CFR 93.126 which requires air quality and transportation demand modeling analysis. The completed this as part of the 2018 RTP Update and is identified in the constrained section under project IDs 11969 and 11904
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: Objective 5.3 Preparedness and Resiliency
- > Goal Description: Reduce the vulnerability of regional transportation infrastructure to natural disasters, climate change and hazardous incidents.

Fund Codes:

- > ADVCON = Federal Advance Construction fund type code placeholder. Used when the expected federal fund type code is not initially available for the project . ODOT agrees to cover the project costs allowing the phase to continue. At a later date when the federal fund code is know, a fund type code conversion will occur replacing ADVCON with he specific federal fund code

Other

- > On NHS: Yes. I-205 is identified as part of the Eisenhower Interstate System
- > Does the project require modeling? Yes. See exemption status comments.
- > Is the project located in the Metro modeling network? Yes.
- > Metro Model: Motor Vehicle network
- > Model category and type: Throughway
- > TCM project: No
- > Located on the CMP: Yes

I-205 IMPROVEMENTS

Stafford Road to OR 213



JUNE 2021

WWW.I205CORRIDOR.ORG

PHASE 1A: OR 43 TO OR 213

DETAILS FOR CONTRACTORS

The I-205 Improvements Project will improve our economy by providing Oregonians safer, more reliable access to work and critical services, even after an earthquake or other major disaster. We are constructing the project in phases, with the first phase between OR 43 and OR 213 kicking off in 2022.



IMPROVEMENTS INCLUDED IN PHASE 1A

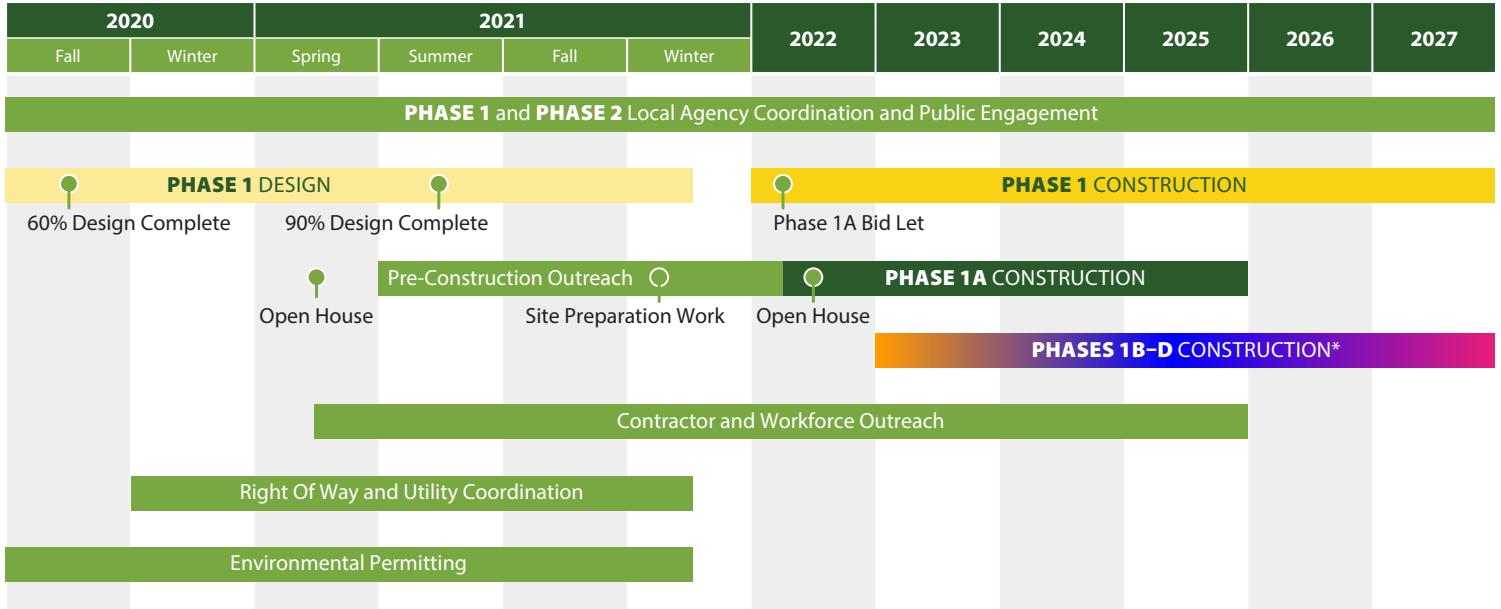
- | | |
|--|---|
| <ul style="list-style-type: none"> 1 Construct final configuration of Willamette Falls Drive/OR 43 intersection. 3 End roadwork at West A Bridge. <i>Bridge work in Phase 1C.</i> 5 Remove third southbound lane south of Abernethy Bridge. 7 Construct final configuration of OR 43 southbound intersection. 9 Carry three-lane configuration southbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge. 11 Construct Main Street wall. 13 Begin roadwork at Main Street Bridge. <i>Bridge work in Phase 1B.</i> 15 Re-stripe southbound lanes from two lanes plus an auxiliary lane to three lanes between OR 213 entrance and OR 99E exit. Install rumble strips. | <ul style="list-style-type: none"> 2 Construct final configuration of Willamette Falls Drive/Broadway intersection. 4 Temporary mainline widening and temporary ramp alignment. 6 Construct final configuration of OR 43 roundabout, northbound entrance and southbound exit ramp. 8 Maintain existing two-lane configuration northbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge. 10 Construct final configuration of OR 99E southbound and northbound ramp intersection, OR 99E entrance ramp and Clackamette Drive walls. 12 Construct half of the configuration of northbound entrance ramp. <i>Final configuration dependent on Main Street Bridge work in Phase 1B.</i> 14 Construct sound wall. <i>There is no southbound roadway widening in Phase 1A.</i> 16 Sign bridge for new southbound traffic configuration. |
|--|---|

I-205 IMPROVEMENTS

Stafford Road to OR 213



SCHEDULE



*Scheduling of Phases 1B, 1C and 1D is currently tentative and will be refined fall 2021.

FOR MORE INFORMATION

Workforce and Business Opportunities: www.I205Corridor.org

For other DBE information, visit:

www.oregon.gov/ODOT/Business/OCR/Pages/Disadvantaged-Business-Enterprise.aspx

Interested contractors can contact Allen Hendy, ODOT Project Manager, with questions or for more information:

Allen.HENDY@odot.state.or.us | 971-235-3861

For ADA (Americans with Disabilities Act) or Civil Rights Title VI accommodations, translation/interpretation services, or more information call 503-731-4128, TTY 800-735-2900 or Oregon Relay Service 7-1-1.

Si desea obtener información sobre este proyecto traducida al español, sírvase llamar al 503-731-4128.

Если вы хотите, чтобы информация об этом проекте была переведена на русский язык, пожалуйста, звоните по телефону 503-731-4128.

如果您想瞭解這個項目翻譯成 繁體中文 的相關資訊, 請致電 (503) 731-4128.

如果您想了解这个项目翻译成 简体中文 的相关信息, 请致电 503-731-4128.

이 프로젝트에 관한 한국어로 된 자료 신청방법 전화: 503-731-4128.

Nếu quý vị muốn thông tin về dự án này được dịch sang tiếng Việt, xin gọi 503-731-4128.

DATE: June XX, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda/Consent XX – Amend 2021-2024 Statewide Transportation Improvement Program (STIP) to increase funding and add a construction phase to the I-205 Improvements project.

Requested Action:

Amend the 2021 – 2024 Statewide Transportation Improvement Program (STIP) to increase funding for Preliminary Engineering (PE) funds for the I-205 Improvements project from \$32.2 million to \$50.7 million. The PE funds will increase by \$18.5 million and will be funded by the financial tools provided in House Bill 3055.

Establish the Construction (CN) funding for Phase 1A of the project. Amend the 2021 – 2024 STIP to program \$375 million in Construction funding for Phase 1A. The CN funds will be funded by the financial tools provided in House Bill 3055.

STIP Amendment Funding Summary:

Project	Current Funding	Proposed Funding
I-205: I-5 - OR213, Preliminary Engineering (PE)	\$32,200,000	\$50,700,000
I-205: I-5 - OR213, Phase 1A Construction (HB 3055)	\$0	\$375,000,000
TOTAL	\$32,200,000	\$425,700,000

Project to increase funding:

I-205: I-5 - OR213 (KN 19786)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	2016	\$12,452,305	\$12,452,305
Preliminary Engineering	2018	\$32,200,000	\$50,700,000
Right of Way	2019	\$2,460,000	\$2,460,000
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
TOTAL		\$47,112,305	\$65,612,305

Project to add:

I-205: I-5 - OR213, Phase 1A Construction (KN TBD)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	N/A	\$0	\$0
Preliminary Engineering	N/A	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	2022	\$0	\$375,000,000
TOTAL		\$0	\$375,000,000

Background:

Project Overview

The I-205 Improvements Project improves the congested seven-mile section of Interstate 205 between OR213 and Stafford Rd. by widening and seismically retrofitting the Abernethy Bridge, adding the missing third general purpose lane (northbound and southbound), and creating safer options to enter and exit the corridor with an auxiliary lane from OR43 to OR213, and combining the OR 43 ramps. Once the project is complete, congestion will be reduced from 6.75 hours a day to 2, the Abernethy Bridge will be the first earthquake-ready state crossing of the Willamette River and eight other bridges will be rebuilt or seismically retrofitted.

The National Environmental Policy Act (NEPA) process was completed in December 2018 with a Documented Categorical Exclusion. As preliminary design progressed, three phases of construction were planned. Phase 1 constructs OR213 to 10th St. and reached 90% design in May 2021, Phase 2 completes 10th St. to Stafford Rd. and is currently at 60% design. Phase 3 was successfully completed on time and budget with the installation of Real Time traffic management signs in late 2020.

Multiple construction contracts will be let to deliver Phase 1, starting with Phase 1A. This phase will go to bid in December 2021, with construction beginning during the allowable in-water work window in summer 2022. Phase 1A includes Abernethy Bridge widening and seismic strengthening, highway construction, OR43 roundabout construction and ramp improvements, OR 99E interchange improvements, stormwater treatment, retaining walls, signing, striping, sign structures, illumination, and construction of a sound wall at Exit 9. Construction of Phase 1A is expected to end in 2026, after 4 in-water work cycles.

Phase 1A will be delivered with an alternative procurement method that scores technical qualifications, approach and cost. The Price-Plus-Multi-Parameter procurement is being used due to the highly complex and technical requirements associated with widening the Abernethy Bridge. In Price-Plus-Multi-Parameter, price is weighted at 40 percent and the technical approach and qualifications make up

the remaining 60 percent. Technical experience will be sought to match the complexities associated with the project including bridge construction/widening; drilled shafts; marine access; temporary traffic control and traffic maintenance; and permit compliance. ODOT is working with FHWA to supplement the Diversity Program goals that will be included in the contract for Disadvantaged Business Enterprises (DBEs), on the job training and Tribal Employment Rights Ordinance (TERO) program.

The addition of \$18.5 million would cover the remaining preliminary engineering costs for Phase 1 and Phase 2. Detailed planning will happen in summer/fall 2021 to determine construction sequencing, contract specifications, traffic management plans and cost estimates, and risk management tools for the Phase 1 contract bundles. This funding will support ongoing project development to fully develop the bid packages for the remaining portions of Phase 1 with the plan to complete construction in 2026.

Financial Plan

The Oregon State Legislature has identified toll revenue as the primary source of funding for this project and directed ODOT to develop a toll program for the I-5 and I-205 corridors. The process to implement a toll program is lengthy and it will take several years before any revenues are available to finance the project. Tolling is currently being evaluated under the National Environmental Policy Act (NEPA) process. The earliest tolling could be implemented is 2024 and toll revenue will not be available until that time.

The I-205 project will be constructed in phases; Phase 1A of the I-205 OR213 to Stafford Road project would seismically retrofit and expand the Abernethy Bridge over the Willamette River. Construction of Phase 1A of the project is expected to begin in FFY 2022, and is estimated to cost an additional \$372 million beyond what is already programmed in the STIP. Consequently a source of construction financing is needed to begin construction prior to a tolling decision. In the 2021 Legislative Session, legislation provides this financing through a combination of bonding and short-term borrowing. The legislation, HB 3055, will increase ODOT's short-term borrowing cap to \$600 million and allow for five year maturities. The bill will also allow the \$30 million authorized in HB 2017 (2017 Session), which begins in January 2022 and is currently set aside for the I-5 Rose Quarter project, to be shared between the Rose Quarter and the I-205 OR213 to Stafford Road and Toll Program development projects. Both of these changes provide a means to interim fund Phase 1A of the I-205 OR213 to Stafford Road project before toll revenue becomes available.

Attachments:

- Attachment 1 – PowerPoint
- Maps – Location and Vicinity

Memo

Date: July 9, 2021
 To: JPACT and Interested Parties
 From: Ken Lobeck, Funding Programs Lead
 Subject: July #3 2021 MTIP Formal Amendment & Resolution 21-5192 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD ODOT’S INTERSTATE 205 – ABERNETHY BRIDGE IMPROVEMENT SEGEMENT WHICH INCLUDES \$375 MILLION OF CONSTRUCTION PHASE FUNDING (JL21-14-JUL3)

BACKGROUND


What This Is:

The July #3 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment which is contained in Resolution 21-5192, (I-205 Abernethy Bridge improvement segment) and being processed under MTIP Amendment JL21-14-JUL3 and applies only to ODOT.

What is the requested action?

TPAC received their official notification on July 9, 2021 and now is providing JPACT with their approval recommendation of Resolution 21-5192 consisting of adding ODOT’s I-205 Abernethy Bridge improvement project, officially titled as the “I-205 Improvements 1A - OR43 to OR213” project with \$375 million of construction funding.

Proposed July #3 2021 Formal Amendment Bundle					
Amendment Type: Formal/Full					
Amendment #: JL21-14-JUL3					
Total Number of Projects: 1					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 22467 New Project	TBD	ODOT	I-205 Improvements 1A - OR43 to OR213	Abernethy Bridge improvement segment to include bridge reconstruction/widening, lane widening, roundabout at I-205/OR43 IC construction, OR99 IC reconstruction, sound walls, stormwater improvements, and various paving, signage, and landscaping	<u>ADD NEW PROJECT:</u> The formal amendment adds ODOT’s new I-205 Improvements 1A – OR43 to OR213, (also referred to as the Abernethy Bridge improvement segment) to the 2021-2024 MTIP.

<p>Project 1:</p>	<p>I-205 Improvements 1A - OR43 to OR213 (New Project)</p>		
<p>Lead Agency:</p>	<p>ODOT</p>		
<p>ODOT Key Number:</p>	<p>22467</p>	<p>MTIP ID Number:</p>	<p>TBD</p>
<p>Project Description and Overview:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> <p>General: ODOT's I-205 Improvements 1A - OR43 to OR213 project is one of several improvement packages/segments within the larger I-205 improvement project, "I-205: I-5 to OR213, Phase 1".</p> <p>The project was originally programmed in Key 19786. (Key 19786 also is commonly referred to as the I-205 3rd Lane project). Key 22467 represents a "child" project to the parent in Key 19786. Additional details are provided explaining this in the "What is Changing" section after the Amendment Action statement.</p> <p><u>Metro SFY 2022 UPWP Project:</u> No</p> <p><u>Proposed improvements:</u> The I-205: I-5 to OR213, Phase 1 project will provide multiple and significant improvements to I-205 and to the Abernethy Bridge. Major scope elements include the following:</p> <p>PHASE 1A: OR 43 TO OR 213</p> <p>DETAILS FOR CONTRACTORS</p> <p>The I-205 Improvements Project will improve our economy by providing Oregonians safer, more reliable access to work and critical services, even after an earthquake or other major disaster. We are constructing the project in phases, with the first phase between OR 43 and OR 213 kicking off in 2022.</p>  <p>The map shows 16 numbered construction sites along the I-205 corridor. Sites 1-7 are located west of the Willamette River, and sites 8-16 are east of the river. Key landmarks include West Linn, Oregon City, and the Abernethy Bridge. Major roads shown include OR 43, OR 99E, and Washington St.</p> <ol style="list-style-type: none"> Construct final configuration of Willamette Falls Drive/OR 43 intersection. Construct final configuration of Willamette Falls Drive/Broadway intersection. End roadwork at West A Bridge. <i>Bridge work in Phase 1C.</i> Complete temporary mainline widening and temporary ramp alignment. Remove third southbound lane south of Abernethy Bridge. 		

6. Construct final configuration of OR 43 roundabout, northbound entrance and southbound exit ramp.
7. Construct final configuration of OR 43 southbound intersection.
8. Maintain existing two-lane configuration northbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge
9. Carry three-lane configuration southbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge.
10. Construct final configuration of OR 99E southbound and northbound ramp intersection, OR 99E entrance ramp and Clackamette Drive walls.
11. Construct Main Street wall.
12. Construct half of the configuration of northbound entrance ramp.
Final configuration dependent on Main Street Bridge work in Phase 1B.
13. Begin roadwork at Main Street Bridge (*Bridge work in Phase 1B*).
14. Construct sound wall.
15. Re-stripe southbound lanes from two lanes plus an auxiliary lane to three lanes between OR 213 entrance and OR 99E exit. Install rumble strips.
16. Sign bridge for new southbound traffic configuration.

- **Source:** New project.
Key 22467 is a child project (construction phase) to the parent in Key 19786 (PE and ROW phases). Key 22467 is considered a new project to the MTIP.
- **Amendment Action:** Add
Under Key 22467, the construction phase is being added in federal fiscal year 2021 to the 2021-24 MTIP
- **Funding:**
When all segments/phase/packages that are part of the complete I-205: I-5 to OR213, phase 1 improvement project, the estimated total project cost is estimated at \$500 million. The construction phase for Key 22467, I-205 Improvements 1A - OR43 to OR213 (Abernethy Bridge and area improvements) totals \$375 million. Funding for the construction phase originates from Oregon HB3055. The legislation was passed on 6/26/2021.

The very short description for HB3055 is “Modifies, adds and repeals laws relating to transportation. The bill summary is as follows: “Modifies, adds and repeals laws relating to transportation. Modifies, adds and repeals laws relating to transportation. Exempts from license tax first sale, use or distribution of motor vehicle fuel in this state purchased by Indian tribe, tribal entity or tribal member entity for delivery to service station owned by Indian tribe, tribal entity or tribal member entity and operated on tribe's reservation or trust land. Requires Indian tribe to impose tax at same rate as license tax on sales of purchased motor vehicle fuel and to use revenues solely for uses consistent with constitutional requirements applicable to revenues from sales of motor vehicle fuel. Takes effect on 91st day following adjournment sine die.”

81st OREGON LEGISLATIVE ASSEMBLY--2021 Regular Session

House Bill 3055

Sponsored by JOINT COMMITTEE ON TRANSPORTATION (at the request of Representative Susan McLain, Senator Lee Beyer)

HB3055 makes housekeeping changes to the statutes governing the Oregon Department of Transportation (ODOT) operations. In addition to the housekeeping changes, the measure changes the following:

- Changes tolling statutes to include language around managing demand and improving operations as part of the rationale for assessing tolls;
- Allows the dedicated \$30 million in State Highway Fund annual revenue for the I-5 Rose Quarter Project to also be used to pay for:
 - **The I-205 Improvements: Stafford Road to Oregon Route 213 Project;**
 - The I-5 Boone Bridge and Seismic Improvement Project
 - The implementation of the toll program established under ORS 383.150.
- **Increases ODOT’s short-term borrowing authority from \$100 million to \$600 million and extends maximum maturity of short-term obligations from 3 to 5 years;**
- Renames the State Tollway Account the Toll Program Fund and establishes the fund as separate and distinct from the State Highway Fund; and
- Authorizes the State Treasurer, at the request of ODOT, to issue tollway project revenue bonds for the purpose of financing tollway projects.

Added note: The funding commitment requires approval from the Oregon Transportation Commission (OTC). The OTC will consider the funding commitment during their July 15, 2021 meeting. The formal MTIP amendment is progressing concurrently with ODOT required approval stapes. However, the MTIP amendment’s approval is contingent upon OTC’s July 15, 2021 approval vote.

	<ul style="list-style-type: none"> • <u>FTA Conversion Code:</u> N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: On I-205 in and around the Abernethy Bridge across the Willamette River in West Linn and Oregon City ○ Cross Street Limits: Multiple ○ Overall Mile Post Limits: MP 8.50 to 11.05 • <u>Current Status Code:</u> 6 = Pre-construction activities (pre-bid, construction management oversight, etc.). • <u>Air Conformity/Capacity Status:</u> The project is considered a “capacity enhancing” project from a roadway/motor vehicle improvement perspective and is not exempt from air quality conformity analysis per 40 CFR 93.126. The project completed its required transportation and air quality modeling analysis as part of the 2018 RTP Update. The RTP project ID is 11969. • <u>Regional Significance Status:</u> The project is regionally significant. The project is located on the Metro Motor Vehicle modeling network, contains federal funds, and includes capacity enhancing scope of work elements. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0942 ○ MTIP Amendment Number: JL21-14-JUL3 ○ OTC approval required: Yes. OTC approval of the \$375 million funding commitment to Key 22467 scheduled to occur on July 15, 2021. The MTIP amendment is progressing concurrently with required OTC actions and is contingent upon OTC approval. ○ Metro approval date: Tentatively scheduled for July 29th, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT:</u></p> <p>The formal amendment adds the new project consisting with \$375 million of funding committed to the construction phase. Approval of the MTIP amendment is contingent upon OTC approval for the funding which is scheduled to occur during their July 15, 2021 meeting.</p> <p><u>Programming Background Summary</u></p> <p>Approximately 100,000 vehicles travel through the project area, which consists of the seven-mile stretch of I-205 between OR 213 and Stafford Road. It is the only section of I-205 with two travel lanes in each direction, creating a bottleneck that impacts the flow of traffic and freight throughout the region. The project area experiences the following issues:</p> <ul style="list-style-type: none"> • 6.75 hours of congestion per day, on average • A large volume of crashes – between 2014 and 2018, there were 896 crashes in the corridor

- Approximately \$10.9 million per year from injuries, property damage, freight delays and fuel costs related to crashes

In addition to adding a third travel lane in each direction, the project will upgrade the Abernethy Bridge to make it seismically resilient. The Portland Metro Area is susceptible to significant infrastructure damage in the event of a large natural disaster and currently does not have a north-south lifeline route. Upgrading the Abernethy Bridge, and eight other bridges in the corridor, to be seismically resilient will provide this north-south lifeline route so that people and goods can safely travel through the region in the event of a disaster. This flow of people and goods will have regional impacts for the rest of the state and Washington.

A mentioned earlier, Key 22467 (reflecting the construction phase for the I-205 Improvements 1A - OR43 to OR213 project), is a child project to the parent I-205: I-5 to OR213 improvement project in Key 19786. Delivery of the overall construction phase for the I-205 improvement project is divided into multiple segments. As the funding for the construction phase for these segments is obtained and committed, the segment is split-off as a child project and programmed accordingly.

Per the ODOT OTC Staff Report from April 6, 2018, the I-205 improvement is described as follows:

The purpose of the project is to reduce congestion on the Interstate 205 corridor between Stafford Road and Oregon 99 East in Clackamas County. The project scope includes four main components:

- Widen and seismically retrofit the George Abernethy Bridge near Oregon City.
- Retrofit or replace the other seismically vulnerable bridges carrying Interstate 205 in the project corridor.
- Widen the freeway to three northbound and three southbound lanes between Stafford Road and Oregon 99 East.
- Modify interchanges at Oregon 43 and Oregon 99 East to conform to the additional freeway lanes and add Active Traffic Management (ATM) elements consistent with the Oregon Department of Transportation (ODOT) Region 1's ATM Project Atlas.

The I-205 Improvements 1A - OR43 to OR213 in Key 22467 addresses the required improvements that are part of the Abernethy Bridge segment. An overview of the full project is shown below.



MTIP and STIP programming began with Key 19786 in 2016 project development and then Preliminary Engineering (PE) activities were added in 2018 to the MTIP. The Right-of-Way (ROW) phase was added to the TIP and STIP in 2019 as shown below. A total of \$47,500,000 was programmed supporting project Development (Planning), PE, and ROW.

[home](#)
[admin](#)
[RTP](#)
[RFFA](#)
[MTIP](#)
[FUND](#)

[details](#)
[costs](#)
[programming](#)
[map](#)
[amendments](#)
[obligations](#)
[earmarks](#)
[comments](#)

ODOT Key: 19786 | MTIP ID: 70859
 I-205: I-5 TO OR213, Phase 1 - Cycle 2018-21

Project(s) in this cycle are not editable

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2016		\$11,527,500	\$972,500	\$2,500,000	\$15,000,000	<input type="checkbox"/>
	2016	NHFP (Z460) 92.22%	\$11,527,500	\$972,500	\$0	\$12,500,000	
	2018	OTHER - LOCAL			\$2,500,000	\$2,500,000	
Preliminary engineering	2018		\$15,769,620	\$1,330,380	\$12,900,000	\$30,000,000	<input type="checkbox"/>
	2016	ACPO (92.22%)	\$15,769,620	\$1,330,380		\$17,100,000	
	2018	HB2001 (B4A0)			\$0	\$12,900,000	
Purchase right of way	2019			\$0	\$2,500,000	\$2,500,000	<input type="checkbox"/>
	2018	HB2001 (B4A0)			\$0	\$2,500,000	
Totals >>			\$27,297,120	\$2,302,880	\$17,900,000	\$47,500,000	

The first project components/segment ready to move forward into construction with committed funding was the Active Traffic Management improvement portion. The major scope elements for this segment were to install active traffic management (ATM) improvements throughout the project limits to help travelers get where they are going safely and efficiently. These signs can display traffic flow information, roadway conditions, and advisory speed limits. This child project was split-off the parent in Key 19786 and programmed in the MTIP and STIP in 2019 as a stand-alone project in Key 21400 with \$6,200,000 as shown below.

[home](#)
[admin](#)
[RTP](#)
[RFFA](#)
[MTIP](#)
[FUND](#)

[details](#)
[costs](#)
[programming](#)
[map](#)
[amendments](#)
[obligations](#)
[earmarks](#)
[comments](#)

ODOT Key: 21400 | MTIP ID: 71065
 I-205: I-5 - OR213, Phase 3 - Cycle 2018-21

Project(s) in this cycle are not editable

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Other (explain)	2019		\$0	\$0		\$0	<input type="checkbox"/>
Construction	2019		\$5,717,640	\$482,360		\$6,200,000	<input type="checkbox"/>
	2016	ACPO (92.22%)	\$5,717,640	\$482,360		\$6,200,000	
Totals >>			\$5,717,640	\$482,360	\$0	\$6,200,000	

Project Outreach Efforts

ODOT has involved the public with the project from the beginning through a series of public meetings, printed materials, social media, and online and in-person open houses. Since 2017, the project team has conducted/distributed:

- 28 community briefings with neighborhood groups in Oregon City, West Linn, and Clackamas County.
- Three online open houses:
 - November/December of 2017
 - June 2018
 - April 2021 (translated into Spanish)
- Two in-person open houses:
 - June 5, 2018 (West Linn)
 - June 6, 2018 (Oregon City)
- Four informational project newsletters to residents within ½-mile of the project area
 - October 2017
 - May 2018
 - January 2020
 - April 2021 (translated into Spanish, Russian, Vietnamese, Traditional Chinese, and Simplified Chinese)

Now on to Construction

With the passage of HB3055, ODOT now has the ability to move forward with the next major component, the I-205 Improvements 1A - OR43 to OR213, (or the Abernethy Bridge improvement segment). The \$375 million available through HB3055 is being programmed in FY 2021 in the Construction phase.

Metro		2021-24 Metropolitan Transportation Improvement Program (MTIP)			Formal Amendment ADD NEW PROJECT Add new I-205 Abernethy Bridge improvement project	
PROJECT AMENDMENT DETAIL WORKSHEET						
Lead Agency: ODOT	1	Project Type: Capital	ODOT Key: Z2167	MTIP ID: NEW-1BD	Status: 6	Comp Date: 9/30/2027
Project Name: I-205 Improvements 1A - OR43 to OR213		ODOT Type: Modern	RTP ID: 11969	RFFA ID: N/A	RFFA Cycle: N/A	UPWP Cycle: N/A
Project Status: 6 = Pre-construction activities (pre-bid, construction management oversight, etc.).		Performance Meas: Yes	Transfer Code: N/A	Past Amend: 0	OTC Approval: Yes	MTIP Amend #: J121-14-JUL3
Short Description: Abernethy Bridge segment to include bridge reconstruction/widening, lane widening, roundabout at I-205/OR43 IC construction, OR99 IC reconstruction, sound walls, stormwater improvements, and various paving, signage, and landscaping		Capacity Enhancing: Yes	OTC Approval: Yes	MTIP Amend #: J121-14-JUL3		
		Conformity Exempt: No				
		On State Hwy Sys: I-205				
		Mile Post Begin: 8.50				
		Mile Post End: 11.05				
		Length: 2.55				
		Flex Transfer to FTA: No				
		1st Year Program'd: 2021				
		Years Active: 0				
		STIP Amend #: 21-24-0942				
<p>Detailed Description: On I-205 from MP 8.50 to 11.05, complete the Abernethy Bridge improvement segment which includes constructing ground improvements, new foundations, sub-structure and superstructure and adding a lane in both directions of I-205. The I-205 NB and OR 43 IC will be reconstructed and include a roundabout. The OR 99 IC will be reconstructed to accommodate the bridge widening. Additional scope elements include a sound walls in the vicinity of SB I-205 at ExR 9, stormwater mitigation, landscaping, paving, striping, signing and lighting improvements.</p> <p>STIP Description: This segment of the project will seismically retrofit and widen the Abernethy Bridge by constructing ground improvements, new foundations, sub-structure and superstructure and adding a lane in both directions of I-205. The interchange at I-205 NB and OR 43 will be reconstructed and include a roundabout. The interchange at OR 99 will be reconstructed to accommodate the bridge widening. The project includes a noise wall in the vicinity of SB I-205 at Exit 9. Stormwater, landscaping, paving, striping, signing and lighting are also included as part of this project.</p>						
Last Amendment of Modification: None. Initial MTIP programming						
PROJECT FUNDING DETAILS						
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction
Federal Funds						
ADVCN	AGU	2021				\$ 375,000,000
						\$ 375,000,000
						\$ -
ADVCN is identified as 100% federal at this time						Federal Totals: \$ 375,000,000

<p>Additional Details:</p>	<h3 style="text-align: center;">Abernethy Bridge Improvement Aspects</h3>
<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 full/formal amendment.</p>
<p>Total Programmed Amount:</p>	<p>The estimated construction phase cost for key 22467, I-205 Improvements 1A - OR43 to OR213, is \$375 million.</p> <p>The total project cost for the entire I-205 improvement project including all segments is approximately \$500 million.</p>
<p>Added Notes:</p>	<p>Included attachments:</p> <ol style="list-style-type: none"> 1. I-205 Improvement Project Flyer 2. July 15, 2021 OTC Staff Report

Note: The Amendment Matrix located below 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.

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.

- 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:
 - 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 July #3 2021 Formal MTIP amendment (JL21-14-JUL3) will include the following:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	June 28, 2021
• TPAC notification and approval recommendation.....	July 9, 2021
• OTC meeting and HB3055 funding approval.....	July 15, 2021
• JPACT approval and recommendation to Council.....	July 15, 2021
• Completion of public notification process.....	July 27 , 2021
• Metro Council approval.....	July 29, 2021

Notes:

1. If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.
2. The formal amendment is progressing concurrently with ODOT approval actions which includes fiscal verification from OTC approval action on July15, 2021. If OTC does not approve the HB3055 funding commitment for the I-205 Improvements 1A - OR43 to OR213 project, then Formal Amendment JL21-14JUL3 will be re-evaluated to determine if fiscal constraint is still possible.

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.....	August 5, 2021
• Submission of the final amendment package to USDOT.....	August 5, 2021
• ODOT clarification and approval.....	Mid to late August 2021
• USDOT clarification and final amendment approval.....	Mid to late 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:

TPAC received their official notification on July 9, 2021 and now is providing JPACT with their approval recommendation of Resolution 21-5192 consisting of adding ODOT's I-205 Abernethy Bridge improvement project, officially titled as the "I-205 Improvements 1A - OR43 to OR213" project with \$375 million of construction funding.

2 Attachments:

1. I-205 Improvement Project Flyer
2. ODOT July 15, 2021 OTC Staff Report

I-205 IMPROVEMENTS

Stafford Road to OR 213



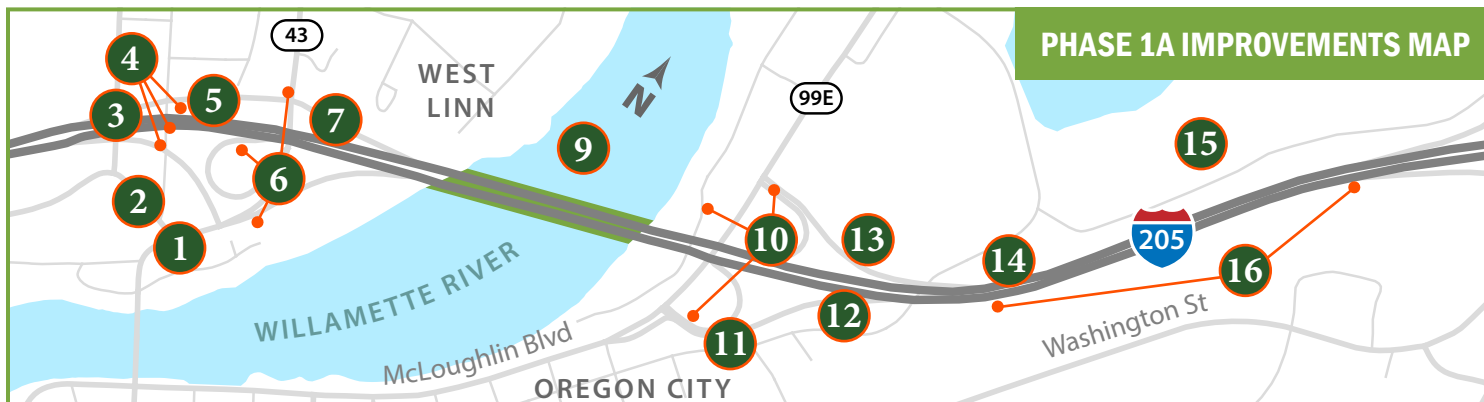
JUNE 2021

WWW.I205CORRIDOR.ORG

PHASE 1A: OR 43 TO OR 213

DETAILS FOR CONTRACTORS

The I-205 Improvements Project will improve our economy by providing Oregonians safer, more reliable access to work and critical services, even after an earthquake or other major disaster. We are constructing the project in phases, with the first phase between OR 43 and OR 213 kicking off in 2022.



IMPROVEMENTS INCLUDED IN PHASE 1A

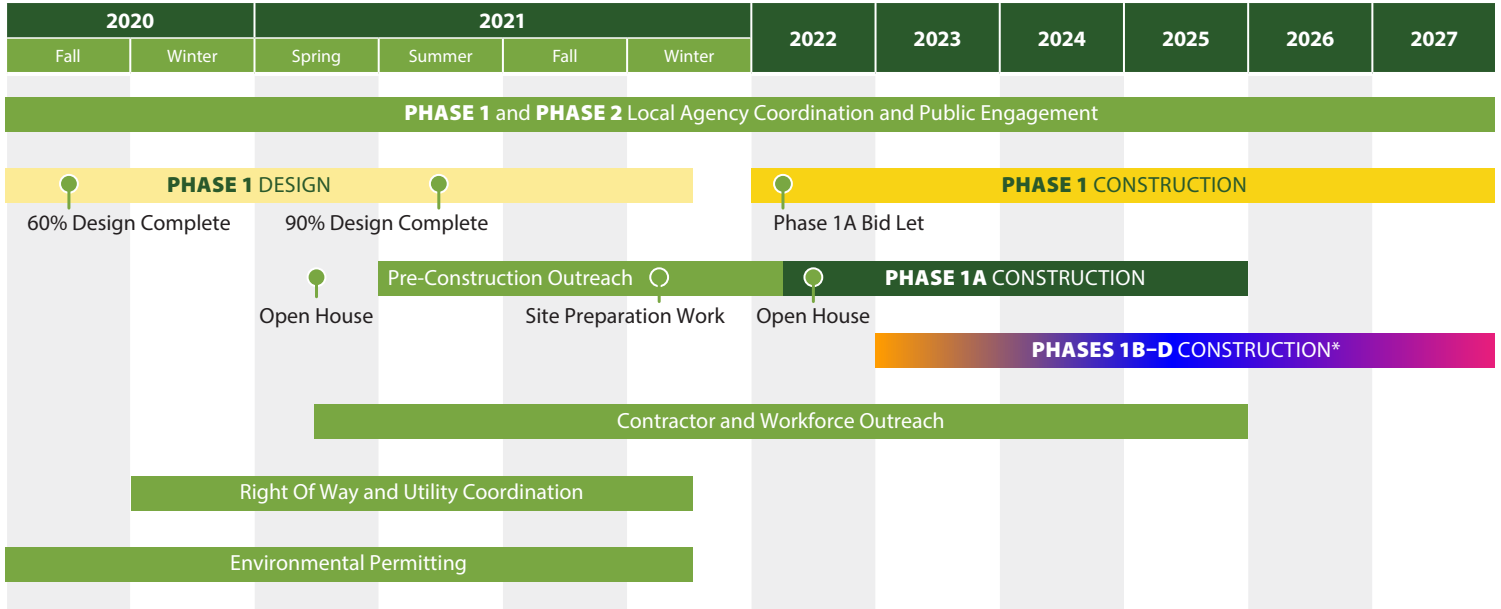
- | | |
|--|---|
| <ul style="list-style-type: none"> 1 Construct final configuration of Willamette Falls Drive/OR 43 intersection. 3 End roadwork at West A Bridge. <i>Bridge work in Phase 1C.</i> 5 Remove third southbound lane south of Abernethy Bridge. 7 Construct final configuration of OR 43 southbound intersection. 9 Carry three-lane configuration southbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge. 11 Construct Main Street wall. 13 Begin roadwork at Main Street Bridge. <i>Bridge work in Phase 1B.</i> 15 Re-stripe southbound lanes from two lanes plus an auxiliary lane to three lanes between OR 213 entrance and OR 99E exit. Install rumble strips. | <ul style="list-style-type: none"> 2 Construct final configuration of Willamette Falls Drive/Broadway intersection. 4 Temporary mainline widening and temporary ramp alignment. 6 Construct final configuration of OR 43 roundabout, northbound entrance and southbound exit ramp. 8 Maintain existing two-lane configuration northbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge. 10 Construct final configuration of OR 99E southbound and northbound ramp intersection, OR 99E entrance ramp and Clackamette Drive walls. 12 Construct half of the configuration of northbound entrance ramp. <i>Final configuration dependent on Main Street Bridge work in Phase 1B.</i> 14 Construct sound wall. <i>There is no southbound roadway widening in Phase 1A.</i> 16 Sign bridge for new southbound traffic configuration. |
|--|---|

I-205 IMPROVEMENTS

Stafford Road to OR 213



SCHEDULE



*Scheduling of Phases 1B, 1C and 1D is currently tentative and will be refined fall 2021.

FOR MORE INFORMATION

Workforce and Business Opportunities: www.I205Corridor.org

For other DBE information, visit:

www.oregon.gov/ODOT/Business/OCR/Pages/Disadvantaged-Business-Enterprise.aspx

Interested contractors can contact Allen Hendy, ODOT Project Manager, with questions or for more information:

Allen.HENDY@odot.state.or.us | 971-235-3861

For ADA (Americans with Disabilities Act) or Civil Rights Title VI accommodations, translation/interpretation services, or more information call 503-731-4128, TTY 800-735-2900 or Oregon Relay Service 7-1-1.

Si desea obtener información sobre este proyecto traducida al español, sírvase llamar al 503-731-4128.

Если вы хотите, чтобы информация об этом проекте была переведена на русский язык, пожалуйста, звоните по телефону 503-731-4128.

如果您想瞭解這個項目翻譯成 繁體中文 的相關資訊, 請致電 (503) 731-4128.

如果您想了解这个项目翻译成 简体中文 的相关信息, 请致电 503-731-4128.

이 프로젝트에 관한 한국어로 된 자료 신청방법 전화: 503-731-4128.

Nếu quý vị muốn thông tin về dự án này được dịch sang tiếng Việt, xin gọi 503-731-4128.

DATE: June XX, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda/Consent XX – Amend 2021-2024 Statewide Transportation Improvement Program (STIP) to increase funding and add a construction phase to the I-205 Improvements project.

Requested Action:

Amend the 2021 – 2024 Statewide Transportation Improvement Program (STIP) to increase funding for Preliminary Engineering (PE) funds for the I-205 Improvements project from \$32.2 million to \$50.7 million. The PE funds will increase by \$18.5 million and will be funded by the financial tools provided in House Bill 3055.

Establish the Construction (CN) funding for Phase 1A of the project. Amend the 2021 – 2024 STIP to program \$375 million in Construction funding for Phase 1A. The CN funds will be funded by the financial tools provided in House Bill 3055.

STIP Amendment Funding Summary:

Project	Current Funding	Proposed Funding
I-205: I-5 - OR213, Preliminary Engineering (PE)	\$32,200,000	\$50,700,000
I-205: I-5 - OR213, Phase 1A Construction (HB 3055)	\$0	\$375,000,000
TOTAL	\$32,200,000	\$425,700,000

Project to increase funding:

I-205: I-5 - OR213 (KN 19786)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	2016	\$12,452,305	\$12,452,305
Preliminary Engineering	2018	\$32,200,000	\$50,700,000
Right of Way	2019	\$2,460,000	\$2,460,000
Utility Relocation	N/A	\$0	\$0
Construction	N/A	\$0	\$0
TOTAL		\$47,112,305	\$65,612,305

Project to add:

I-205: I-5 - OR213, Phase 1A Construction (KN TBD)			
PHASE	YEAR	COST	
		Current	Proposed
Planning	N/A	\$0	\$0
Preliminary Engineering	N/A	\$0	\$0
Right of Way	N/A	\$0	\$0
Utility Relocation	N/A	\$0	\$0
Construction	2022	\$0	\$375,000,000
TOTAL		\$0	\$375,000,000

Background:

Project Overview

The I-205 Improvements Project improves the congested seven-mile section of Interstate 205 between OR213 and Stafford Rd. by widening and seismically retrofitting the Abernethy Bridge, adding the missing third general purpose lane (northbound and southbound), and creating safer options to enter and exit the corridor with an auxiliary lane from OR43 to OR213, and combining the OR 43 ramps. Once the project is complete, congestion will be reduced from 6.75 hours a day to 2, the Abernethy Bridge will be the first earthquake-ready state crossing of the Willamette River and eight other bridges will be rebuilt or seismically retrofitted.

The National Environmental Policy Act (NEPA) process was completed in December 2018 with a Documented Categorical Exclusion. As preliminary design progressed, three phases of construction were planned. Phase 1 constructs OR213 to 10th St. and reached 90% design in May 2021, Phase 2 completes 10th St. to Stafford Rd. and is currently at 60% design. Phase 3 was successfully completed on time and budget with the installation of Real Time traffic management signs in late 2020.

Multiple construction contracts will be let to deliver Phase 1, starting with Phase 1A. This phase will go to bid in December 2021, with construction beginning during the allowable in-water work window in summer 2022. Phase 1A includes Abernethy Bridge widening and seismic strengthening, highway construction, OR43 roundabout construction and ramp improvements, OR 99E interchange improvements, stormwater treatment, retaining walls, signing, striping, sign structures, illumination, and construction of a sound wall at Exit 9. Construction of Phase 1A is expected to end in 2026, after 4 in-water work cycles.

Phase 1A will be delivered with an alternative procurement method that scores technical qualifications, approach and cost. The Price-Plus-Multi-Parameter procurement is being used due to the highly complex and technical requirements associated with widening the Abernethy Bridge. In Price-Plus-Multi-Parameter, price is weighted at 40 percent and the technical approach and qualifications make up

the remaining 60 percent. Technical experience will be sought to match the complexities associated with the project including bridge construction/widening; drilled shafts; marine access; temporary traffic control and traffic maintenance; and permit compliance. ODOT is working with FHWA to supplement the Diversity Program goals that will be included in the contract for Disadvantaged Business Enterprises (DBEs), on the job training and Tribal Employment Rights Ordinance (TERO) program.

The addition of \$18.5 million would cover the remaining preliminary engineering costs for Phase 1 and Phase 2. Detailed planning will happen in summer/fall 2021 to determine construction sequencing, contract specifications, traffic management plans and cost estimates, and risk management tools for the Phase 1 contract bundles. This funding will support ongoing project development to fully develop the bid packages for the remaining portions of Phase 1 with the plan to complete construction in 2026.

Financial Plan

The Oregon State Legislature has identified toll revenue as the primary source of funding for this project and directed ODOT to develop a toll program for the I-5 and I-205 corridors. The process to implement a toll program is lengthy and it will take several years before any revenues are available to finance the project. Tolling is currently being evaluated under the National Environmental Policy Act (NEPA) process. The earliest tolling could be implemented is 2024 and toll revenue will not be available until that time.

The I-205 project will be constructed in phases; Phase 1A of the I-205 OR213 to Stafford Road project would seismically retrofit and expand the Abernethy Bridge over the Willamette River. Construction of Phase 1A of the project is expected to begin in FFY 2022, and is estimated to cost an additional \$372 million beyond what is already programmed in the STIP. Consequently a source of construction financing is needed to begin construction prior to a tolling decision. In the 2021 Legislative Session, legislation provides this financing through a combination of bonding and short-term borrowing. The legislation, HB 3055, will increase ODOT's short-term borrowing cap to \$600 million and allow for five year maturities. The bill will also allow the \$30 million authorized in HB 2017 (2017 Session), which begins in January 2022 and is currently set aside for the I-5 Rose Quarter project, to be shared between the Rose Quarter and the I-205 OR213 to Stafford Road and Toll Program development projects. Both of these changes provide a means to interim fund Phase 1A of the I-205 OR213 to Stafford Road project before toll revenue becomes available.

Attachments:

- Attachment 1 – PowerPoint
- Maps – Location and Vicinity

Memo



Date: June 30, 2021
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: July #3 2021 MTIP Formal Amendment & Resolution 21-5192 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-24 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD ODOT’S INTERSTATE 205 – ABERNETHY BRIDGE IMPROVEMENT SEGEMENT WHICH INCLUDES \$375 MILLION OF CONSTRUCTION PHASE FUNDING (JL21-14-JUL3)

BACKGROUND

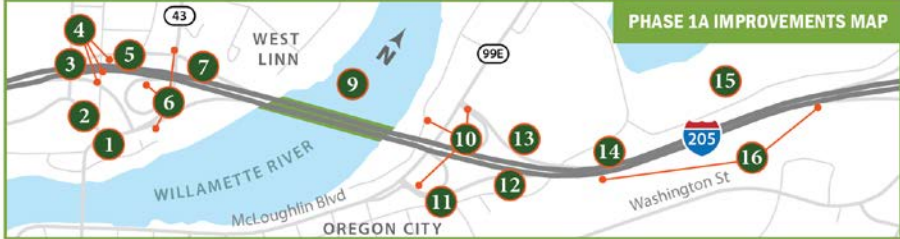
What This Is:

The July #3 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment which is contained in Resolution 21-5192, (I-205 Abernethy Bridge improvement segment) and being processed under MTIP Amendment JL21-14-JUL3 and applies only to ODOT.

What is the requested action?

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 21-5192 consisting of adding ODOT’s I-205 Abernethy Bridge improvement project, officially titled as the “I-205 Improvements 1A - OR43 to OR213” project with \$375 million of construction funding.

Proposed July #3 2021 Formal Amendment Bundle					
Amendment Type: Formal/Full					
Amendment #: JL21-14-JUL3					
Total Number of Projects: 1					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 22467 New Project	TBD	ODOT	I-205 Improvements 1A - OR43 to OR213	Abernethy Bridge improvement segment to include bridge reconstruction/widening, lane widening, roundabout at I-205/OR43 IC construction, OR99 IC reconstruction, sound walls, stormwater improvements, and various paving, signage, and landscaping	<u>ADD NEW PROJECT:</u> The formal amendment adds ODOT’s new I-205 Improvements 1A – OR43 to OR213, (also referred to as the Abernethy Bridge improvement segment) to the 2021-2024 MTIP.

<p>Project 1:</p>	<p>I-205 Improvements 1A - OR43 to OR213 (New Project)</p>		
<p>Lead Agency:</p>	<p>ODOT</p>		
<p>ODOT Key Number:</p>	<p>22467</p>	<p>MTIP ID Number:</p>	<p>TBD</p>
<p>Project Description and Overview:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> <p>General: ODOT's I-205 Improvements 1A - OR43 to OR213 project is one of several improvement packages/segments within the larger I-205 improvement project, "I-205: I-5 to OR213, Phase 1".</p> <p>The project was originally programmed in Key 19786. (Key 19786 also is commonly referred to as the I-205 3rd Lane project). Key 22467 represents a "child" project to the parent in Key 19786. Additional details are provided explaining this in the "What is Changing" section after the Amendment Action statement.</p> <p><u>Metro SFY 2022 UPWP Project:</u> No</p> <p><u>Proposed improvements:</u> The I-205: I-5 to OR213, Phase 1 project will provide multiple and significant improvements to I-205 and to the Abernethy Bridge. Major scope elements include the following:</p> <p>PHASE 1A: OR 43 TO OR 213</p> <p>DETAILS FOR CONTRACTORS</p> <p>The I-205 Improvements Project will improve our economy by providing Oregonians safer, more reliable access to work and critical services, even after an earthquake or other major disaster. We are constructing the project in phases, with the first phase between OR 43 and OR 213 kicking off in 2022.</p>  <p>The map shows 16 numbered construction sites along the I-205 corridor. Sites 1-7 are located between OR 43 and West Linn. Sites 8-16 are located between West Linn and OR 213. Key landmarks include the Willamette River, McLoughlin Blvd, and Washington St.</p> <ol style="list-style-type: none"> Construct final configuration of Willamette Falls Drive/OR 43 intersection. Construct final configuration of Willamette Falls Drive/Broadway intersection. End roadwork at West A Bridge. <i>Bridge work in Phase 1C.</i> Complete temporary mainline widening and temporary ramp alignment. Remove third southbound lane south of Abernethy Bridge. 		

6. Construct final configuration of OR 43 roundabout, northbound entrance and southbound exit ramp.
7. Construct final configuration of OR 43 southbound intersection.
8. Maintain existing two-lane configuration northbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge
9. Carry three-lane configuration southbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge.
10. Construct final configuration of OR 99E southbound and northbound ramp intersection, OR 99E entrance ramp and Clackamette Drive walls.
11. Construct Main Street wall.
12. Construct half of the configuration of northbound entrance ramp.
Final configuration dependent on Main Street Bridge work in Phase 1B.
13. Begin roadwork at Main Street Bridge (*Bridge work in Phase 1B*).
14. Construct sound wall.
15. Re-stripe southbound lanes from two lanes plus an auxiliary lane to three lanes between OR 213 entrance and OR 99E exit. Install rumble strips.
16. Sign bridge for new southbound traffic configuration.

- **Source:** New project.
Key 22467 is a child project (construction phase) to the parent in Key 19786 (PE and ROW phases). Key 22467 is considered a new project to the MTIP.
- **Amendment Action:** Add project
Under Key 22467, the construction phase is being added in federal fiscal year 2021 to the 2021-24 MTIP
- **Funding:**
When all segments/phase/packages that are part of the complete I-205: I-5 to OR213, phase 1 improvement project, the estimated total project cost is estimated at \$500 million. The construction phase for Key 22467, I-205 Improvements 1A - OR43 to OR213 (Abernethy Bridge and area improvements) totals \$375 million. Funding for the construction phase originates from Oregon HB3055. The legislation was passed on 6/26/2021.

81st OREGON LEGISLATIVE ASSEMBLY--2021 Regular Session

House Bill 3055

Sponsored by JOINT COMMITTEE ON TRANSPORTATION (at the request of Representative Susan McLain,
Senator Lee Beyer)

HB3055 makes housekeeping changes to the statutes governing the Oregon Department of Transportation (ODOT) operations. In addition to the housekeeping changes, the measure changes the following:

- Changes tolling statutes to include language around managing demand and improving operations as part of the rationale for assessing tolls;
- Allows the dedicated \$30 million in State Highway Fund annual revenue for the I-5 Rose Quarter Project to also be used to pay for:
 - **The I-205 Improvements: Stafford Road to Oregon Route 213 Project;**
 - The I-5 Boone Bridge and Seismic Improvement Project
 - The implementation of the toll program established under ORS 383.150.
- **Increases ODOT’s short-term borrowing authority from \$100 million to \$600 million and extends maximum maturity of short-term obligations from 3 to 5 years;**
- Renames the State Tollway Account the Toll Program Fund and establishes the fund as separate and distinct from the State Highway Fund; and
- Authorizes the State Treasurer, at the request of ODOT, to issue tollway project revenue bonds for the purpose of financing tollway projects.

Added note: The funding commitment to the I-205 project requires approval from the Oregon Transportation Commission (OTC). The OTC will consider the funding commitment during their July 15, 2021 meeting. The formal MTIP amendment is progressing concurrently with ODOT required approval stapes. However, the MTIP amendment’s approval is contingent upon OTC’s July 15, 2021 approval vote.

-
- FTA Conversion Code: N/A
 - Location, Limits and Mile Posts:
 - Location: On I-205 in and around the Abernethy Bridge across the Willamette River in West Linn and Oregon City
 - Cross Street Limits: Multiple
 - Overall Mile Post Limits: MP 8.50 to 11.05
 - Current Status Code: 6 = Pre-construction activities (pre-bid, construction management oversight, etc.).
 - Air Conformity/Capacity Status:
The project is considered a “capacity enhancing” project from a roadway/motor vehicle improvement perspective and is not exempt

	<p>from air quality conformity analysis per 40 CFR 93.126. The project completed its required transportation and air quality modeling analysis as part of the 2018 RTP Update. The RTP project ID is 11969.</p> <ul style="list-style-type: none"> • <u>Regional Significance Status:</u> The project is regionally significant. The project is located on the Metro Motor Vehicle modeling network, contains federal funds, and includes capacity enhancing scope of work elements. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0942 ○ MTIP Amendment Number: JL21-14-JUL3 ○ OTC approval required: Yes. OTC approval of the \$375 million funding commitment to Key 22467 scheduled to occur on July 15, 2021. The MTIP amendment is progressing concurrently with required OTC actions and is contingent upon OTC approval. ○ Metro approval date: Tentatively scheduled for July 29th, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT:</u></p> <p>The formal amendment adds the new project consisting with \$375 million of funding committed to the construction phase. Approval of the MTIP amendment is contingent upon OTC approval for the funding which is scheduled to occur during their July 15, 2021 meeting.</p> <p><i><u>Programming Background Summary</u></i></p> <p>Approximately 100,000 vehicles travel through the project area, which consists of the seven-mile stretch of I-205 between OR 213 and Stafford Road. It is the only section of I-205 with two travel lanes in each direction, creating a bottleneck that impacts the flow of traffic and freight throughout the region. The project area experiences the following issues:</p> <ul style="list-style-type: none"> • 6.75 hours of congestion per day, on average • A large volume of crashes – between 2014 and 2018, there were 896 crashes in the corridor • Approximately \$10.9 million per year from injuries, property damage, freight delays and fuel costs related to crashes <p>In addition to adding a third travel lane in each direction, the project will upgrade the Abernethy Bridge to make it seismically resilient. The Portland Metro Area is susceptible to significant infrastructure damage in the event of a large natural disaster and currently does not have a north-south lifeline route. Upgrading the Abernethy Bridge, and eight other bridges in the corridor, to be seismically resilient will provide this north-south lifeline route so that people and goods can safely travel through the region in the event of a disaster. This flow of people and goods will have regional impacts for the rest of the state and Washington.</p>

A mentioned earlier, Key 22467 (reflecting the construction phase for the I-205 Improvements 1A - OR43 to OR213 project), is a child project to the parent I-205: I-5 to OR213 improvement project in Key 19786. Delivery of the overall construction phase for the I-205 improvement project is divided into multiple segments. As the funding for the construction phase for these segments is obtained and committed, the segment is split-off as a child project and programmed accordingly.

Per the ODOT OTC Staff Report from April 6, 2018, the I-205 improvement is described as follows:

The purpose of the project is to reduce congestion on the Interstate 205 corridor between Stafford Road and Oregon 99 East in Clackamas County. The project scope includes four main components:

- Widen and seismically retrofit the George Abernethy Bridge near Oregon City.
- Retrofit or replace the other seismically vulnerable bridges carrying Interstate 205 in the project corridor.
- Widen the freeway to three northbound and three southbound lanes between Stafford Road and Oregon 99 East.
- Modify interchanges at Oregon 43 and Oregon 99 East to conform to the additional freeway lanes and add Active Traffic Management (ATM) elements consistent with the Oregon Department of Transportation (ODOT) Region 1’s ATM Project Atlas.

The I-205 Improvements 1A - OR43 to OR213 in Key 22467 addresses the required improvements that are part of the Abernethy Bridge segment. An overview of the full project is shown below.



MTIP and STIP programming began with Key 19786 in 2016 project development and then Preliminary Engineering (PE) activities were added in 2018 to the MTIP. The Right-of-Way (ROW) phase was added to the TIP and STIP in 2019 as shown below. A total of \$47,500,000 was programmed supporting project Development (Planning), PE, and ROW.

home	admin	RTP	RFFA	MTIP	FUND	search	
details	costs	programming	map	amendments	obligations	earmarks	comments

ODOT Key: 19786 | MTIP ID: 70859
I-205: I-5 TO OR213, Phase 1 - Cycle 2018-21

Project(s) in this cycle are not editable

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2016		\$11,527,500	\$972,500	\$2,500,000	\$15,000,000	<input type="checkbox"/>
	2016	NHFP (Z460) 92.22%	\$11,527,500	\$972,500	\$0	\$12,500,000	
	2018	OTHER - LOCAL		\$0	\$2,500,000	\$2,500,000	
Preliminary engineering	2018		\$15,769,620	\$1,330,380	\$12,900,000	\$30,000,000	<input type="checkbox"/>
	2016	ACPD (92.22%)	\$15,769,620	\$1,330,380		\$17,100,000	
	2018	HB2001 (B4A0)		\$0	\$12,900,000	\$12,900,000	
Purchase right of way	2019			\$0	\$2,500,000	\$2,500,000	<input type="checkbox"/>
	2018	HB2001 (B4A0)		\$0	\$2,500,000	\$2,500,000	
Totals >>			\$27,297,120	\$2,302,880	\$17,900,000	\$47,500,000	

The first project components/segment ready to move forward into construction with committed funding was the Active Traffic Management improvement portion. The major scope elements for this segment were to install active traffic management (ATM) improvements throughout the project limits to help travelers get where they are going safely and efficiently. These signs can display traffic flow information, roadway conditions, and advisory speed limits. This child project was split-off the parent in Key 19786 and programmed in the MTIP and STIP in 2019 as a stand-alone project in Key 21400 with \$6,200,000 as shown below.

home	admin	RTP	RFFA	MTIP	FUND	search	
details	costs	programming	map	amendments	obligations	earmarks	comments

ODOT Key: 21400 | MTIP ID: 71065
I-205: I-5 - OR213, Phase 3 - Cycle 2018-21

Project(s) in this cycle are not editable

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Other (explain)	2019		\$0	\$0		\$0	<input type="checkbox"/>
Construction	2019		\$5,717,640	\$482,360		\$6,200,000	<input type="checkbox"/>
	2016	ACPD (92.22%)	\$5,717,640	\$482,360		\$6,200,000	
Totals >>			\$5,717,640	\$482,360	\$0	\$6,200,000	

Project Outreach Efforts

ODOT has involved the public with the project from the beginning through a series of public meetings, printed materials, social media, and online and in-person open houses. Since 2017, the project team has conducted/distributed:

- 28 community briefings with neighborhood groups in Oregon City, West Linn, and Clackamas County.
- Three online open houses:
 - November/December of 2017
 - June 2018
 - April 2021 (translated into Spanish)
- Two in-person open houses:
 - June 5, 2018 (West Linn)
 - June 6, 2018 (Oregon City)

	<ul style="list-style-type: none">• Four informational project newsletters to residents within ½-mile of the project area<ul style="list-style-type: none">○ October 2017○ May 2018○ January 2020○ April 2021 (translated into Spanish, Russian, Vietnamese, Traditional Chinese, and Simplified Chinese) <p><u><i>Now on to Construction</i></u></p> <p>With the passage of HB3055, ODOT now has the ability to move forward with the next major component, the I-205 Improvements 1A - OR43 to OR213, (or the Abernethy Bridge improvement segment). The \$375 million available through HB3055 is being programmed in FY 2021 in the Construction phase.</p>
Additional Details:	Abernethy Bridge Improvement Aspects

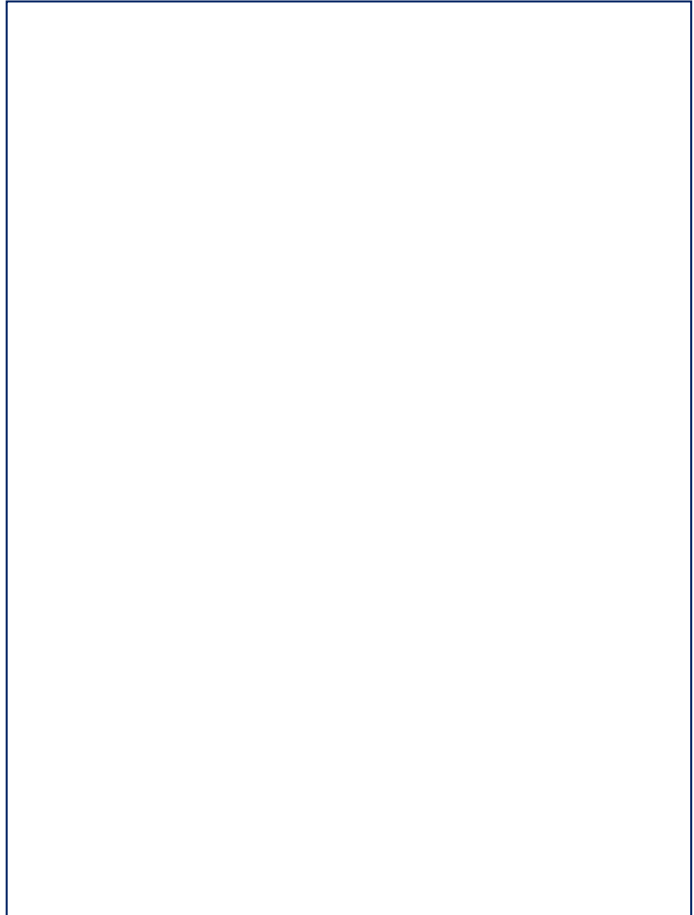
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a full/formal amendment.</p>
<p>Total Programmed Amount:</p>	<p>The estimated construction phase cost for key 22467, I-205 Improvements 1A - OR43 to OR213, is \$375 million. The total project cost for the entire I-205 improvement project including all segments is approximately \$500 million.</p>
<p>Added Notes:</p>	<p>Included attachments: 1. I-205 Improvement Project Flyer 2. July 15, 2021 OTC Staff Report</p>

Note: The Amendment Matrix located below 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:



- 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 July #3 2021 Formal MTIP amendment (JL21-14-JUL3) will include the following:

<u>Action</u>	<u>Target Date</u>
● Initiate the required 30-day public notification process.....	June 28, 2021
● TPAC notification and approval recommendation.....	July 9, 2021
● OTC meeting and HB3055 funding approval.....	July 15, 2021
● JPACT approval and recommendation to Council.....	July 15, 2021
● Completion of public notification process.....	July 27, 2021
● Metro Council approval.....	July 29, 2021

Notes:

1. If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.
2. The formal amendment is progressing concurrently with ODOT approval actions which includes fiscal verification from OTC approval action on July15, 2021. If OTC does not approve the HB3055 funding commitment for the I-205 Improvements 1A - OR43 to OR213 project, then Formal Amendment JL21-14JUL3 will be re-evaluated to determine if fiscal constraint is still possible.

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.....	August 5, 2021
● Submission of the final amendment package to USDOT.....	August 5, 2021
● ODOT clarification and approval.....	Mid to late August 2021
● USDOT clarification and final amendment approval.....	Mid to late 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 21-5192 consisting of adding ODOT's I-205 Abernethy Bridge improvement project, officially titled as the "I-205 Improvements 1A - OR43 to OR213" project with \$375 million of construction funding.

2 Attachments:

1. I-205 Improvement Project Flyer
2. ODOT July 15, 2021 OTC Staff Report

**4.4 Regional Mobility Policy Update -
Recommendation to Test Potential Mobility Policy
Measures Through Case Studies**

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

Memo

Date: June 30, 2021

To: Joint Policy Advisory Committee on Transportation (JPACT) and Interested Parties

From: Kim Ellis, Metro Project Manager
Lidwien Rahman, ODOT Project Manager

Subject: Regional Mobility Policy Update: Recommendation to Test Potential Mobility Policy Measures Through Case Studies – RECOMMENDATION TO METRO COUNCIL

ACTION REQUESTED

JPACT recommendation to the Metro Council to support moving forward to the next phase of research for the project and test the potential mobility policy measures shown in **Attachment 1** through case studies. The measures are briefly described in **Attachment 2**.

Note: The Transportation Policy Alternatives Committee (TPAC) is scheduled to make a recommendation to JPACT on July 9. Staff will send any changes recommended by TPAC in advance of the JPACT meeting.

BACKGROUND

Metro and the Oregon Department of Transportation (ODOT) are working together to update the policy on how we define and measure mobility in the Portland region in the Oregon Highway Plan (OHP), Regional Transportation Plan (RTP), local transportation system plans (TSPs) and corridor plans, and during the local comprehensive plan amendment process.

The current 20-year old mobility policy is contained in both the 2018 [Regional Transportation Plan](#) (RTP) and Policy 1F (Highway Mobility Policy) of the [Oregon Highway Plan](#) (OHP). The policy relies on a vehicle-based measure of mobility (and thresholds) to evaluate current and future performance of the motor vehicle network during peak travel periods. The measure, also known as the v/c ratio, is the ratio of motor vehicle volume to motor vehicle capacity of a given roadway. ¹

What is the Regional Mobility Policy?

State, regional and local transportation plans have many policies; the mobility policy is just one of them.

Last updated in 2000, the region's mobility policy relies on a vehicle-based measure of mobility and thresholds adopted in the Regional Transportation Plan (RTP) and Policy 1F of Oregon Highway Plan (OHP). The measure is referred to as the volume-to-capacity ratio (v/c ratio).

In the past, people often thought of mobility as our system of roads and how we use them—the way traffic flows throughout the day. And, historically, planners and engineers have evaluated performance of transportation systems using the v/c measure for these purposes:

- System planning for the future*
- Evaluating transportation impacts of local comprehensive plan amendments*
- Mitigating development impacts
- Managing and designing roads

An improved mobility policy should consider and balance mobility for people riding a bus or train, biking, walking or moving goods. It should consider why, where, and when people need to travel, how long it takes to reach a destination, how reliable the trip is and if the system is safe for all users.

* The focus of this update.

¹ For example, when the v/c ratio of a roadway equals 0.90, 90 percent of the roadway's vehicle capacity is being used. At 1.0, the vehicle capacity of the roadway is fully used.

The 2018 RTP failed to meet state requirements for demonstrating consistency with the OHP Highway Mobility Policy (Policy 1F) under the current mobility targets for state-owned facilities in the region. As a result, ODOT agreed to work with Metro to update the mobility policy for the Portland area in both the 2018 RTP and OHP Policy 1F.

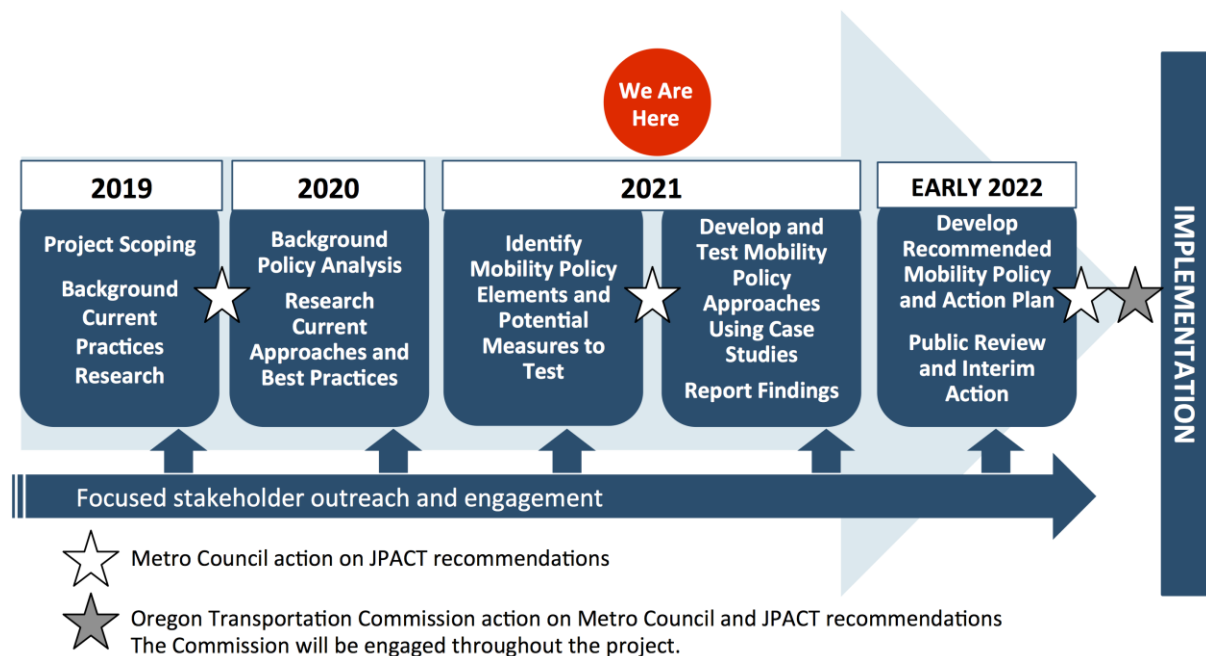
The 2018 RTP is built around four key priorities of advancing equity, mitigating climate change, improving safety and managing congestion. When the mobility policy update was defined and adopted unanimously in Chapter 8 of the 2018 RTP, JPACT and the Metro Council recognized this work must better align how we measure mobility and adequacy of the transportation system for people and goods with the RTP policy goals for addressing equity, climate, safety, and congestion as well as support other state, regional and local policy objectives, including implementation of the 2040 Growth Concept and the region’s Climate Smart Strategy. This comprehensive set of shared regional values, goals and related desired outcomes identified in the RTP and 2040 Growth Concept, as well as local and state goals are guiding to this update.



Project timeline

Shown in **Figure 1**, the Regional Mobility Policy update began in 2019 and will be completed in Spring 2022.

Figure 1. Project Timeline



MOBILITY POLICY ELEMENTS AND POTENTIAL MEASURES RECOMMENDED FOR TESTING THROUGH CASE STUDIES

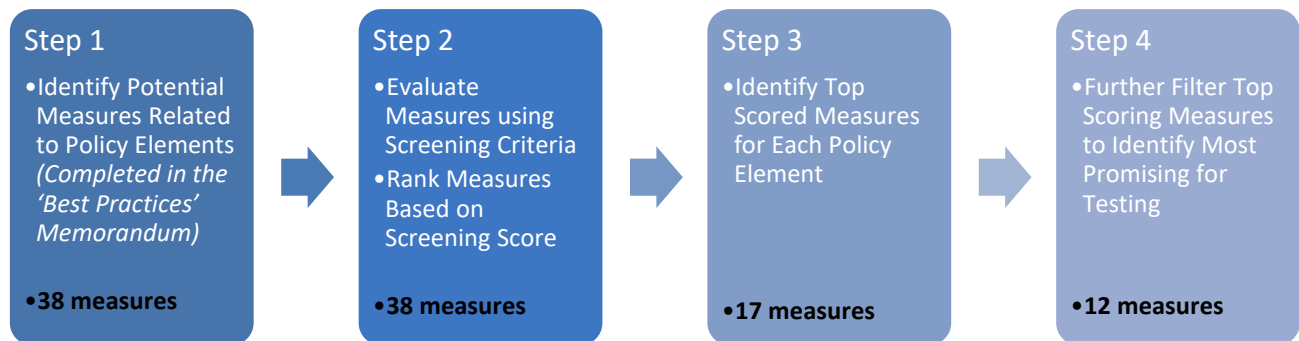
The elements and measures recommended for further evaluation and testing are provided in **Attachment 1**. An overview of the process used to shape this recommendation follows.

From Fall 2019 to June 2020, the Transportation Research and Education Center (TREC)/Portland State University documented current mobility-related performance measures and methods being used in the Portland region, statewide and nationally. The [Portland State University's Synthesis Research on Current Measures and Tools](#) reviews the existing mobility policy and summarizes current practices in measuring multimodal mobility.

In 2020, the project team reviewed [previous input from historically marginalized and underserved communities](#) and other stakeholders from the [2018 Regional Transportation Plan update](#), development of the [Get Moving 2020 investment package](#) and the [Scoping Engagement Process](#) for this effort. Based on this review and additional feedback received through two workshops with the TPAC and Metro Technical Advisory Committee (MTAC) in fall 2020, five key transportation outcomes were identified as integral to how we view mobility in the Portland region.

In Fall 2020, TPAC and MTAC also provided feedback on criteria to be used to screen and select potential mobility performance measures for testing that address one or more mobility policy elements. Since January 2021, the Consultant team applied the screening criteria through a four-step process (shown in **Figure 2**) to narrow a list of 38 potential mobility measures to 12 potential mobility measures that appear most promising for testing and further evaluation through case studies this summer. [A technical memo](#) and supporting documents describing the screening process is available on the project website.

Figure 2: Screening Process to Inform Selection of Potential Mobility Measures for Testing



In spring 2021, the project team engaged policymakers, practitioners, community leaders and other stakeholders to review and provide feedback on the draft mobility policy elements and potential measures to include in the updated policy. Throughout May and June, the project team engaged stakeholders through online forums, briefings and committee meetings. The four online forums included two forums for planning, modeling and engineering practitioners, a forum for goods and freight professionals, and a forum for community leaders. A total of about 130 people participated in the forums.

Project staff also presented and received feedback at County Coordinating Committees (staff and policy), MTAC, TPAC, the Metro Policy Advisory Committee (MPAC), JPACT and the Metro Council – representing more than 350 individual points of input.

Key Themes from Spring 2021 Stakeholder Input

- **Equity and climate should be explicit** in the updated mobility policy
- **Many aspects of access** are important to mobility:
 - Access to places
 - Access to travel options
 - Affordability is key to access
- **Efficient use of the transportation system** is important to mobility
- **Quality, seamless connections between travel options** are important to mobility
- **Ensure that all elements are reflected** across the measures
- **Ensure measures are focused on people and places**, many seem vehicle-focused
- **Avoid redundancy in the measures**
- **Ensure flexibility to allow for different measures in different contexts** (land use and transportation functions), **without being overly complex**

A [Stakeholder Engagement Report](#) documenting the engagement process and input received is included in the meeting packet for reference. The Report and [supporting Appendices](#) are also available on the project website: www.oregonmetro.gov/mobility.

Together, past research and input, the technical screening process and subsequent stakeholder input helped shape the recommendation to JPACT and Metro Council on the revised mobility policy elements and measures to be further evaluated and tested through case studies. It is important to note that climate and emissions were not explicitly included in the revised mobility policy elements or mobility measures recommended to move forward. However, the revised elements and potential measures do

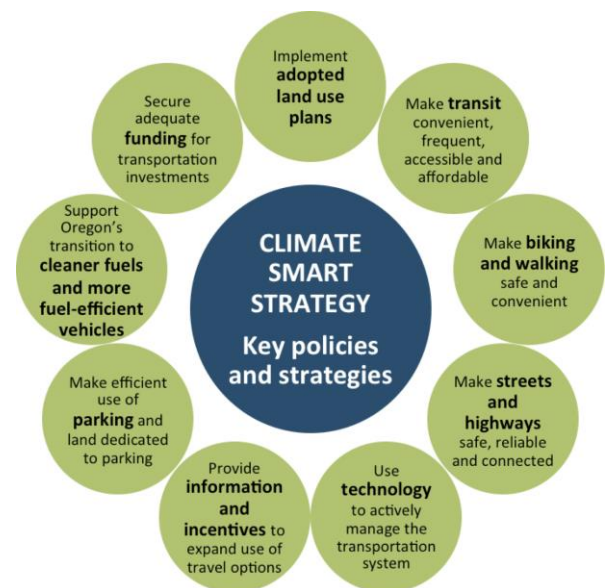


Figure 3. The Climate Smart Strategy policies are adopted in the 2018 Regional Transportation Plan.

support and advance the region's efforts to reduce greenhouse gas emissions and implement the Climate Smart Strategy and related climate leadership policies adopted in the 2018 RTP as shown in **Figure 3**. This approach keeps the mobility policy focused on elements of mobility, and supports other RTP policies related to climate.

OVERVIEW OF CASE STUDIES RESEARCH

Pending JPACT and Metro Council support to move forward, the next phase of research will focus on learning more about each of the potential new mobility measures and potential ways in which the measures could be applied across different land use/transportation contexts and planning applications. The project team will further evaluate and test the potential measures through 4 to 6 case studies to see how well the measures assess the mobility elements for different contexts and planning applications and meet other needs.

Developed based on TPAC and MTAC feedback in fall 2020, the criteria listed in **Attachment 3** will be the focus of the case study research to consider:

- technical feasibility;
- flexibility for intended planning applications and different contexts;
- legal defensibility;
- current uses of the measures by ODOT, Metro, local governments and other states and metropolitan planning organizations (MPOs); and
- ability to show impact or progress toward desired mobility elements.

Consistent with OHP Policy 1F (Action 1F.3) and [Operational Notice PB-02](#), the case study analysis must compare the current mobility policy measures and methods to other new potential measures and methods being tested. The measures will be tested at the system planning, and plan amendment scales; however, not all measures will be tested in all case studies. The Consultant team is currently developing a framework to identify which measures to test in different land use/transportation contexts and planning applications.

Considerations for the case studies include:

- Measures may be used differently for different planning applications (i.e. system planning versus plan amendments).
- Not all measures are easily applied as a standard. At the system planning-level, a measure may be applied as a target, with assessment whether a system is trending appropriately or if a project is projected to move the system closer to the target.

Findings will be developed for each case study and summarized in a report and supporting factsheets documenting this research, including:

- Map(s) showing the location of each case study
- Supporting contextual information and findings

- Conclusions and preliminary recommendations for an updated regional mobility policy, including measures, targets and methods for application to system planning and plan amendments.

The findings and preliminary recommendations from this research and subsequent stakeholder input and direction from JPACT and the Metro Council will be used by the project team to develop a recommended mobility policy for the RTP and proposed amendments to Policy 1F of the OHP, including measures, targets/standards and methodologies.

Case Study Locations

The recommended case study locations are listed below, and shown in **Attachment 4**. The locations are selected from the [examples of current approaches](#) studied earlier in the process to build on the information and materials developed during the previous research.

The case studies will focus on these system planning and plan amendment examples:

1. **Downtown Portland area**, which includes RTP Mobility Corridor #4 (I-405 loop/Portland Central City)
 - **Example #2:** Portland Central City 2035 Plan and MMA (Plan Amendment)
2. **Middle Columbia Corridor Industrial area**, which includes RTP Mobility Corridor #18 (US 30/Columbia/Lombard/Killingsworth, I-205 and I-5 and PDX Airport and other industrial lands)
 - **Example #3:** Colwood Industrial District (Plan Amendment)
3. **Oregon City area**, which includes RTP Mobility Corridor #8 (I-205 between Gateway and downtown Oregon city)
 - **Example #6:** Oregon City TSP and OR 213/Beavercreek Road (System Planning)
 - **Example #7:** Willamette Falls/Downtown District Plan/MMA (Plan Amendment)
4. **Tualatin Valley Highway area**, which includes RTP Mobility Corridor #14 (Tualatin Valley Highway and US 26 between Beaverton and Hillsboro)
 - **Example #10:** West End District Mixed-use Development (Development Review)
 - **Example #11:** Tualatin Valley Highway/OR 8 Corridor Plan (System Planning)
 - **Example #12:** South Hillsboro Community Development Plan (Plan Amendment)

The process for selecting case study locations included first selecting plan amendment examples in each county, and then selecting system planning examples and mobility corridor geographies that encompass the plan amendment locations. This approach allows for leveraging data and analysis to the extent possible and consideration of the relationship between system planning and plan amendment analysis needs. An effort was made to select areas that include different land use and

transportation contexts – downtowns, major urban corridors and industrial areas that also include arterials and throughways designated in the RTP.

NEXT STEPS

A summary of the remaining steps in the process (and anticipated schedule) follows.

Conduct Case Study Analysis and Prepare Findings **July to Sept. 2021**
Pending JPACT and Metro Council support to move forward in July, the project team will test the potential measures through 4 to 6 case studies to see how well the measures assess the mobility elements for different planning applications. As required by OHP Policy 1F (Action 1F.3) and [Operational Notice PB-02](#), the case study analysis will compare the current mobility policy measures (volume-to-capacity ratio) and methods to other new potential measures and methods being tested for application at the system planning and plan amendment scales. The details of the analysis approach are under development.

Report Case Study Findings **Oct. to Nov. 2021**
In Fall 2021, staff will report research findings from the case studies to stakeholders and decision-makers which will help inform developing a recommended mobility policy for the RTP and proposed amendments to Policy 1F of the OHP. A schedule of engagement activities and opportunities for input is under development.

Draft Updated Mobility Policy and Action Plan to Implement Policy **Winter 2021/22**
Staff will continue to engage TPAC and MTAC in developing an updated regional mobility policy and implementation plan for public review and discussion in early 2022 by JPACT, MPAC, and the Metro Council. This work will include crafting draft policy language and guidance related to use and applicability of the recommended performance measures, targets/standard, data, methodologies and processes.

In addition, this project will develop guidance to jurisdictions on how to balance multiple policy objectives and document adequacy, i.e. consistency with the RTP and OHP, in both transportation system plans (TSPs) and plan amendments, when there are multiple measures and targets in place. Finally, the project will recommend considerations for future local, regional and state actions outside the scope of this project to implement the new policy and to reconcile differences between the new TSP and plan amendment measures and targets and those used in development review and project design processes.

Conduct “Tentative” Approval Process **Winter/Spring 2022**
A 45-day public comment period and hearings will be held in 2022. Additional refinements will be recommended to address feedback received during the public comment period for consideration by JPACT and the Metro Council during the approval process.

Pending “tentative” approval and direction by the JPACT, the Metro Council and expressed support from the OTC in Spring 2022, the updated policy will be applied in the next update to the RTP (due in Dec. 2023). In addition, the recommended policy will be forwarded to the OTC for consideration as an amendment to the OHP 1F (Table 7 and related policies for the state-owned facilities in the Portland region).

Pending adoption of the 2023 RTP by JPACT and the Metro Council and amendment of the OHP by the OTC, the updated policy will guide development of regional and local transportation plans and studies, and the evaluation of potential impacts of plan amendments and zoning changes subject to the Transportation Planning Rule.

/Attachments

Attachment 1. Mobility Policy Elements and Potential Measures Recommended for Testing

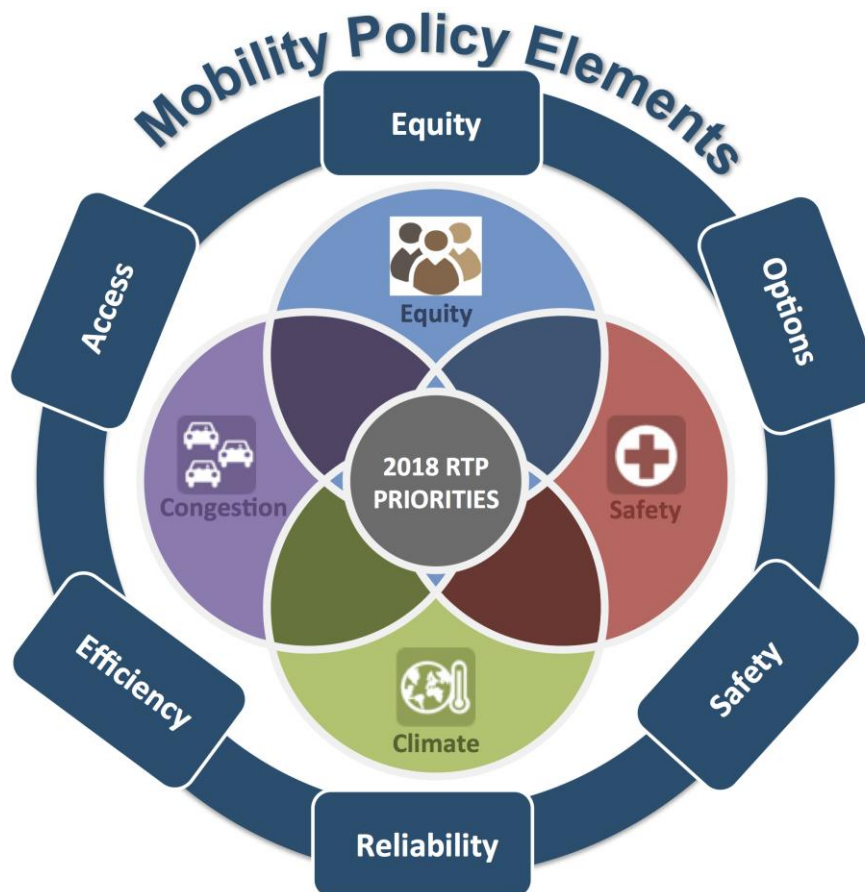
Attachment 2. Definitions of Potential Mobility Measures

Attachment 3. Criteria for Evaluating Potential Mobility Measures in Case Studies

Attachment 4. Case Study Locations to Test Potential Mobility Measures

REVISED MOBILITY ELEMENTS AND MEASURES

DRAFT definition of urban mobility: *People and businesses can safely, affordably, and efficiently reach the goods, services, places and opportunities they need to thrive by a variety of seamless and well-connected travel options and services that are welcoming, convenient, comfortable, and reliable.*



Mobility elements to be reflected in updated policy

Equity

Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other historically marginalized and underserved communities experience equitable mobility.

Access

People and businesses can conveniently and affordably reach the goods, services, places and opportunities they need to thrive.

Efficiency

People and businesses efficiently use the public's investment in our transportation system to travel where they need to go.

Reliability

People and businesses can count on the transportation system to travel where they need to go reliably and in a reasonable amount of time.

Safety

People are able to travel safely and comfortably and feel welcome.

Options

People and businesses can choose from a variety of seamless and well-connected travel modes and services that easily get them where they need to go.

Mobility measures recommended for testing

- Multimodal level of service**
 - Multimodal level of service (MMLOS)
 - Level of traffic stress
 - Pedestrian crossing index
 - System completion
 - Queuing
 - Volume to capacity ratio
- Access to destinations/opportunity**
- Vehicle miles traveled (VMT) per capita**
- Person and goods throughput**
- Travel time reliability**
 - Travel time reliability
 - Travel time
- Congestion**
 - Travel speed
 - Duration (hours)
 - Queuing
 - Volume to capacity ratio

Revised Draft Mobility Policy Elements

in track changes to address stakeholder input

NEW

Equity

- Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other historically marginalized and underserved communities experience equitable mobility.

Access

- All People and ~~goods~~ businesses can conveniently and affordably reach the goods, services, places and opportunities ~~get where~~ they need to ~~thrive~~ go.

~~Time~~ Efficiency

- People and businesses efficiently use the public's investment in our transportation system to ~~goods can~~ get where they need to go in a reasonable amount of time.

Reliability

- People and businesses can count on the transportation system to get where they need to go reliably and in a reasonable amount of time. ~~Travel time is reliable or predictable for all modes.~~

Safety

- People are able to travel safely and comfortably, and feel welcome. ~~Available travel options are safe for all users.~~

~~Travel~~ Options

- People and businesses can choose from ~~can get where they need to go by~~ a variety of seamless and well-connected travel ~~options~~ or modes and services that easily get them where they need to go.

6/30/21

Regional Mobility Policy Update

Potential Mobility Performance Measures Recommended for Testing – Descriptions

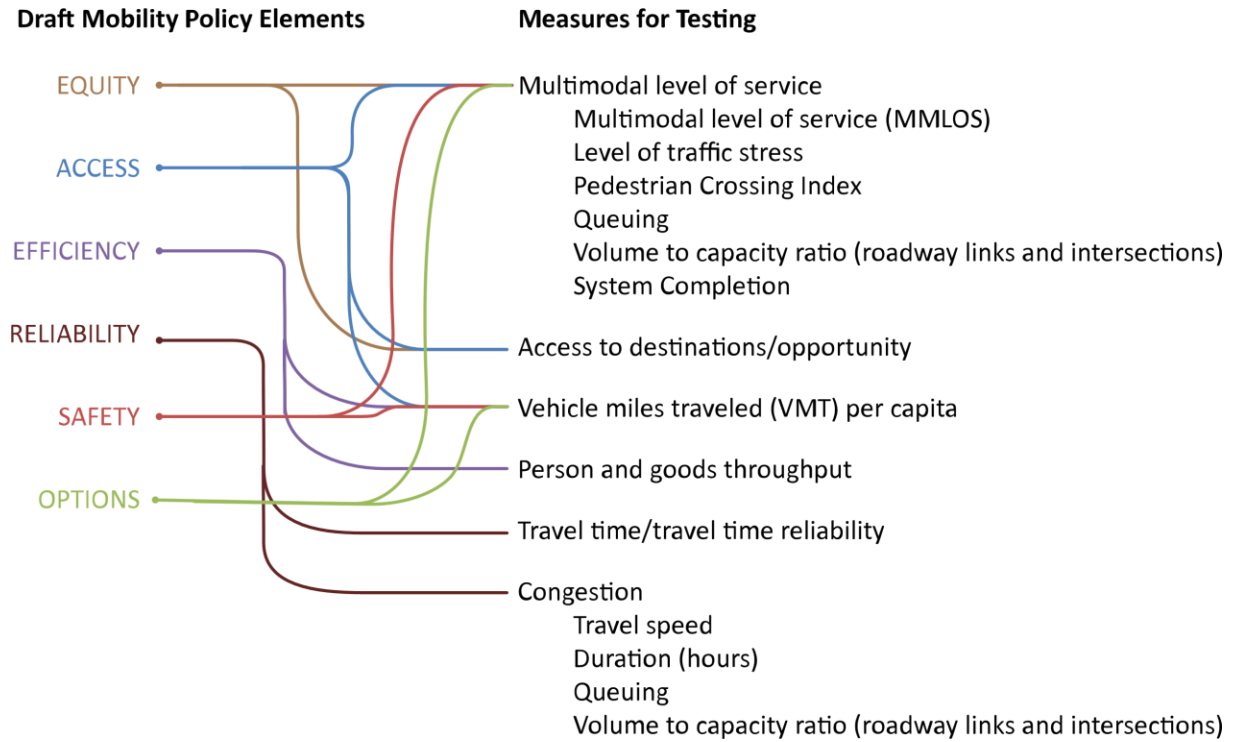
Measures are listed alphabetically. As a group, the measures cover all modes. Most measures relate to more than one mobility policy element and can be used for both system planning and plan amendments, the focus of the regional mobility policy update. Specific definitions, thresholds and methods for each potential measure will be developed and tested through the case studies research.

Measure	Description	Modes
Access to destinations/opportunity	An aggregate measure of the ease by which a person can reach destinations, inclusive of all travel modes.	All modes
Duration of congestion	The number of hours within a time period, most often within a weekday, where a facility's congestion target is exceeded.	Vehicle, Freight, Transit
Level of Traffic Stress (LTS)	Level of traffic stress (LTS) classifies points and segments on routes into different categories of stress ranging from 1 (low stress) to 4 (high stress) based on factors that correlate to the comfort and safety of the bicyclist or pedestrian using that facility.	Bike, Pedestrian
Multimodal Level of Service (MMLOS)	MMLOS is an integrated level of service (LOS) system that measures the quality and level of comfort of urban streets per mode based on factors that impact mobility from the perspectives of pedestrians, cyclists, transit riders and auto drivers, respectively.	All modes
Pedestrian crossing index	The distance between pedestrian crossings compared to a target maximum distance.	Pedestrian
Person and goods throughput	The number of people or amount of goods, across modes, traveling through a segment, facility, or specified point in one direction over a specified time period.	All modes
Queuing	The extent of vehicles queued on intersection approach lanes, including on and off ramps, during a specified analysis period.	Vehicle, Freight
System completeness	The percent of planned facilities that are built within a specified network.	All modes
Travel speed	Average or a percentile speed for a network segment or between key origin-destination pairs, during a specific time period.	Vehicle, Freight, Transit
Travel time	Average or a percentile time spent traveling between key origin-destination pairs, during a specific time period.	All modes
Travel Time Reliability (TTR)	Indicators of congestion severity that assess on-time arrival and travel time variability.	Vehicle, Freight, Transit
Vehicle miles traveled per capita	The number of miles traveled by motorists within a study area, per the study area's population.	Vehicle, Freight, Transit
Volume-to-capacity ratio (V/C)	The ratio of motor vehicle volume to the motor vehicle capacity of a roadway link or an Intersection during a specified analysis period.	Vehicle, Freight

Note: The case studies will develop and test different methods and targets/standards for each potential measure for different land use and transportation contexts in selected case study locations.

Regional Mobility Policy Update

Relationship Between Elements of Mobility and Potential Mobility Performance Measures



Attachment 3: Criteria for Evaluating Potential Mobility Measures in Case Studies

Technical feasibility and clarity

Are the performance measures reasonably simple to analyze?

Are they easy for both the public and practitioners to understand?

Do they rely on readily available data and a proven analysis process?

Flexibility for intended applications and different contexts

•Can it be focused on people, goods, or both?

Can it be distinguished for different facility types such as throughways vs arterials?

Can it consider land use context?

Can it be used for one or all intended applications (system planning, plan amendments, and development review)?

Can it be used at different scales to compare scenarios or alternatives?.

Legal defensibility

•Are the measures legally defensible with respect to legal mandates from the State of Oregon over the past 20 years?

Can they document incremental changes or impacts and be compared to a standard?

Measure already in use

•Is the measure(s) in use by other states, MPOs and/or jurisdictions?

Is the measure already in use by ODOT?

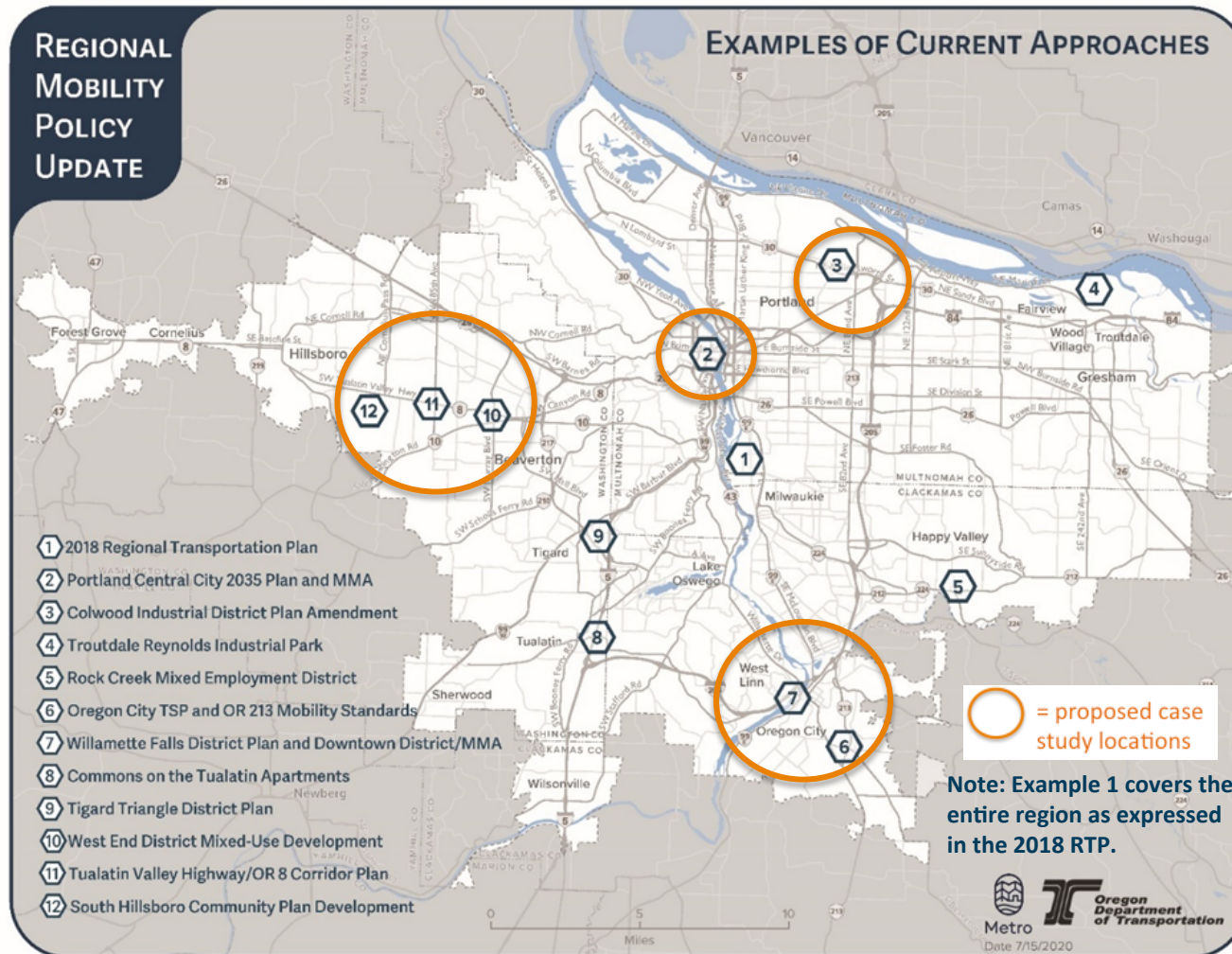
Is the measure already in use by Metro?

Ability to impact outcome/show progress

•Does the measure provide a link between the mobility policy and the outcomes demonstrated by the performance measures?

Are ODOT, Metro and local agencies (alone or working collectively toward the regional goals) able to impact these outcomes?

Case studies to test mobility measures



- Tualatin Valley Highway area
- Downtown Portland area
- Middle Columbia Corridor Industrial area
- Oregon City area

Information about all twelve available on the project website

oregonmetro.gov/mobility



REGIONAL MOBILITY POLICY UPDATE

Stakeholder Engagement Report

A summary of engagement activities conducted in Spring 2021 by Metro and the Oregon Department of Transportation (ODOT) in support of updating the mobility policy for the Portland region

June 2021

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance.

If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit www.oregonmetro.gov/civilrights or call 503-797-1536.

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

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

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

Project website: www.oregonmetro.gov/mobility

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

TABLE OF CONTENTS

Executive Summary	1
• Introduction	1
• Key themes from stakeholder input	2
• Next steps	3
Stakeholder forums.....	4
• Stakeholder forums key themes.....	4
• Practitioner forums summary.....	5
• Practitioner forum #1 summary	5
• Freight and goods forum summary	14
• Practitioners forum #2 summary.....	16
• Community leaders forum summary.....	21
County coordinating and advisory committee meetings summary.....	24
• County coordinating and advisory committee meetings key themes.....	24
• Metro Council, Metro Policy Advisory Committee (MPAC) and Joint Policy Advisory Committee on Transportation (JPACT)	25
Appendices (under separate cover)	
• Appendix A: Engagement schedule for spring 2021.....	A-1
• Appendix B: Stakeholder forums	B-1
○ Stakeholder forums registration lists	
○ Stakeholder forum presentation	
○ Practitioners Forum #1: April 21, 2021	
○ Freight & Goods Forum: April 23, 2021	
○ Practitioners Forum #2: April 30, 2021	
○ Community Leaders Forum: May 14, 2021	
• Appendix C: County Coordinating Committees and TransPort Meeting Notes.....	C1
○ TransPort: April 14, 2021	
○ Clackamas County Transportation Advisory Committee: April 27, 2021	
○ East Multnomah County Transportation Committee: May 5, 2021	
○ Washington County Coordinating Committee TAC Briefing: May 6, 2021	
○ East Multnomah County Transportation Committee (policy): May 17, 2021	
○ Clackamas County C-4 Metro Subcommittee (policy): May 19, 2021	
○ Washington County Coordinating Committee (policy): June 14, 2021	

This page intentionally left blank.

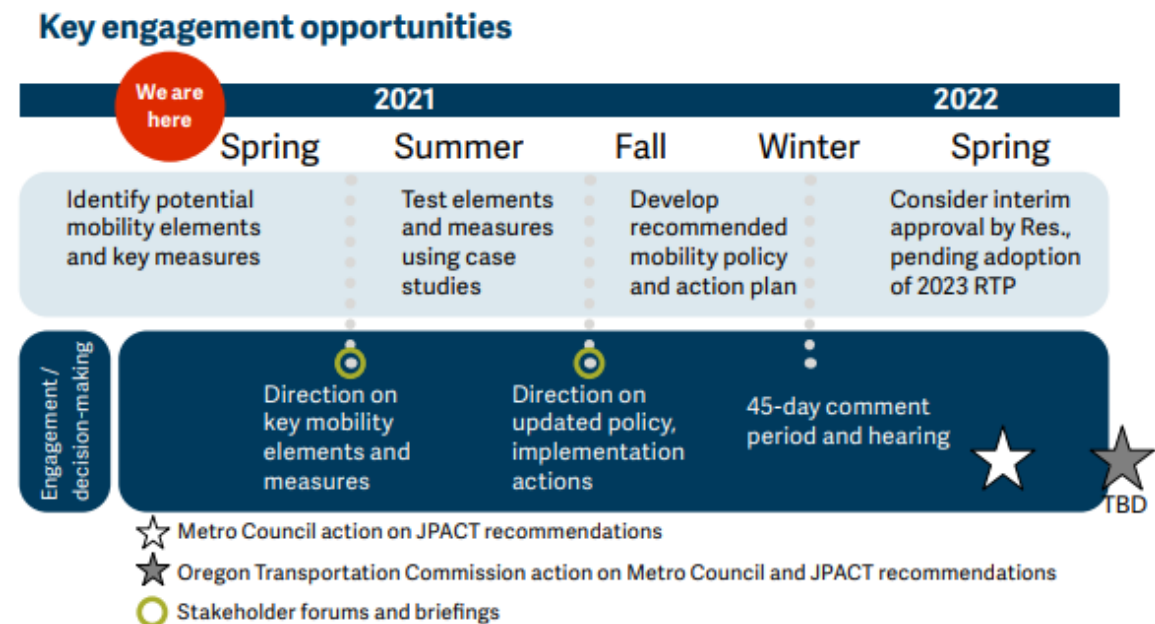
EXECUTIVE SUMMARY

Introduction

Metro and the Oregon Department of Transportation are working to update how mobility is defined and measured in greater Portland. The regional mobility policy update is focused on how mobility is defined and measured in the Regional Transportation Plan (RTP) and local transportation system plans (TSPs), and during local comprehensive plan amendment processes in the Portland area.

In spring 2021, the project team engaged policymakers, practitioners, community leaders and other stakeholders to help shape the proposed elements and measures to include in the updated policy. The draft policy elements and measures that were shared for feedback were informed by input from recent transportation planning efforts and the Regional Mobility Policy update scoping processes as well as feedback from two workshops with the Transportation Policy Alternatives Committee (TPAC) and Metro Technical Advisory Committee (MTAC) in 2020.

Regional mobility policy engagement timeline



Throughout May and June, the project team engaged stakeholders through online forums and committee meetings. The engagement activities included four online facilitated forums, including two forums for planning and engineering practitioners, a forum for goods and freight professionals, and a forum for community leaders. A total of about 130 people (not including the project team and facilitators) participated in the forums. Project staff also presented and received feedback at County Coordinating Committees (staff and policy), MTAC, TPAC, the Metro Policy Advisory Committee (MPAC), the Joint Policy Advisory

Committee on Transportation (JPACT) and the Metro Council. All forums and meetings are listed in Appendix A.

Stakeholders provided feedback on the following potential regional mobility policy elements and measures:

Potential policy elements

- **Access** – All people and goods can get where they need to go.
- **Time Efficiency** – People and goods can get where they need to go in a reasonable amount of time.
- **Reliability** – Travel time is reliable or predictable for all modes.
- **Safety** – Available travel options are safe for all users.
- **Travel Options** – People can get where they need to go by a variety of travel options or modes.

Potential policy measures (narrowed from a list of 38 measures through a technical screening process)

- Multimodal Level of Service (MMLOS)
- Level of Traffic Stress (LTS)
- Pedestrian Crossing Index
- System Completeness
- Travel Speed
- Accessibility to Destinations
- Hours/Duration of Congestion
- Travel Time Reliability (Planning and Buffer Travel Time Indexes)
- Vehicle Miles Traveled per Capita
- Travel Time
- Volume-to-Capacity Ratio (V/C) for Roadway Links
- Volume-to-Capacity Ratio (V/C) at Intersections

Key themes from stakeholder input

There were several themes that emerged across multiple stakeholder groups, including:

Overall Policy

- Climate and equity need to be explicit in the updated mobility policy.
- Define mobility policy to be flexible and responsive to different contexts.

Policy Elements

- Concept of equitable mobility is missing. It is important to acknowledge our transportation system is inequitable due to past policy and investment decisions, particularly for BIPOC community members and other historically marginalized and underserved communities

- Improved accessibility and making it safe, easy and convenient for people and business to reach the goods, services and activities they need to thrive are important elements of mobility.
- Seamless connections between travel options are important to mobility.
- Well-connected, high quality networks for all modes are important to mobility.
- Many aspects of access are important to mobility:
 - Access to places
 - Access to travel options
 - Affordability is key to access
 - Amenities are important to access
- Efficient use of the existing transportation system is important to mobility. This policy should encourage best use of the right of way and the public's investment in the existing transportation system, such as using demand management and operations strategies to improve traffic flow and reduce drive alone trips.

Policy Measures

- Ensure measures are focused on people, not vehicles.
- Ensure all elements and modes are reflected across the measures.
- Avoid redundancy in the measures; combine measures when possible.
- Allow for different measures for different applications and contexts (land use and transportation functions), without being overly complex.
- Ensure legal nexus for system development charges and mitigation can be established.
- Top measures: access to destinations, travel time reliability and system completeness.

Next steps

Input from this engagement will be shared with regional decision-makers as they work together to recommend the mobility outcomes and potential measures to move forward to the next step in the process. Together, the technical screening process and stakeholder input will help shape staff's recommendation to JPACT and Metro Council on the key policy elements and measures to be further evaluated and tested through case studies.

In June, staff will report back on stakeholder feedback received on the elements and measures. In July, JPACT and the Metro Council will be asked to direct staff on the measures to be tested through case studies this summer.

In summer 2021, the project team will test the elements potential measures through case studies. Through the case studies, the team will evaluate which measures are most feasible and useful in measuring mobility.

In Fall 2021, staff will report the results of the case studies to stakeholders and decision-makers. Staff will continue to engage TPAC and MTAC in developing an updated regional mobility policy and action plan for public review and discussion in early 2022 by JPACT, MPAC and the Metro Council. This work will include crafting draft policy language and guidance related to use and applicability of the recommended performance measures.

STAKEHOLDER FORUMS

In April and May, Metro and ODOT hosted four forums to provide participants with an update on the Regional mobility policy update process receive input on potential policy elements and approaches to measuring mobility. Each of the forums was designed for a specific stakeholder group whose expertise and perspectives are important to shaping an updated mobility policy. A total of about 130 people (not including the project team and facilitators) participated in the forums. A fifth forum for housing and land development practitioners was planned and cancelled due to low enrollment. A couple of representatives from the development industry attended other forums. The project staff will reach out to housing and land developers along with other stakeholders again in fall 2021.

- Practitioners Forum 1 – 10:00 AM to 12:00 PM, April 21, 2021
- Freight and Goods Forum – 9:00 AM to 11:00 AM, April 23, 2021
- Practitioners Forum 2 – 9:00 AM to 11:00 AM, April 30, 2021
- Community Leaders Forum – 9:00 AM to 11:00 AM, May 14, 2021

All forums were held using the Zoom online meeting platform. The forum formats varied slightly from group to group. All forums included:

1. Introductions and Workshop Purpose
2. Regional Mobility Policy Update & Policy Elements Presentation (PowerPoints are included in Appendices).
3. Facilitated Small Group Breakouts: Policy Elements and policy measures.
4. Overall Reflections
5. Next Steps and Close

Stakeholder forums key themes

Across all of the forums, there were a number of key themes that were highlighted in multiple discussions.

- There are critical missing elements that need to be explicit in the policy, including: equity and climate action.
- The policy needs to be flexible to allow variance based on jurisdictional needs and codes.

- Avoid redundancy in the measures. Travel speed, travel time reliability, and travel time need to be explored with intention of finding ways to consolidate these measures and reduce complicating the policy.
- Access is a very important part of mobility and needs to consider how it can be applied for all modes and in all jurisdictions through the policy.
- Multimodal Level of Service (MMLoS) needs to take into account all modes of transportation.
- MMLoS is an outcome, that is difficult to measure.
- Freight relies on connectivity between freight modes not included in the policy, i.e., rail, air travel, marine ports, etc.

Practitioner forums summary

For the practitioner forums, participants were placed in groups based on their focus of work. This summary reports input organized by the focus areas. These practitioner groups included:

- Development review/current planning
- Plan amendments
- Transportation engineering
- Transportation modeling/operations
- Transportation system planning

Practitioner forum #1 summary

On April 21, 2021 Metro and ODOT met with practitioners from within the Portland area to discuss the Regional Mobility Policy elements and measures. Including project staff, a total of 76 people registered for the first practitioner forum, 50 of the participants identified themselves as city, county, or state agency employees, 11 identified as consultants or employees of a private agency, two identified as employees of a non-profit, and ten selected the option “other” to explain their affiliation. (See Appendix B for the registration list.)

Highlights from the polls, small group discussions, and large group discussions are summarized as follows. Discussion notes are included in the Appendix B.

Poll Question 1: Do these feel like the right elements for the updated policy?

The 51 participants in the first poll question were split between answering “yes” and “unsure.” A total of 26 answered “yes” and 23 answered “unsure.” Only two people that participated in the poll answered “no” to this question.

Practitioners forum #1 policy elements small group discussions

The groups were asked to discuss the different policy elements, specifically regarding whether they were the right elements to include in the policy and if anything were missing.

Development Review and Current Planning Discussion Summary

- It's important that there is consistency in the elements across jurisdictions.
- Climate action is missing from the policy elements.
- The definition of mobility needs to be responsive to the needs of different areas in the region.
- Developers have concerns about how much is required of them in terms of right-of-way (ROW).

Plan Amendments Discussion Summary

- Consider innovation and emerging technology and services in the elements.
- The elements will naturally hold different value depending on the community and individuals. This will impact the motivations of those making planning and investment decisions. Consider incentivization to help meet the goals of the policy.
- Efforts to advance racial equity and address the mobility needs of underserved communities needs to be explicit in the elements.
- Connect the policy and the reduction of greenhouse gases to help meet climate goals.
- Incorporate the need for equitable access to destinations.
- "Place" needs to be preserved. Protect destinations from potential negative community impacts of transportation investments.
- Ensure the needs of school-age youth and seniors are addressed in the policy.
- Prioritize the need for reducing vehicle trips and trip length.
- Consider including growth in the policy.

Transportation Engineering Discussion Summary

- It's important to consider how the policy is applied to allow necessary flexibility to accomplish the goals of the region.
- Has ODOT successfully used their suite of measures in transportation system plans (TSPs)?
- Consider working with a consultant team to dig through the issues of the policy.
- Seek examples of other cities that have successfully implemented mobility policies.

Transportation Modeling and Operations Discussion Summary

- Consider affordability in terms of choice of transportation mode and how limited options impact mobility.
 - Affordability may be a part of the "access" element.
- Investing in reliability is cheaper than investing in efficiency and more proactive than investing in volume-to-capacity (v/c).
- Freight lacks flexibility in terms of mode options.

- Is equity an umbrella policy or is there a distinct equity category in the measures?
- How is environmental equity considered in the policy?
- Access and reliability are key elements.
- Consider how a person could find the bus a more rewarding way to travel and capitalize on why a user would choose the bus over another mode of transportation.

Transportation Planning Discussion Summary

- Ensure the policy is responsive to how various demographics use the transportation system – race, income, disability, age, gender identity, etc.
 - People with disabilities and seniors have unique issues traveling on certain types of public transit.
- Equity needs to be explicitly defined in the elements or included as a separate category.
- It's important to consider ways to reduce carbon emissions through the elements of the policy. Include carbon emission reduction as a separate element.
 - There is a need to be responsive to the community in terms of their vocal desire for climate action.
- Access needs to be explicitly called out in the policy.
 - Access is not equivalent to accessibility.
 - Mobility is inherently defined by access to destinations and options for travel.
 - “Need” is subjective in terms of access to destinations.
 - Mobility needs vary by person based on demographics. The mobility needs of a young person are different than the mobility needs of a senior. In addition, the current transportation system is inequitable – for some people, driving a vehicle is their only viable option.
 - Access is specifically about access to the system, not about access to destinations. Prioritize network/system quality and connection.
 - Consider access in terms of jobs and housing.
 - How does remote work impact need for access to destinations?
- Consider how land use impacts the purpose of a facility and its connection to equity.
- Consider including an element that addresses system efficiency.
 - Replace “time efficiency” with “system efficiency” with an intentional focus on spatial considerations and efficient use of the public’s investment in the transportation system.
- Reliability is a critical component of mobility. People and goods need to travel with confidence in the time it takes to get from their location to their destination day-to-day.
- The mobility policy needs to consider ALL modes.
- Consider how to move travel away from peak hours to improve mobility.

- It's important to consider that future mobility may be focused more on delivery of goods to where people are.
- Integrate the desire for personal mobility and freedom to travel without excessive interference into the policy.
- Revise the definition of mobility to make it more applicable to how practitioners use the term.
- The policy needs to consider how people and goods will be moved as innovation is implemented into the transportation system. This includes non-traditional modes of delivery.
 - Build the policy in a way that can inspire how other cities develop and integrate climate and mobility policy.
- Consider ways to incorporate economic drivers into the policy without impacts to the accessibility of travel options throughout the region.
- Prioritize mobility options that are less expensive than owning a personal vehicle. This will have an economic benefit.

Practitioners forum #1 policy measures small group discussions

Development Review and Current Planning Discussion Summary

Multimodal Level of Service (MMLOS)

- This measure has the potential to help justify why mitigation is required.
- How will the dichotomy between pedestrian density/infrastructure quality and pedestrian safety and comfort be addressed?

Group members were asked that outcomes they would like to see as a result of the update. Responses are summarized below:

- The system will better support bike and pedestrian users.
- Explore how to use the policy to help guide where development takes place.
 - Public transit and other transportation amenities should be able to be purchased by developers for their properties.
- Measures need to have the flexibility to be applied at different scales across the region.

Plan Amendments Discussion Summary

Multimodal Level of Service (MMLOS)

- It's important to allow flexibility in how modes are measured, e.g., crowded sidewalks are not as much of an issue.
- Determine a method for collecting and measuring person-trip data.
- Include all modes in the MMLOS measurements.

- Consider methods for reconciling what is needed to address flexibility and labor needed to accomplish flexibility.
- Incorporate the comfort and appeal of travel in the system.

System Completeness

- A data collection method is needed to accomplish this measure.
- There are links to system development charges (SDCs) and development fees.
- Areas with vulnerable populations often lack the facilities to support new housing development. This has the potential to create a bias against these investments.

Access to Destinations

- This measurement can assist in revealing equity issues related to mobility.
- Access to destinations is inherently connected to land use. How can this be used to encourage and support the development of “20-minute-neighborhoods?”
- This measure can benefit land use when applied to plan amendments.
- Prioritize access for communities that have historically lacked access to important destinations.
- Land use needs to consider the houseless/homeless population and the changing nature of where they locate themselves.
- Time-of-day is an important element to consider for accessibility.
- Consider prioritizing existing mobility access issues rather than trying to forecast and plan/forecast future issues.
- Safety needs to be incorporated into this measure.

Vehicle Miles Traveled (VMT) per capita

- Use this measure to determine whether the system is improving.
- VMT can help demonstrate the overall impact/efficiency of the system and efficient land use – if destinations are closer together then trip lengths and the need for auto travel for daily trips is reduced.
- Consider using this measure as a proxy for climate and greenhouse gas emissions.
 - Ensure electric vehicles are included in this metric.

Transportation Engineering Discussion Summary

Level of Traffic Stress (LTS)

- How would this be applied in development review?

System Completeness

- Consider the various needs of different jurisdictions when applying this measure – some areas in the region have limited travel options available.

- It will be important to determine and factor in where trips are coming from and how to define those trips.
- This measure may be better defined as accessibility for desired modes, i.e., sidewalk completion, bike facilities, etc. in the nearby transportation system.
- Does “completeness” include vehicular capacity expansion?
- Will each mode be considered separately?
- This has the potential to be difficult to evaluate considering the various jurisdictions and plans that could govern what “completeness” means.

Travel Speed

- This seems ambiguous. Consider taking this from a mobility perspective, but not from a safety perspective.

Hours/Duration of Congestion

- Is this similar to Travel Time Reliability?

Volume to Capacity (V/C) at Intersections

- V/C is commonly limited by intersections.

Other key points that arose during the transportation engineering conversation include:

- Local TSPs may be outdated and therefore not responsive to the measures being considered for the updated policy.
- Most of the measures included have not been considered at a local level.
- There are existing difficulties for developers related to offsite improvements.
- Consider combining Travel Time and Travel Time Reliability into one measure. It doesn't seem like there is a need for both measures.
- Is there a critical need for V/C roadway links vs. V/C at intersections when evaluating a system?
- All the measures seem right, but it may be difficult to apply them.

Transportation Modeling and Operations Discussion Summary

Multimodal Level of Service (MMLOS)

- MMLOS needs to consider all modes and serve system completeness.

System Completeness

- Can this measure be used to identify future capital projects?
- System completeness seems more like an outcome or goal, rather than a measure.
- This measure does not adequately help inform assessment and prioritization of needs.

Access to Destinations

- Diverse land uses support access in a multimodal system.
- Consider including an access to opportunity index.

Travel Time Reliability

- Reliable has the potential for meaning “reliably bad.”

Travel Time

- Prioritize reliability of transportation over speed.
- If travel time is included as a measure, it needs to include language about safety.

Other key points that arose during the group’s conversation include:

- What measures were screened out during Phase 1?
- What hours have the most congestion?
- Make equity an encompassing component of the policy to help inform and implement equitable investments.
- Consult Vision Zero on how to improve safety in the policy.
- There is a lot of redundancy in the policy elements.
- Equity needs to be prioritized in both projects and investments.
- The policy would benefit from a public health perspective.

Transportation Planning Discussion Summary

Multimodal Level of Service (MMLOS)

- MMLOS needs to explicitly consider all modes of transportation and types of travel.
 - Pedestrian mobility needs to be prioritized, however, streetscape and MMLOS should not be conflated.
- MMLOS is an outcome while the other measures are quantifiable and used to reach the goal of MMLOS.
- How does this measure connect to ODOT? Provide more clarity in this definition.
- Consider a variety of options for guiding the calculation method for MMLOS.
 - Transportation Review Board and the National Association of City Transportation Officials
 - I-5 Value Pricing/Tolling Project
 - Level of Traffic Sense (LTS)
- Consider how emerging technology and innovation may impact pedestrian mobility.
- Inform the measure based on the level of comfort for each mode.

- Basing the measurements on the number of people using a mode will tip the scale towards an auto-centric system.
- The need for access to destinations is subjective.
- Define what is being measured.
- Ensure the MMLOS measure is not too focused on single-occupancy vehicles (SOV).
- The MMLOS measurement seems more effective for the local street systems and seems ineffective at addressing the issues impacting freeways.
 - The freeway system often impacts transportation in local communities.
- Consider how parking and right-of-way (ROW) are connected to the MMLOS.

Level of Traffic Stress (LTS)

- This measure will be helpful in creating a complete network.
- It's important to ensure the LTS measure considers safety.
- Provide examples of jurisdictions that have used legal defensibility.
- Bike and pedestrian infrastructure needs to be developed in a way that incentivizes use.
- It's crucial to include bike and pedestrian in LTS measurements.
- How will emerging technologies and innovation being included in LTS measurements?
- The ODOT Analysis Procedures Manual provides considerations for the context in which facilities are located.
- This measure shifts the metrics towards prioritizing people over vehicles.
- The results of this measure are easily presented on a map.

Access to Destinations

- Track the safety of transportation to and from schools and daycares including after hours of operation.
 - Consider the link between childcare and improving the economy.
- Include how newer technology is impacting access, i.e., bike share, electric scooters, etc.
- It's important to link the distribution networks and our local transportation system.
- Consider how destinations and need for access to destinations changes over time.
 - Access is linked to efficiency.

Vehicle Miles Traveled (VMT)

- Determine how to use this measure both at a local and system-wide level.
- VMT does not have an effective way to capture bike and pedestrian travel.
- It's important to ensure this measure accounts for the entire region and is not just applied at a local level.

- Addressing VMT is critical to climate action.
- Plan a transportation system that reduces the need for people to travel using single-occupancy vehicles (SOV).
- This measure is critical and needs to be included in the policy.

Travel Time

- Time is an important component for all transportation modes.
- Consider the connection between travel time and reliability.
- There is an inherent connection between land use and travel time.
- Travel time metrics need to be applied to public transit.
- Speed of travel can be difficult to address because of how it relates to safety.
- Capture the disparity of travel time between modes as it relates to speed.
- Throughput is a critical component of travel time.
- Seek ways to make transit a competitive option.
- Consider the inevitable shift of need for accessibility to different locations. Allow jurisdictions to develop local plans that address travel time in ways specific to their needs.

Volume to Capacity (V/C) for Roadway Links

- V/C is not enough to measure mobility without using other metrics.

Participants in this group discussed which measures they felt could be removed or need to be modified. These measures and reasoning are summarized as follows:

- Travel Speed – this has the potential to encourage higher speed of travel on the road.
- Travel Time – reliability is more important. Time and volume to capacity (v/c) are becoming more obsolete.
 - Another member responded: *Travel time is a key measure because users expect the transportation system to support regional travel and remove barriers to travelling throughout the region.*

Poll Question 2: What are your top three measures from the list we covered?

Participants were asked to select the top three measures they would like included in the Regional Mobility Policy. There were 45 people that participated in the second poll question, 25 selected Travel Time Reliability, 22 selected Access to Destinations, and 19 selected Complete Streets. All other measures received less than 15 votes.

Freight and goods forum summary

On April 23, 2021 Metro and ODOT met with representatives of the freight and goods industry within the Portland area to discuss the Regional Mobility Policy elements and measures. Including project staff, a total of 31 people registered for the freights and goods forum. (See Appendix B for the registration list.)

Participants at this meeting were broken into two groups and did not have a specific area of interest or specialty guiding their discussion. The summaries of the small group discussions have been combined. Highlights from the discussions are summarized as follows. Discussion notes are included in the Appendix B.

Freight and goods policy Elements Small Group Discussions

The freight groups provided very detailed comments.

- How will other modes of transportation be incorporated into the policy? i.e., air travel, rail, etc.
- Reliability is highly important for serving intermodal and freight needs.
- Consider the impacts that extend beyond the freight corridor but are directly impacted by the ability for freight to move efficiently, specifically e-commerce.
- It's important to include climate and air quality language and direction in the policy.
 - Residential areas may be impacted by increased emissions due to e-commerce.
- Small businesses cannot always pay for the technology upgrades that would reduce climate impact.
- Corporations in the region can influence and force practices to change and have impacts on the regional systems.
- Construction has a significant impact on freight access.
- The list is missing key components like equity, safety, public health, environment, and community vibrancy.
- Reduced vehicle capacity will have a negative impact on freight.
- Freight needs wider highways and freeways to support freight mobility.
- Travel time and efficiency are key components of improving freight mobility.
- Available parking is critical for deliveries.
- Freight needs easy connections to and from the freeway.
- Truck drivers need designated parking for them to rest.
- Capacity planning needs to prioritize efficiency for freight.
- Lack of space for trucks creates safety issues.
- Create a freight-only lane on freeways.

- The policy needs to reflect the complex nature of the freight industry. Modify the language to ensure the nuance is captured.
- Freight isn't singular, there is a diverse and varied nature to the industry.
- Accessibility is needed for freight. Trucks need access to all types of roads.
- Time of day is dependent of freight customers.
- Mixed-use centers need to consider access for delivery trucks.

Freight and goods policy measures small group discussions

Level of Traffic Stress (LTS)

- Consider the stress impact for trucks that share lanes with bikes.
- Consider performing a technical analysis of freight LTS.
- LTS could be reduced by mandates that incentivize businesses implementing electric vehicle chargers and electric vehicle carshare parking.
- This has different implications for freight, especially in terms of safety for the driver, vehicle, and other street users.

System Completeness

- Improve the definition by clarifying what “planned facilities” are.

Access to Destinations

- The Gateway district can serve as an example of the ideal accessibility for freight parking and access to destinations.
- Daily access needs vary from user to user. The policy needs to be responsive to those variations.
- Access is crucial for all road users, especially businesses, employers, and employees.
- Tracking access to destinations will mean different things to different people.

Travel Time Reliability

- It's important to consider freight travel hours.
- Consider locating origin facilities in neighborhoods based on zip code to improve predictability. Smaller distribution centers could increase efficiency.
- Consider linking access to destinations and access to origins for freight.
- If a system is unreliable, there may be a need to split loads into two trucks to deal with the variable travel times.
- Unpredictability on arterials and highways in more localized areas is important to consider.

Participants provided feedback that did not fall within the potential elements, summarized below.

- It's important to consider what innovation in the freight industry will require, i.e., power stations, capital investments, long-term planning investments, etc.

Practitioners forum #2 summary

Including project staff, a total of 69 people registered for the second practitioner forum, 45 of the participants identified themselves as city, county, or state agency employees, 10 identified as consultants or employees of a private agency, three identified as employees of a non-profit, two identified as employees of a federal agency, one identified as an employee of a transit agency, and eight selected the option "other" to explain their affiliation.

Practitioners forum #2 policy elements small group discussions

Development Review and Current Planning Discussion Summary

- Provide context of how we got to these policy elements is necessary.
- The volume to capacity ratio is calculated differently at the regional and local levels due to differences in the analysis tools being used. The regional level analysis uses the regional travel demand model while the analysis conducted for development review uses finer-grained analysis tools. Consider differentiating standards as they are calculated differently.
- There is a disconnect between long-range planning and how it get is implemented through transportation system and development plans.
- How are the elements applied at a local level?
- Travel options need to be applied using an equity lens.
- Connect the elements to other policy areas, specifically land use and housing. Each jurisdiction has different ways of applying the policy areas.
- Equity needs to be a critical component of the policy elements and implementation of the updated policy.
- Climate needs to be included as a policy element.
- Identify parts of the policy that jurisdictions can adopt into their code.

Plan Amendments Discussion Summary

- There is interest in determining how the technical aspects of this project will impact master planning, comprehensive planning, comprehensive planning, and urban growth boundary (UGB) planning going forward.
- How will the new criteria and definitions for mobility be applied to areas with expected growth?

- It's important to include considerations for safety and access, including access to goods to support businesses and restaurants.
- Include an overarching equity lens to address the issues related to access to travel options.
- Do not prioritize vehicles when developing transportation system designs.
- Address the issues of forced tradeoffs when developing transportation project, i.e., reduced travel time vs. safety improvements.
- The Home Builders Association (HBA) categorizes based on housing product.
- The definition of mobility needs to be more holistic and consider how and where vehicle mobility has higher importance in the balance of investment.

Transportation Engineering Discussion Summary

- Reliability is important for transportation system plans (TSPs) to incentivize use of other modes and improve safety.
- Measures need to include accessibility and network completion for all modes.
- It's important that the elements are simple and easily applied.
- Consider adding "travel options" as an element of the policy.

Transportation System Planning Discussion Summary

- It's important to consider how access is necessary for creating land use diversity.
- These elements need to take into account the context, including geography, location, and time-based traffic.
- Clarify whether there is a hierarchal framework for the different policy elements.
- Reliability is the most important element, but efficiency is critically linked, otherwise reliability can mean "reliably bad."
- Freight stakeholders have a vested interest in transportation system planning because of the inherent link to reliability and delivery of goods.
- The policy lacks an explicit reference to how mobility directly impacts livability and quality of life in neighborhoods.
- When thinking about how new elements apply to the mobility policy, V/C measure should still be included in the mix.
- Climate is not included enough, considering the impact that our transportation system has on it.
- This policy allows us to bring in the multimodal perspectives to mobility, which can help us find a good balance and better understand impacts.
- If travel options are provided, they must be viable, safe, and feasible.

- In understanding the practical applications of the measures, we want to address existing deficiencies in a manner that reduces existing disparities and inequities in the system.

Poll Question 1: Do these feel like the right elements for the updated policy?

A majority (20) of those that participated in the poll answered “yes,” and 11 answered “unsure.” Only one person answered “no.”

Practitioners forum #2 policy measures small group discussions

Development Review and Current Planning Discussion Summary

Access to Destinations

- There needs to be an equitable approach to all areas of the city, including suburbs.
- This is a good measure that gets to the crux of what we want to do, but we still need to figure out how to do it.
- It is important to determine what “essential destinations” are and whether that will change over time.
- If we identify climate and equity clearly in the policy it removes an ambiguity that grants the ability to avoid things we really want to achieve.

Pedestrian Crossing Index

- We need to define enhanced crossing based on the type of road.
- Just looking at distance creates too narrow of a focus, may be better to include quality, connectivity, ADA, etc.

Travel Time

- Travel time needs to consider all modes, not just freight or vehicle travel.
- Consider the financial impacts of time for individuals using transit, biking, or walking.
- Suburban areas need to receive more TriMet funding to reduce travel time for transit users and increase transit ridership.

Plan Amendments Discussion Summary

Comments submitted via this group were not identified by measure and were discussed in an overarching manner.

Level of Traffic Stress (LTS)

- Mixed-use developments benefit from access to parks and ability to walk to destinations.

Pedestrian Crossing Index

- This is an important component of the policy for improving safety.

System Completeness

- This is a fundamental and critical measure in creating a multimodal system.
- Focus measures on system completeness and modal options.

Access to Destinations

- Access to destinations is highly important to the Homebuilders Association (HBA) because it directly impacts where people choose to live.

Other comments submitted by the group include:

- It's important to consider how these measures vary.
- In order to have successful testing there should be no more than 12 measurements with the goal of a total of three to four metrics when the policy update is finalized.
- Freeway enhancements are inherently and historically focused on vehicle-focused enhancements.
- Volume to capacity (v/c) is not a useful measure in dense areas like downtown because congestion is expected. It's important to be able to apply different measures depending on the context of the area.
- Clarify and refine the definition of "accessibility" as it relates to localized areas vs. the region or city.
- V/c can be met by making collaborative decisions between land use and transportation.
- The v/c measure is important for system planning by creating links.

Transportation Engineering Discussion Summary

Multimodal Level of Service (MMLOS)

- While a very effective measure, the metrics for collecting MMLOS data are difficult to develop and have shared agreement around.
- Consider the standards for pedestrian crossings included in the vehicle miles traveled (VMT) per capita.

Other comments submitted by the group include:

- Travel Time and Travel Speed seem redundant and the importance of each may vary depending on whether it is being applied in an urban, suburban, or rural area.
- The policy could benefit from a measure for tracking public transit efficiency.

Transportation System Planning Discussion Summary

System Completeness

- This is directly related to livability. There needs to be intentional action to address deficits across the region.

Travel Speed

- Clarify whether this is intended to create faster speed limits, or whether it's about connectivity and reliability.

Access to Destinations

- The tools used for this are usually a travel demand model and may not accurately measure all modes of transportation. Clarify the definition to make it more useful for jurisdictions.
- Provide mobility that enables access to the community.
- Develop a standard for assessing this data.
- Measuring access to destinations requires both the travel demand model and GIS.
- People need consistent access to destinations.

Hours of Congestion/Duration of Congestion

- Bikes, pedestrians, and transit users do not experience the same congestion as those using vehicles.
- It's important that congestion isn't too difficult to calculate.
- Right-of-way is critical for addressing congestion. Reduce lengthy signals.

Travel Time Reliability

- Reliability is more important than the duration of congestion or travel time.

Vehicle Miles Traveled (VMT) Per Capita

- Urban, suburban, and rural areas experience congestion vs. VMT in different ways. It's important to take this into consideration to ensure the policy is responsive and accurate.
- VMT provides a more transparent and flexible way to measure pollution and how much and how far people are driving.

Participants in the Transportation System Planning small groups contributed feedback that was outside the potential measures, summarized as follows:

- The policy lacks definitive language about safety.
- Consider including a metric that measures vulnerability.
- Past transportation investments have contributed to the barriers to mobility.
- Prioritize investments and improvements that make the system more equitable, specifically for historically underserved communities.
- Safety for pedestrians needs to be a top consideration when developing the policy in order to reduce fatalities for those not protected by a vehicle.

- Coordinate planning with the Statewide Transportation System Plan (STIP) to address safety and equity issues.
- It's important to make the measures more human-centric.
- Highlight mode-split in the measures.
 - It's important to consider the pros and cons of mode-split before making decisions.

Poll Question 2: What are your top three measures from the list we covered?

Participants were asked to select the top three measures they would like included in the Regional Mobility Policy. There were 28 people that participated in the second poll question, 23 selected Access to Destinations, 17 selected Travel Time, and 16 selected Complete Streets. All other measures received 15 or less votes

Community leaders forum summary

Forum overview

On May 14, 2021, Metro hosted an online transportation forum for community leaders. Ten community leaders participated representing traditionally under-represented communities and environmental and multimodal interests. (See Appendix B for the registration list.) The forum included updates on several transportation policy and investment efforts underway at Metro:

- Investments in urban arterials presented by Councilor Gonzalez
- Regional congestion pricing study presented by project staff
- Regional mobility policy update presented by project staff

Project staff solicited feedback on potential mobility policy elements and measures through facilitated small group discussions. See Appendix B for the forum agenda and Regional mobility policy presentation. The results of the mobility policy related discussions are summarized in this document. Participants discussed the following questions.

- Do you have questions about the mobility policy elements or measures? Anything need clarification?
- Are these the most important elements to include in the updated mobility policy? Anything missing?
- Which elements are most important in these different contexts – centers, urban travel corridors, industrial areas and throughways?
- Do any of the measures stand out as being especially important to measuring mobility? Anything missing?

Key themes from community leader input

- The policy needs to be multimodal.
- Climate needs to be explicit in the updated mobility policy
- System connectivity/continuity needs to be considered; especially in suburban areas and between modes.
- Mobility should support the places and communities that we want to see by creating the conditions for desired land uses.
- Consider the impacts of transportation on the whole community.
- Climate and equity needs to be explicit in the updated mobility policy.

Summary of discussions

Policy elements

The comments are organized below by the element that was the primary focus of the comment/discussion. Many of the comments touched on multiple elements.

Time efficiency

- People in Washington County are traveling greater distances compared to people traveling in the City of Portland, so efficiency here seems like a tricky measure.
- Time efficiency in multi-modal transportation (transit, micro-mobility, bike, walking) matters for encouraging their use. They need to be viable.
- We tend to prioritize vehicle efficiency and movement, but there isn't the same for pedestrian movement, active transportation.

Safety

- Are there tradeoffs between safety and other outcomes/elements? What is the acceptable level of risk? Are we talking about fatalities and injuries or property damage?

Reliability

- Suburban and rural trips – transit needs to be reliable/frequent to achieve climate goals. One person on an hourly bus doesn't help.

Missing elements

In addition to providing input to refine the draft elements, community leaders highlighted ideas they felt were missing from the elements.

- Appreciate this work but it is still anchored in the status quo. This is an opportunity to reframe how we talk about transportation and its impact on the whole community.
- Transportation conversations tend to focus on users. The impacts of the transportation system and how it is used affects everyone (social impact). Transportation should benefit the community and state (not just the individual user). The single-occupancy vehicle trip is the “most anti-social choice.” Need a hierarchy that prioritizes the most “pro-social” modes.

- Affordability is missing as an element. Cars may be more time efficient, but how do they impact people's budgets?

Climate

- Climate impacts seem to be missing.
- Need to consider unintended consequences of improving reliability. There could be unintended climate impacts-need to find a balance.

Land use

- Missing place-making as an element. Mobility policy should support communities/places.
- Land use context matters. Housing and businesses.
- Current vs. desired future land uses. This policy needs to contribute to the conditions for the desired future.
- It is important to remember people live along urban arterials; we are really talking about people's homes. There are a lot of mixed income residential communities living along these arterials.
- We need to address safety, but not only in the context of traffic violence. Recognize all that concrete means greater impacts to heat island; impervious cover related to rainwater; also noting the disparities people who live along the corridors and how their safety related to having cleaner air, open space, impacts of extreme weather, how that affects their safety and health.

Connections

- There isn't as much continuity when you travel by any other mode aside from a vehicle. There's a lack of sidewalk continuity so a person walking needs to zigzag; when riding transit people have to do a lot of trip chaining and transferring to get where you need to go
- First-and-last mile is so critical to the success of travel options and make it viable; the MAX is a spine; considering this as a connectivity issue; also look at connectivity not to the urban centers.
- What about a suburban context with poor connectivity? It seems missing.
- What about collectors in suburban areas? A lot of traffic diverts off of arterials to collectors. This matters for SRTS, access to parks, etc.
- Not sure why some elements would be more important in some contexts and not others. All the elements seem important in all the contexts.

Measures

- Travel speed seems more car related. Time related measures need to be specific to different modes; we don't want to set the bar relative to vehicles
- As more people use different modes, more amenities (such as a safe place to park a bike, nicer transit stops with shelter and lights) are needed. How do the amenities play into the people's use of multiple modes? Don't just focus on the park and ride; take the

barriers away like the questions of “where do I park my bike, charge my vehicle, etc.” to be able to make that trip by a different mode viable.

- Consider e-bike charging and recognize that some parts of the region are deserts for bike shops. From a transit perspective, there is a lot of focus on travel time, but reliability is more important. The focus on travel time isn’t getting at the system improvements needed, particularly for other modes and it skews towards vehicles.
- I want to see measures broken down by demographics and understand profiles of who and how they are getting around.
- Speed should not be a priority anywhere.

COUNTY COORDINATING AND ADVISORY COMMITTEE MEETINGS SUMMARY

Meetings overview

The project team briefed the county coordinating committees to answer questions about the mobility policy update and receive input on the potential policy elements and measures. The staff notes from each meeting are included in Appendix C.

- TransPort Subcommittee to TPAC (April 14, 2021)
- Clackamas County TAC (April 27, 2021)
- East Multnomah County Transportation Committee TAC (May 5, 2021)
- Washington County Coordinating Committee TAC (May 6, 2021)
- East Multnomah County Transportation Committee (policy) (May 17, 2021)
- Clackamas County C-4 subcommittee (policy) (May, 19 2021)
- Washington County Coordinating Committee (policy) (June 14, 2021)

County coordinating and advisory committee meetings key themes

- System completion and connectivity are important to mobility.
- It is important that the updated policy can continue to be used to make the case for nexus proportionality for System Development Charges and mitigation.
- Emissions and environmental impacts are missing.
- A number of comments pointed to the need for there to be different measures for different applications, including:
 - Planning uses where the mobility measures are applied. Arterials that serve as major connections are important to consider.
 - Land use contexts
 - Roadway applications

Metro Council, Metro Policy Advisory Committee (MPAC) and Joint Policy Advisory Committee on Transportation (JPACT)

Meetings overview

The project team presented and received feedback at a Metro Council work session (April 13, 2021), and meetings of JPACT (April 15, 2021) and MPAC (April 28, 2021). The notes for these meetings are captured in the meeting minutes on the Metro website (oregonmetro.legistar.com/Calendar.aspx).

Summary of Metro Council input

- The Metro Council wants to ensure the updated mobility policy better supports 2040 implementation and advances the Regional transportation plan priorities. Show how the updated policy relates to the regional priorities.
- Accessibility via density/diversity of destinations is very different than accessibility via speed/travel time. They are two very different types of access, and for different reasons. Also consider access on different roadway classifications and in different land use contexts.
- Efficiency policy element needs to be more than about time (but also include how efficiently the system is being used by people and goods). One idea is to measure energy efficiency or energy intensity of mobility in a corridor.
- Describe how we will evaluate/implement the policy and measures with a racial equity lens.
- Center work on achieving equitable mobility (not just evaluating whether policy and measures can measure benefits and impacts on equity focus areas). Does the policy (how it is implemented) improve equity? Is it addressing racial and economic disparities that people of color and other historically marginalized communities have/are experiencing?
- Similarly, does the policy (and how it is implemented) reduce carbon emissions? Improve safety? Manage congestion?

Summary of MPAC input

- There is an “in between” place missing from the three contexts that should be addressed – places like OR 43 – which serve as major travel routes between centers and are important transit corridors. They are different from throughways, often serve commuters and also connect to industrial areas and support transit.
- Expressed appreciation for the work. Broadly feel this is on-track – and seems to be good set of elements and measures to test.
- The more transparency documenting decisions, methods, etc. the better; it will also important to be transparent about how measures can be applied at different levels,

whether large or small scale, to make it useful to local governments when implementing the updated policy.

- Certain criteria make it more difficult to build support to acquire funding for projects that will result in a system that is viable and will accomplish their climate, safety, and equity goals.
- Emissions is missing as a policy element. Emissions is a way to show if meeting climate and equity goals, particularly from a public health perspective; should be reflected in elements to make it clear to the public that it is a priority.
- In terms of moving away from v/c – housing and 80% of infrastructure is built by private sector – development pays system development charges and for projects based on an nexus of proportionality – the outcome of this effort must be able to establish that nexus.
- How will autonomous and electric vehicles fit into this?

Summary of JPACT input

- Appreciation expressed that mobility is a major lens and goal for looking at transportation in the region.
- Concern with emphasis on congestion in the measures; congestion is a symptom (not a goal). Should focus be more on throughput in how we measure mobility.
- The number of vehicles on the road shows growth in the economy, but there are fewer emissions, and air quality has improved because of vehicle technology, indicating we are in a transition period from fossil fuels to electric and other means.
- Emissions are part of our key indicators and RTP priorities but are not reflected in these policy elements. Would like to see more of a focus on emissions.
- How is the region being thoughtful about emissions that disproportionately affect BIPOC communities? With more emissions in areas of POC, health impacts are important to consider.

This page intentionally left blank.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Stay in touch with news, stories and things to do.

oregonmetro.gov/news

Follow oregonmetro



Metro Council President

Lynn Peterson

Metro Councilors

Shirley Craddick, District 1

Christine Lewis, District 2

Councilor Gerritt Rosenthal, District 3

Juan Carlos Gonzalez, District 4

Councilor Mary Nolan, district 5

Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

June 22, 2021

**4.4 Regional Mobility Policy Update -
Recommendation to Test Potential Mobility Policy
Measures Through Case Studies
[Stakeholder Engagement Appendices](#)**

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

4.5 Consideration of the June 17, 2021 JPACT

Minutes *Consent Agenda*

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021



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

JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT)

Meeting Minutes

June 17, 2021

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Shirley Craddick (Chair)
Juan Carlos González
Christine Lewis
Jessica Vega Pederson
Nafisa Fai
Paul Savas
Jo Ann Hardesty
Travis Stovall
Steve Callaway
Kathy Hyzy
Rian Windsheimer
Sam Desue
Carley Francis
Anne McEnerney-Ogle

AFFILIATION

Metro Council
Metro Council
Metro Council
Multnomah County
Washington County
Clackamas County
City of Portland
Cities of Multnomah County
Cities of Washington County
Cities of Clackamas County
Oregon Department of Transportation
TriMet
Washington State Department of Transportation
City of Vancouver

MEMBERS EXCUSED

Curtis Robinhold
Nina DeConcini
Temple Lentz

AFFILIATION

Port of Portland
Oregon Department of Environmental Quality
Clark County

ALTERNATES PRESENT

Chris Ford
Jamie Kranz
JC Vannatta
Jef Dalin
Ty Stober

AFFILIATION

Oregon Department of Transportation
Cities of Multnomah County
TriMet
Cities of Washinton County
City of Vancouver

OTHERS PRESENT: Allison Boyd, Brian Monberg, Don Odermott, Eric Hesse, Erin Doyle, Glen Bolen, Grace Cho, Jean Biggs, Jeff Owen, Jennifer John, Julia Hajduk, Katherine Kelly, Kelsey Lewis, Jules Walters, Mike Bezner, Monica Tellez-Fowler, Sarah Iannarone, Shoshana Cohen, Will Farley

STAFF: Margi Bradway, Carrie MacLaren, Connor Ayers, Jaye Cromwell, Dan Kaempff, Kim Ellis, Kate Fagerholm, Ken Lobeck, Ramona Perrault, Ted Leybold, Tom Kloster, Caleb Winter, Matt Bihn, Tom Markgraf, Victor Sin.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

JPACT Chair Shirley Craddick called the virtual zoom meeting to order at 7:30 am.

Chair Craddick provided instructions on how to properly participate in the virtual meeting and called the role.

2. PUBLIC COMMUNICATION ON AGENDA ITEMS

Sorin Garber testified about the Sustainable Freight Strategy Initiative. He informed members of the history of the Strategy and how the intention is to make freight delivery more efficient. The Strategy promotes the use of non-petroleum-based vehicles and use of non-motorized vehicles to deliver goods. It also supports other strategies to reduce truck vehicle miles traveled.

3. UPDATES FROM THE CHAIR

Chair Craddick thanked members for completing the JPACT logistics survey and asked Metro Staff Jaye Cromwell to report on the results of the survey.

Ms. Cromwell reviewed the results of the survey which asked if JPACT members would be able to start the meeting earlier or later so that meetings would have more time.

Chair Craddick thanked Ms. Cromwell and informed members that JPACT would be meeting in August. She also informed members that as a part of Metro's responsibility to create the Metropolitan Transportation Improvement Plan, Metro Staff had developed a forecast of the amount of state and federal transportation revenue expected to come to the region over the next four years. She announced that JPACT Member Sam Desue had been selected as TriMet's new General Manager and congratulated him. JPACT members congratulated Mr. Desue in the chat.

Chair Craddick introduced Margi Bradway to read the names of those who died in traffic accidents within Clackamas, Multnomah, and Washington County.

Ms. Bradway shared the names and ages of victims during the month of May: Sergio Hunt, 17, Carl Vernon Holmes, 84, Jose Luis Mendez, 51, Janell Rene Butler, Martin

Ixquiactap-Tampriz, 41, Megan McComb, 32, David Dentler, 25, and four unknown persons.

4. **CONSENT AGENDA**

MOTION: Mayor Anne McEnerny-Ogle moved to approve the consent agenda. Commissioner Jo Ann Hardesty seconded the motion.

ACTION: With all in favor, motion passed.

5. **INFORMATION AND DISCUSSION ITEMS**

5.1 Regional Mobility Policy Update – Continue discussion of draft mobility policy elements and potential measures to test

Chair Craddick introduced Metro Staff Kim Ellis and ODOT Staff Glen Bolen to report on what they have heard through outreach on the update. They would also be seeking feedback from JPACT members.

Key elements of the presentation included:

Ms. Ellis reviewed the project purpose of updating the policy on how mobility is defined and measured in the region. She noted that mobility is currently defined through the volume to capacity ratio. At the end of the process the team will recommend amendments to the Regional Transportation Plan and the Oregon Highway Plan. She discussed the project timeline and where the team currently is in the project. She shared the priorities of both the 2018 RTP priorities and Oregon Transportation Commission Strategic Action Plan priorities. She reported the results from engagement done in the spring of 2021. Feedback included having equity and climate explicitly be a part of the updated mobility policy, ensuring different types of access, efficiency, and quality connections between travel options. She highlighted the proposed revised mobility elements and measures. She identified the areas where case studies have been proposed and concluded by giving an overview of what the next six months would look like during testing.

Member discussion included:

Chair Craddick noted that questions from Ms. Ellis were included in the materials sent to members and opened the discussion.

Commissioner Hardesty thanked Ms. Ellis and noted that the current policy focuses on moving vehicles rather than people and goods. She expressed a wish to see the work focused across multiple modes of transportation and recommended removing the auto focused measures and replacing them with measures more aligned with the region's goals.

Commissioner Paul Savas expressed appreciation for the changes that have already been made and asked how the transportation system meshes with economic aspects like jobs and economic development.

Ms. Ellis answered that the RTP update combines economic considerations along with many other regional priorities. This project is very focused on mobility while the RTP is much more comprehensive.

Commissioner Savas asked why both multi-modal level of service and volume to capacity measures were both included.

Ms. Ellis explained that they are trying to move away from looking exclusively at vehicles in transportation and focus more on other modes like walking and biking.

Councilor Hyzy noted that many downtowns are between major corridors, leading her to think about how to apply measures at transition points.

Mayor Steve Callaway noted that the region has disproportionately more congestion than others and expressed some concern about moving too far away from focusing on vehicles. He noted that congestion can lead to emissions that are bad for the environment and people living nearby. He expressed concern about legal challenges that could come with moving away from volume to capacity ratio.

Ms. Ellis clarified that they are trying to bring more modes of transportation into the picture along with vehicles.

ODOT Staff Lidwien Rahman added that legal standing is something that the team is aware of and considering.

Commissioner Hardesty agreed with Mayor Callaway and emphasized that they should be trying to give people more transportation options in non-traditional ways.

Commissioner Nafisa Fai asked for more detail about the community engagement and asked if it was possible to do more engagement around ordinary people using the

transportation system. She encouraged reaching out to communities that are not often engaged with.

Ms. Ellis suggested that the project team come up with some ideas for how to address engagement and bring it back to the group. She noted that early elements are based on previous projects like the RTP.

5.2 Regional Congestion Pricing Study Discussion

Chair Craddick introduced Metro Staff Alex Oreschak to present on the final results of the Regional Congestion Pricing Study.

Key elements of the presentation included:

Mr. Oreschak began by reviewing the questions that he would like to receive feedback on from JPACT members. He explained the goal of the study, which is to provide a foundational understanding of congestion pricing for policy makers. He gave an overview of the steps that have been taken so far. He shared the key takeaways from the Expert Review Panel. Mr. Oreschak reminded members of the key findings of the study before going over updates to those findings. He presented draft versions of recommended considerations and noted that they will be changed as comments are collected. Considerations are broken into ones for policy makers and ones for future owners/operators. He went through a list of these recommendations, which were included in the materials packet. He shared some comments that already been received on the recommended considerations. He concluded by sharing the next steps that will be taken and presenting questions that he would like feedback on from JPACT members.

Member discussion included:

In the chat Mr. Windsheimer expressed support for additional community outreach.

In the chat Mayor Callaway emphasized that one size does not fit all and recommended enough flexibility to ensure that jurisdictions with local control have options.

Commissioner Savas expressed concern for including aspects like parking and vehicle miles traveled under the umbrella of congestion pricing.

Ms. Bradway noted that the study was intended to be academic in nature as a way to compare different tools.

Commissioner Hardesty expressed concern that there is not enough communication between jurisdictions working on congestion pricing programs. She also emphasized

that she believes tolling and congestion pricing to be different. She recommended that JPACT have more conversations about congestion and moving people throughout the region.

Councilor Hyzy reiterated the need for more equity analysis. She recommended making sure that low-income households are included in the equity analysis. She asked for more understanding around revenue produced by each option while balancing a system that works. She also asked for more detail around diversion.

Councilor Lewis agreed with Councilor Lewis about diversion and noted that she would like to continue to see parking studied along with other tools.

Councilor Juan Carlos Gonzalez emphasized the need to understand where revenues go and the need to focus on low-income communities that have been marginalized.

Mayor Callaway agreed with Councilor Gonzalez about the need to focus on and take care of low-income community members.

In the chat Mr. Windsheimer asked for a continued dialogue between ODOT and Metro staff to address ODOT concerns. He agreed with Commissioner Hardesty about ensuring that different jurisdictions are well coordinated.

Commissioner Hardesty suggested including exemptions for low-income users in the chat.

5.3 TSMO Strategy – Vision and Goals

Chair Craddick introduced Metro Staff Caleb Winter and Fehr & Peers Staff Kara Hall to present on the Transportation System Management and Operation Strategy.

Mr. Winter thanked Chair Craddick and began by introducing the questions they would like feedback on from JPACT members. He explained that the purpose of TSMO is to make the most of what the region has in order to make transportation more efficient. He shared how the program was using an equity focus with the TSMO Equity Tree.

Ms. Hall reviewed the TSMO vision statement for members. She gave an overview of the six goals to align strategy and actions. The goals were keep everyone free from harm, collaborate and partner regionally, ensure reliable travel choices, eliminate disparities, prepare for change, and connect travel choices. She opened the discussion up to questions.

Member discussion included:

Mr. Desue expressed appreciation for TSMO.

In the chat Commissioner Jessica Vega Pederson expressed appreciation for the presentations given on congestion pricing and agreed that coordination would be needed between jurisdictions throughout the region. She also expressed support for addressing economic and equity impacts related to congestion pricing and investments in transit to provide more options to people travelling.

Mr. Winter added that there will be workshops over the summer to work on potential actions that would be presented back to JPACT in the fall.

Councilor Hyzy added to the chat she appreciates the opportunity to address equity and safety with TSMO.

6. UPDATES FROM JPACT MEMBERS

There was none.

7. AJOURN

Chair Craddick adjourned the meeting at 9:00 am.

Respectfully Submitted,



Connor Ayers
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JUNE 17, 2021

ITEM	DOCUMENT TYPE	DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
3.0	Press Release	06/17/21	TriMet General Manager Sam Desue press release	061721j-01
3.0	Presentation	06/17/21	May Traffic Fatalities	061721j-02
5.1	Presentation	06/17/21	Regional Mobility Policy Update Presentation	061721j-03
5.2	Presentation	06/17/21	Regional Congestion Pricing Study Presentation	061721j-04
5.3	Presentation	06/17/21	TSMO Strategy Presentation	061721j-05

**5.1 Resolution No. 21-5179 For the Purpose of
Accepting the Findings and Recommendation in the
Regional Congestion Pricing Study**

Action Items

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

Date: July 15, 2021
To: Joint Policy Advisory Committee on Transportation and Interested Parties
From: Elizabeth Mros-O'Hara, RCPS Project Manager
Subject: Accept Regional Congestion Pricing Study Findings and Recommendations

Purpose

Present JPACT the final Regional Congestion Pricing Study (RCPS) study report, including key findings, and recommendations for policy makers and future owners and operators to consider based on the study findings.

Ask JPACT to recommend acceptance of the report findings and recommendations via a resolution. The resolution will be brought to Metro Council for acceptance on July 29th.

Request to JPACT

Recommend that Metro Council accept the report findings and recommendations via a resolution at the July 29th Metro Council meeting.

Revisions to Draft Report and Recommendations

The Draft Report and Recommendations reflect two years of modeling, analysis, and input from technical staff, subject-matter experts and policy makers. TPAC provided important technical input on a regular basis to shape the findings, and JPACT and the Metro Council provided policy direction and other considerations to shape the study.

After completing the technical analysis, Metro shared draft recommendations, draft findings, and a draft RCPS report which were presented to TPAC, JPACT, and Metro Council for feedback in June. Metro also sent the Draft Regional Congestion Pricing Study Report to TPAC for comments. Comments were addressed and the report and recommended considerations were updated as described below.

Report

Attachment 1: Regional Congestion Pricing Study Final Report July 2021 includes a new executive summary and some minor revisions based on TPAC and stakeholder comments. Changes to the draft address comments on readability, clarifying considerations of an equity analysis and a potential suite of affordability programs to address equity concerns, and references to federal tolling stipulations. In addition, the report contains the final recommendations discussed below.

Recommended Considerations for Policymakers and Future Owners and Operators

Comments on the recommended considerations were focused on ensuring coordination with other pricing efforts and across different geographic scales, combining considerations that applied to both policy makers and future owners and operators; and making the recommendations more action-oriented and succinct. Metro staff has adjusted the recommendations as follows:

List of changes made as a result of feedback:

- Adjusted recommended considerations to have generalized considerations as well as considerations specific to policy makers or future project owners/operators.
- Added reference to other projects in the region
- Adjusted bullet about conversations related to pricing to include the state level when applicable.

- Added language to reflect that various pricing programs in the region should be coordinated.
- Added additional reference to impacts on low-income travelers.
- Modified wording to reflect suggestions from TPAC members.

Updated recommendations are included in **Attachment 1: Regional Congestion Pricing Study Final Report July 2021**.

Below are general recommended considerations for both policy makers and future project owners and operators, as well as specific recommendations that would apply to each group.

- Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region's land use and transportation system.
- Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.
- Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.
- Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
 - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety), and
 - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).
- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, 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 the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specifically For Policy Makers

- 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.
- Given the importance of pricing as a tool for the region's transportation system, policy makers should include pricing policy development and refinement as part of the next update of the Regional Transportation Plan in 2023, including consideration of other pricing programs being studied or implemented in the region.

Specifically For Future Project Owners/Operators

- The success of a specific project or program is largely based on **how** it is developed and implemented requiring detailed analysis, outreach, monitoring, and incorporation of best practices.
- Coordinate with other pricing programs, including analysis of cumulative impacts and consideration of shared payment technologies, to reduce user confusion and ensure success of a program.
- Conduct meaningful engagement and an extensive outreach campaign, including with those who would be most impacted by congestion pricing, to develop a project that works and will gain public and political acceptance.
- 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.
- Establish a process for ongoing monitoring of performance, in order to adjust and optimize a program once implemented.

Questions for JPACT

- Do JPACT members have any questions about the finalized recommendations and report?
- Does JPACT recommend Metro Council accept the findings and recommendations via a resolution on July 29th?

Next Steps - JPACT asked to recommend and Metro Council asked to accept the findings and recommendations via resolution

If JPACT recommends that Metro Council accepts the findings and recommendations in the Regional Congestion Pricing Study report at its meeting on July 15th, staff will ask the Metro Council to adopt them via the draft resolution at the Metro Council July 29, 2021 meeting.

The resolution and staff report are included as an attachment for JPACT review as **Attachment 2: Resolution 21-5179 For the Purpose of Adopting the Findings and Recommendations in the Regional Congestion Pricing Study** and **Attachment 3: Resolution 21-5179 Staff Report**.

Questions for JPACT

- Do JPACT members have any questions about the finalized recommendations and report?
- Does JPACT recommend Metro Council accept the findings and recommendations via a resolution on July 29th?

Attachments:

Attachment 1: Regional Congestion Pricing Study Final Report July 2021

Attachment 2: DRAFT Resolution 21-5179 For the Purpose of Adopting the Findings and Recommendations in the Regional Congestion Pricing Study

Attachment 3: Resolution 21-5179 Staff Report

**5.1 Resolution No. 21-5179 For the Purpose of
Accepting the Findings and Recommendation in the
Regional Congestion Pricing Study:**
[Final Report](#)

Action Items

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ACCEPTING THE) RESOLUTION NO. 21-5179
FINDINGS AND RECOMMENDATIONS IN THE)
REGIONAL CONGESTION PRICING STUDY) Introduced by Chief Operating Officer
) Marissa Madrigal in concurrence with
) Council President Lynn Peterson

WHEREAS, the greater Portland region has experienced significant growth and demographic changes, that are forecasted to continue into the future; and

WHEREAS, the region's significant growth has resulted in increasing congestion, particularly on the greater Portland area's throughways; and

WHEREAS, this congestion affects quality of life as travelers sit in cars or on transit, and impacts the economy through delayed movement of goods and services and lost productivity; and

WHEREAS, congestion impacts climate, equity, and safety, and disproportionately affects Black, Indigenous and people of color (BIPOC) community members and people with lower incomes who typically have fewer resources and often need to travel long distances between their homes and their jobs; and

WHEREAS, ongoing efforts to address congestion in the region include directing growth in designated centers and corridors served by high-quality transit in combination with investments in system and demand management strategies, improving transit service and reliability, increasing bicycle and pedestrian connections and adding roadway capacity in targeted ways; and

WHEREAS, the 2018 Regional Transportation Plan (RTP) found that these strategies are not sufficient for addressing growing congestion and that the region must also manage demand; and

WHEREAS congestion pricing, wherein drivers are charged directly for their use of roadways, bridges, or parking, is used in congested cities around the world to improve mobility, reduce pollution and greenhouse gas emissions, and to raise revenue to fund investments in their transportation systems; and

WHEREAS, congestion pricing can implemented to replace or supplement the existing per gallon gasoline tax, which delivers declining revenues because it does not adjust for inflation and because the vehicle fleet is becoming more fuel efficient; and

WHEREAS, the 2018 Regional Transportation Plan (RTP) identified congestion pricing as a high priority, high impact strategy to address congestion in ways that also advanced achievement of the region's climate, equity, and safety goals and directed further study of this strategy prior to the next update to the RTP; and

WHEREAS, the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) adopted policies in the 2018 RTP to expand the use of pricing strategies to manage vehicle congestion and encourage shared trips and the use of transit; and in combination with increased transit service, consider use of pricing strategies to manage congestion and raise revenue when one or more lanes are being added to throughways designated in the RTP; and

WHEREAS, the Regional Congestion Pricing Study established a goal to understand how our region could use congestion pricing to manage traffic demand to meet climate goals without adversely impacting safety or equity, but not to recommend projects or to implement any pricing measures; and

WHEREAS, the study was conducted with input from several regional committees and elected bodies, such as the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), Metro's Committee on Racial Equity (CORE), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and ODOT's Equitable Mobility Advisory Committee (EMAC), the County Coordinating Committees (staff and policymakers), and direction from JPACT and Metro Council; and

WHEREAS, the Regional Congestion Pricing Study project coordinated with the Portland Bureau of Transportation and the Oregon Department of Transportation as they conduct their own pricing studies; and

WHEREAS, on April 22, 2021, Metro hosted an expert review panel made up of congestion pricing experts with diverse expertise in North America and Europe to provide input on the study methods and findings and to share lessons learned for their experiences elsewhere; and

WHEREAS, the expert panel endorsed the study's technical approach and findings related to potential benefits and impacts of the pricing tools addressed, and offered recommendations for further study and implementation; and

WHEREAS, the study evaluated four different congestion pricing strategies in the Metropolitan Planning Area—a Vehicle Miles Travelled Fee, Cordon Pricing, Roadway Pricing, and Parking Pricing--for their potential effectiveness in greater Portland based on whether they could help the region achieve the four priorities as laid out in the 2018 RTP – advancing equity, improving safety, reducing greenhouse gas emissions and managing congestion; and

WHEREAS, the study identified considerations around equity, implementation, and ways to maximize benefits and address impacts of pricing projects; and

WHEREAS, the study found that:

1. all four congestion pricing strategies could help the Portland Metropolitan Region to meet the four regional transportation priorities adopted in the 2018 Regional Transportation Plan;
2. all four congestion pricing strategies could reduce drive alone rates, vehicle miles travelled and emissions, and increase transit ridership;
3. some congestion pricing strategies could cause vehicle diversion in some locations resulting in areas of delay and decreased job accessibility by auto or transit;
4. all four strategies could increase the overall cost for travel in the region, but individual traveler costs would vary;
5. the benefits and burdens of congestion pricing may not be distributed equitably across the region, potentially disproportionately impacting BIPOC and other marginalized communities;
6. the flexibility of congestion pricing tools could be used to address equity concerns and the design and implementation of a program could mitigate negative impacts; and

WHEREAS, the study provides policymakers and jurisdictions with information on promising pricing strategies, recommendations for trade-offs to consider and further evaluate based on modeling and data analysis, and recommendations for equitable implementation; and

WHEREAS, on July 15, 2021 JPACT recommended acceptance of the report by the Metro Council; and

WHEREAS, by accepting the report, the Metro Council hereby recognizes the value in using the findings to inform planning, policy, investment priorities and ongoing efforts to manage congestion, advance equity, improve safety and reduce greenhouse gas emissions throughout the region, now therefore,

BE IT RESOLVED THAT:

1. The Metro Council hereby accepts the findings and recommendations in the Regional Congestion Pricing Study Report, as shown in the attached Exhibit A.
2. The Metro Council hereby directs staff to build upon existing policy in the RTP by incorporating the findings and recommendations from the study in the 2023 RTP and to use them to inform the 2023 RTP update.

ADOPTED by the Metro Council this 29th day of July, 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 21-5179, FOR THE PURPOSE OF ACCEPTING FINDINGS AND RECOMMENDATION IN THE REGIONAL CONGESTION PRICING STUDY REPORT

Date: July 1, 2021
Department: Planning and Development
Meeting Date: July 29, 2021

Prepared by:
Elizabeth Mros-O'Hara
elizabeth.mros-ohara@oregonmetro.gov

ISSUE STATEMENT

The 2018 Regional Transportation Plan (RTP) identified congestion pricing as a high priority, high impact strategy to manage transportation demand to help the region meet its four transportation priorities – climate, congestion, equity, and safety, and directed further study of this strategy prior to the next update to the RTP.

Congestion is a problem in the Greater Portland region that will be exacerbated by changing travel patterns and a growing population, causing serious economic, social and environmental impacts.

In 2019, the Portland metro area ranked as the 8th most congested region in the country, with people in spending an average of 89 hours stuck in traffic (Source: 2019 Inrix Global Scorecard). In addition to slowing down commuters, transit and freight, congestion worsens the transportation sector's already high contribution to regional greenhouse gas emissions, and has inequitable impacts. The lowest income households spend a higher proportion of their income on transportation than those with the highest incomes, and the longer a trips equate to the more expensive travel, and low income and minority neighborhoods experience more exposure to toxic air from emissions than the average neighborhood.

However, it is clear the region cannot build its way out of congestion because of induced demand. When capacity is added to the transportation facility to address congestion, travelers change their behavior by changing the frequency, route, travel mode, and time of their travel to take advantage of that increased capacity. With more people driving on the facility at the peak times, that facility becomes congested. Consequently, investments in capital projects must be paired with travel demand management tools like congestion pricing.

Congestion pricing is a travel demand tool that has been shown to reduce congestion, reduce emissions, improve equity, and sometimes even reduce crashes where it has been implemented. The Regional Congestion Pricing Study is an examination of how congestion pricing could perform in this region, with our land use and transportation system.

The Metro Regional Congestion Pricing Study (Exhibit A) explored whether congestion pricing can benefit the Portland metropolitan region. Staff assessed four different pricing tools to understand how pricing could support an equitable, safe and sustainable transportation system:

- VEHICLE MILES TRAVELED FEE: 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

In preparing the study, staff coordinated with existing committees (Transportation Policy Alternatives Committee, Joint Policy Advisory Committee on Transportation, and Metro Council) for guidance and worked with project funding partners at City of Portland and TriMet, as well as ODOT, which is working on separate, parallel pricing projects.

ACTION REQUESTED

Approve Resolution No. 21-5179 accepting the findings and recommendations in the Regional Congestion Pricing Study Report, as recommended by the Joint Policy Advisory Committee on Transportation (JPACT) on July 15, 2021.

IDENTIFIED POLICY OUTCOMES

This work fulfills the direction provided in Chapter 8 of the 2018 RTP (Moving Forward Together). Section 8.2.3.2 (Regional Congestion Pricing Technical Analysis) acknowledges that current transportation supply-focused strategies to address congestion in the region are insufficient, and that we must also manage demand. It calls for a comprehensive regional study to be undertaken before the next update to the RTP to evaluate potential mobility, climate and equity impacts and policy implications of various pricing programs, including cordon pricing, VMT-based pricing and network based pricing.

The study also supports the 2018 RTP's transportation equity goals and policies, and Metro's agency-wide racial equity goals and Strategic Plan to Advance Racial Equity Diversity and Inclusion.

Pending Council approval of Resolution No. 21-5179, this work will inform planning, policy and investment priorities in the 2023 RTP update and ongoing efforts to manage congestion in a way that advances equity, improves safety and reduces greenhouse gas emissions throughout the region.

STAFF RECOMMENDATIONS

Staff recommends approval of Resolution No. 21-5179.

ANALYSIS/INFORMATION

Coordination and Review

Metro staff worked with local and national consultants that have extensive experience in congestion pricing, specifically implementation of congestion pricing programs in other regions, equity considerations, and data analysis. The consultant team was led by Nelson\Nygaard and included Sam Schwartz Engineering, HNTB, Silicon Transportation Consultants, TransForm, Mariposa Planning Solutions and PKS International.

Staff solicited input from several regional committees and elected bodies, such as the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro

Policy Advisory Committee (MPAC), Metro's Committee on Racial Equity (CORE), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and ODOT's Equitable Mobility Advisory Committee (EMAC), County coordinating committees (staff and policymakers), and direction from JPACT and Metro Council. The project coordinated with the Portland Bureau of Transportation and the Oregon Department of Transportation as they conduct their own pricing studies.

Metro also hosted an expert review panel made up of congestion pricing experts with diverse expertise in North America and Europe, who endorsed the study's technical approach and findings related to potential benefits and impacts of the pricing tools addressed, and offered recommendations for further study and implementation.

Advancing Metro's Racial Equity Goals and Climate Goals

This study can help advance Metro's racial equity goals by creating a foundational understanding of how to build equity into the congestion pricing program. The RCPS relied on best practices, input from local and national equity experts, and technical analysis (including modeling and mapping) to reveal the methods that a pricing program should employ to understand where benefits and impacts can occur and how the design of a program can improve equity.

Metro found that today's transportation funding system relies on regressive taxes and reinforces inequity by targeting the vast majority of spending to automobile infrastructure, favoring those that can afford a car, resulting in high emissions that disproportionately impact low income and BIPOC neighborhoods, and leave little funding for transit and active transportation which are disproportionately relied on by women, BIPOC, and low income populations.

A congestion pricing program can be more equitable if it employs best practices that are tailored to the places and people effected. Program design has the greatest potential to improve equity outcomes if it does three things: (1) builds affordability into the program (this can be realized in multiple ways such as providing discounts and exemptions for key groups or geographies), (2) focuses revenues on equity outcomes (this can include investing in key neighborhoods or facilities; focusing on transit, sidewalks, and/or bike lanes; and/or investing in senior or disabled services); (3) targets pricing benefits to key locations (mobility benefits and air quality can be targeted to equity communities).

The report lays out best practices any program going forward needs to employ to improve equity. In addition, it demonstrated that tools such as modeling and mapping are important to employ to understand the impacts and benefits to equity populations, geographies, and different types of travelers.

The study can also help advance Metro's climate action goals by helping lay the groundwork for congestion pricing tools to be moved forward. Each congestion pricing tool modeled and analyzed was shown to reduce greenhouse gasses and other harmful emissions.

Known Opposition – No known opposition.

Legal Antecedents

- Ordinance No. 18-1421 (For the Purpose of Amending the 2014 Regional Transportation Plan to Comply with Federal and State Law and Amending the Regional Framework Plan), adopted on December 6, 2018.
- Resolution No. 20-5086 (For the Purpose of Adopting the Fiscal Year 2020-21 Unified Planning Work Program and Certifying that the Portland Metropolitan Area is in Compliance With Federal Transportation Planning Requirements), adopted on May 21, 2020.

Anticipated Effects

Congestion pricing projects are currently being planned in the metro area. Specifically, ODOT is proposing congestion pricing on I-5 and I-205 throughout the region, and the City of Portland is studying a variety of pricing strategies as part of their Pricing Options for Equitable Mobility (POEM) project. Approval of this resolution and acceptance of the Regional Congestion Pricing Study's findings and recommendations reaffirms the Metro's commitment to its four transportation priorities – climate, congestion, equity, and safety, and assures that Metro staff and committees will work with these and subsequent projects to ensure that those regional priorities are addressed as pricing projects are included in future updates of the RTP.

Attachments

Exhibit A – Regional Congestion Pricing Study Report

**5.2 Resolution No. 21-5194 For the Purpose of
Adopting the 2025-2027 Regional Flexible Funds
Program Direction for the Portland Metropolitan Area**

Action Items

Joint Policy Advisory Committee on Transportation
Thursday, July 15, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE 2025-)	RESOLUTION NO. 21-5194
2027 REGIONAL FLEXIBLE FUNDS PROGRAM)	
DIRECTION FOR THE PORTLAND)	Introduced by Chief Operating Officer
METROPOLITAN AREA)	Marissa Madrigal in concurrence with
)	Council President Lynn Peterson
)	

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per Code of Federal Regulations Title 23 Section 450.306 and 450.326 to develop and implement a long-range metropolitan transportation plan and four-year investment program in a cooperative manner with the regions stakeholders; and

WHEREAS, the Portland metropolitan region periodically conducts a process to select projects and programs of regional significance in which to invest the region’s allotment of federal surface transportation funds, known as the Regional Flexible Funds Allocation (RFFA); and

WHEREAS, the RFFA is one element of the Metropolitan Transportation Improvement Program (MTIP), which reports on the performance and programming of all federal surface transportation funds to be spent in the Portland metropolitan region; and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per Code of Federal Regulations Title 23, Section 450.324 to allocate these funds to projects and programs in the metropolitan region and preceding the allocation, have developed a program direction statement defining how the region should consider investments for federal fiscal years 2025-2027 for the regional flexible funds; and

WHEREAS, the Metro Council and JPACT adopted an updated Regional Transportation Plan (RTP) in December 2018; and

WHEREAS, the three-year process to create the 2018 RTP engaged stakeholders throughout to the region to develop the goals, objectives, and policies for the long-range transportation plan and the associated transportation investment priorities; and

WHEREAS, the adopted 2018 RTP specified four regional investment priorities to focus on in the near-term with the region’s transportation funding: Equity, Safety, Climate and Congestion; and

WHEREAS, three public workshops were held in development of the 2025-2027 RFFA Program Direction to gather input from a broad range of perspectives on prioritizing the regional transportation funding; and

WHEREAS, input has been sought and received from the Transportation Policy Alternatives Committee as well as JPACT on the updated Program Direction; and

WHEREAS, input from the workshops, TPAC and JPACT affirmed the four RTP regional investment priorities are the priorities directing the 2025-2027 RFFA; now therefore,

BE IT RESOLVED that the Metro Council adopt the 2025-2027 Regional Flexible Funds Allocation Program Direction.

ADOPTED by the Metro Council this 9th day of September 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



DRAFT 2025-2027 Regional Flexible Funds Allocation Program Direction

(Resolution 21-5194)

July 2021

Nondiscrimination Notice to the Public

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

TABLE OF CONTENTS

• Introduction	1
• Regional Six Desired Outcomes	2
• 2018 Regional Transportation Plan Investment Priorities	2
• Regional Transportation Finance Approach	4
• Regional Flexible Funds Allocation Objectives	5
• 2025-2027 Regional Flexible Funds Structure	6
○ Step 1A – Bond Repayment Commitments	7
○ Step 1B – Regionwide Investments and Planning	8
○ Step 2 – Capital Investments	9
• Step 2 Project Selection Process	13

draft

This page left intentionally blank.

draft

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

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.

If a federal authorization bill is not completed by the time of the release of the Step 2 call for projects or the time to recommend projects for selection, the use of an “illustrative list of projects” may be considered as a means of managing the uncertainty of funding levels and ensuring the region is preparing an adequate pipeline of projects to prepare to obligate available funding as quickly as possible.

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) ⁸	Performance Measures to Consider ⁹
<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

⁷ Summarized from 2018 RTP Regional Transportation Plan

⁸ Criteria refinements will be developed prior to the Call for Projects in November 2021

⁹ 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) ⁸	Performance Measures to Consider ⁹
color and other historically marginalized communities.		<ul style="list-style-type: none"> • 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

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. The 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. The work group membership will include regional agency staff and community members with expertise in transportation. A subset of the work group will assist in the technical analysis of Step 2 project proposals.

The technical analysis will measure how completely and thoroughly proposed projects address the 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.

draft

This page left intentionally blank.

draft

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Stay in touch with news, stories and things to do.

oregonmetro.gov/news

Follow oregonmetro



Metro Council President

Lynn Peterson

Metro Councilors

Shirley Craddick, District 1

Christine Lewis, District 2

Gerritt Rosenthal, District 3

Juan Carlos González, District 4

Mary Nolan, District 5

Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

Memo

Date: July 1, 2021
To: JPACT 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 JPACT’s approval.

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 2025-2027 RFFA 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, several potential 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 table in the 2025-2027 RFFA Program Direction lists the criteria to be used to demonstrate how thoroughly and completed a proposed project is aligned with RTP Investment Priorities. Further work to develop and refine performance measures will be conducted by a technical evaluation work group convened by Metro. The work group will be comprised of regional and local 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.

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.

TPAC recommendation

In their June 4, 2021 meeting, TPAC discussed the draft 2025-2027 RFFA Program Direction and recommended JPACT approval of it. In their recommendation, TPAC requested the following clarifications be included:

- Additional language added (page 6) to address the uncertainty of the federal funding forecast as of this date. TPAC advised that along with the selection of Step 2 projects to be funded, a provisional list of projects be developed, should the amount of available funding in this cycle be greater than the estimated \$142,350,000.
- TPAC recommended that local agency staff assist with the development of performance measures and be included in the technical evaluation work group. Local agency staff participation is limited to performance measure development and they will not participate in the technical evaluation process.

Next steps/requested action

Staff is seeking JPACT approval of the TPAC-recommended 2025-2027 RFFA Program Direction. Upon JPACT's approval, Metro Council is scheduled to consider and take action to adopt it on September 9, 2021.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 21-5194, FOR THE PURPOSE OF ADOPTING THE 2025-2027 REGIONAL FLEXIBLE FUNDS ALLOCATION POLICY REPORT FOR THE PORTLAND METROPOLITAN AREA

Date: July 1, 2021
Department: Planning and Development
Meeting Date: September 9, 2021

Prepared by: Dan Kaempff,
daniel.kaempff@oregonmetro.gov

Presenter(s): Margi Bradway, Ted Leybold,
Dan Kaempff
Length: 30 minutes

ISSUE STATEMENT

Every three years, the JPACT and Metro Council, in their role as the federally designated Metropolitan Planning Organization (MPO) board, conduct a process to select transportation investments to be made with the MPO's allocation of federal surface transportation funds, known as the Regional Flexible Funds Allocation (RFFA). These funds are required to be used for projects and programs which advance the policy set forth in the 2018 Regional Transportation Plan (RTP).

This resolution codifies the specific policy direction for how the region is to invest these flexible funds in the federal fiscal years 2025 through 2027 in accordance with the regional investment priorities established in the 2018 RTP.

ACTION REQUESTED

Approve Resolution No. 21-5194.

IDENTIFIED POLICY OUTCOMES

Resolution No. 21-5194 supports investments in the region's transportation system that advance four investment priorities; Equity, Safety, Climate Change, and Congestion. Through the 2018 RTP development and adoption process, these priorities were identified by stakeholders and elected officials as the most critical system needs, and they form the foundation for the RTP investment strategy. The RFFA policy report focuses this funding on investments that address and show improvement in these four priority areas.

POLICY QUESTION(S)

The Regional Flexible Funds provide the opportunity for the region to both leverage other sources of funding, and to focus investment on areas of the system which are critical but do not have other dedicated sources of funding. Through this resolution, the RFFA policy identifies which of these important needs are to receive funding, in order to fulfill RTP policy direction.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

At the March 9, 2021 Metro Council work session, Council outlined three policy principles to be followed in development of the 2025-2027 RFFA program direction.

In that work session, Council affirmed that the following three main principles should be followed in the development of the 2025-2027 RFFA Program Direction:

1. In developing the 2018 Regional Transportation Plan (RTP), regional leaders agreed upon a set of recommendations for investments needed to better meet the region's shared goals. The Metro Council at that time directed jurisdictional partners to review and refine their project lists to the extent practicable to help make more progress on these near-term regional transportation investment priorities:
 - a. Equity – Equity is central to all investment priorities. The negative impacts of previous transportation investments fall most heavily on BIPOC and low-income communities. Flexible funds should be focused on investments that reduce these burdens and improve the quality of life for these communities, consistent with the RTP's transportation equity goals and policies.
 - b. Safety – The region has adopted a Vision Zero goal to eliminate the number of traffic deaths and severe injuries, yet the number of fatal and severe injury crashes in the region continues to rise. Flexible funds should be invested in areas with the greatest demonstrated safety need and in a manner that will move the region as quickly as possible towards Vision Zero utilizing the strategies and actions of the Regional Transportation Safety Strategy.
 - c. Climate – Metro's Climate Smart Strategy is the region's adopted direction on how to reduce greenhouse gas emissions from transportation sources. Flexible funds should be invested in a manner consistent with implementing Climate Smart Strategy policies and supporting actions.
 - d. Congestion – While the RTP acknowledges that congestion cannot be eliminated, the flexible funds should support investments that can improve system efficiency, travel time reliability, and expand people's travel choices, consistent with the region's Congestion Management Process.

Council affirms these four RTP investment priorities are the priorities for the 2025-2027 RFFA.

2. The existing two-step framework should continue in the 2025-2027 RFFA. Council recognizes the purposes for and affirms the importance of continuing regional investments made through Step 1. These investments respond to various federal, state and regional obligations and commitments to manage congestion, improve air quality and plan for future growth throughout the region.

The Step 2 capital project funding is an important means of ensuring the vision defined in the RTP comes to fruition. Over the years, these funds have been invested in many transformational projects throughout the region. Continuing to provide funding for local jurisdiction projects that support the four RTP investment priorities is a key component of achieving our regional vision and goals.

3. Council supports adjustments to the existing Step 2 project funding categories and targets. Experience has demonstrated that through thoughtful planning and design, the region can make investments that achieve positive outcomes and address multiple transportation needs. The criteria and selection process for Step 2 projects should be refocused in a manner that supports investing in local projects that benefit the regional transportation system as defined through the four RTP priority areas. Council is open to considering

recommendations for additional investment priority areas that are rooted in regional policy or Council endorsed direction, such as the Metro Council's Six Desired Outcomes.

The 2025-2027 RFFA Program Direction to be adopted by Resolution No. 21-5194 follows this direction previously provided by Council.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Resolution No. 21-5194 supports Metro's goals to address racial equity and climate change, as well as making safety and congestion improvements to the region's transportation system. It continues the development of active transportation and high-capacity transit networks that support the region's 2040 growth strategy and provide people with travel options. And it invests in projects that help provide jobs and support important economic sectors.

These outcomes were widely discussed in the three-year process leading to the development of the 2018 RTP. Over 19,000 individual points of contact with stakeholders led to the identification of the RTP investment priorities, and the RFFA policy was built around advancing these priorities.

Specifically, the RFFA policy follows RTP prioritization for investments in these four priority areas:

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 – 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.

- 1. Known Opposition:** None known at this time
- 2. Policy Development Stakeholders:** TPAC and JPACT developed the 2025-2027 RFFA Program Direction, using input received through three public workshops. The workshop participants included local and regional jurisdictional staff, elected officials, non-governmental organization representatives and community members. The RFFA program framework directly supports and implements the 2018 RTP investment priorities, which were determined through an extensive public process as noted above
- 3. Legal Antecedents:** Updates the 2022-2024 Regional Flexible Funds Allocation Policy Report, adopted by Metro Council Resolution 19-4959 on April 4, 2019
- 4. Anticipated Effects:** Adoption of this resolution will provide the policy direction, program objectives and procedures that will be used during the 2025-2027 Regional Flexible Fund Allocation process to nominate, evaluate and select projects to receive federal transportation funds as detailed in Table 6 of the policy direction document
- 5. Financial Implications:** There are no impacts for Metro's current budget. This resolution proposes policy for determining future allocations. The amounts are illustrative and rely on a continuation of funding at historic levels with modest inflationary increases. The proposal maintains Step 1 funding for MPO functions on the same proportion and requires the same

10.27 percent match from local participants. Final allocations will depend on available federal funding.

BACKGROUND

The 2025-2027 RFFA Program Direction builds upon previous RFFA direction established by JPACT and Metro Council. It has been updated to align with new regional policy from the 2018 RTP and the supportive modal and topical strategies, specifically focusing on the four investment priorities noted above. It continues the two-step funding approach adopted for the 2014-2015 allocation cycle, which directs funding towards region-wide investments and supports construction of capital projects in specific focus areas.

Through previous RFFA investments made under this two-step approach, the region has helped expand the MAX light rail and Portland Streetcar systems with planning and construction funding. It has provided funding to develop a pipeline of active transportation projects to be ready for future funding opportunities. It has supported highway bottleneck projects by targeting funding to associated arterial improvements. It has supported funding for system and demand management strategies, and improving transit usage through housing and commercial investments. It has helped freight move more reliably with improved safety for all users. And it has helped construct dozens of projects that help people walk, bicycle or access transit more safely and easier.

Based on input from the three RFFA workshops, as well as feedback from TPAC and JPACT, the capital project funding (aka Step 2) category has been changed for this cycle. Previously, Step 2 consisted of two modal target subcategories. 75 percent of the available funding was directed towards Active Transportation and Complete Streets projects. The remaining 25 percent was directed towards projects to improve Freight Mobility and support Economic Outcomes.

The 2025-2027 RFFA Program Direction continues investments in these key regional system needs, focusing on project outcomes that advance the four RTP investment priorities. But the two previous project subcategories have been combined into a single category. Project selection criteria for the Step 2 investments are intended to illustrate how projects perform in each of the four RTP investment priorities. Further work will be conducted during the summer of 2021 to develop performance measures relevant to each of the four criteria and that will be used in the technical evaluation of proposed projects.

Adoption of Resolution No. 21-5194 enables staff to proceed with the next steps in the RFFA process and maintain a timeline which is keyed on having a final list of investments recommended by JPACT in the fall of calendar year 2022. Council is scheduled to consider and take action on a JPACT-approved project list in October 2022. Maintaining this schedule is critical in order for the region to stay coordinated with the state's preparation of the Statewide Transportation Improvement Program (STIP), which is scheduled to be submitted to the federal Department of Transportation in the summer of 2023.

If the RFFA projects are not selected and approved for inclusion in the STIP in a timely manner, the region's ability to spend federal transportation funds could be negatively impacted.

ATTACHMENTS

Resolution No. 21-5194

2025-2027 RFFA Program Direction



Memo

Date: July 1, 2021

To: JPACT 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.

Materials following this page were distributed at the meeting.

June 2021 traffic deaths in Clackamas, Multnomah and Washington Counties*

Michael Gazley-Romney, 31, motorcycling, Multnomah, 7/1

Delbert Downing, 51, driving, Multnomah, 6/30

Edwin Dean Anderson Jr., 42, driving, Clackamas, 6/28

Kyle Joseph Kinkaid, 34, motorcycling, Washington, 6/21

Unknown, walking, Multnomah, 6/14

Joshua James Bologna, 34, motorcycling, Washington, 6/13

Paul David Matthews, 63, driving, Multnomah, 6/2



**ODOT preliminary fatal crash report and news reports, as of 7/1/21*

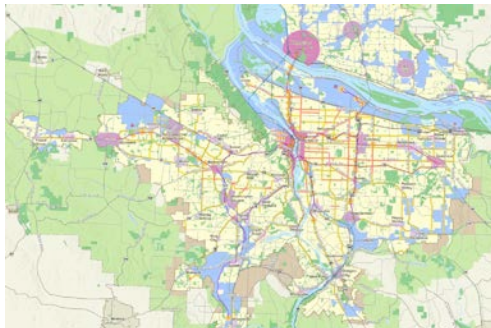


What is the Regional Transportation Plan?

2018 Regional Transportation Plan



2040 Growth Concept



20-year plan

Updated every 5 years through coordination, consultation and outreach

State requirements: link land use and transportation goals and reduce GHGs

Federal requirements:

- performance-based planning
- congestion management
- air quality
- civil rights/equity
- protection of public health and the environment

2018 Regional Transportation Plan

Regional Transportation Plan vision:

"In 2040, everyone in the Portland metropolitan region will share in a prosperous, equitable economy and exceptional quality of life sustained by a safe, reliable, healthy and affordable transportation system with travel options."



2018 RTP investment priorities

reflecting feedback from the public and stakeholders



Equity



Climate Smart



Safety



Congestion

What we also heard from partners and the public in 2018

- Changing times call for changing approaches to transportation funding
- Put equity at the forefront of work
- Show how funding projects advance regional goals
- Interest in exploring pricing mechanisms to reduce GHG



JPACT adopted policy on pricing (2018 RTP)

- ***Objective 4.6 (Pricing)* – Expand the use of pricing strategies to manage vehicle congestion and encourage shared trips and use of transit.**
- ***Policy 6 (Congestion)* – In combination with increased transit service, consider use of value pricing to manage congestion and raise revenue when one or more lanes are being added to throughways.**

2018 RTP Chapter 8: JPACT directed Metro to do a technical Regional Congestion Pricing Study

- Chapter 8. Section 2.3.2 (page 8-19) called for a regional congestion pricing study
- Acknowledgement that more study and analysis was needed before the next RTP Update

8.2.3.2 Regional Congestion Pricing Technical Analysis

Lead agency	Partners	Proposed timing
Metro and ODOT	Cities, counties, FHWA	2019-TBD

Growing congestion on the greater Portland area's throughways is increasing travel delays and unpredictability. This congestion affects quality of life as travelers sit in cars or on the bus, and impacts the economy through delayed movement of merchandise and lost productivity.

Ongoing efforts to address congestion in the region include investments in system and demand management strategies, improving transit service and reliability, increasing bicycle and pedestrian access and adding highway capacity in targeted ways. But it is clear that these strategies are not sufficient and will result in continued congestion in our region. We cannot address congestion through supply alone; we must also manage demand.

Through the end of 2018, ODOT is conducting a feasibility analysis to explore the options available and determine how congestion pricing, also known as value pricing, could help ease congestion in the greater Portland area.

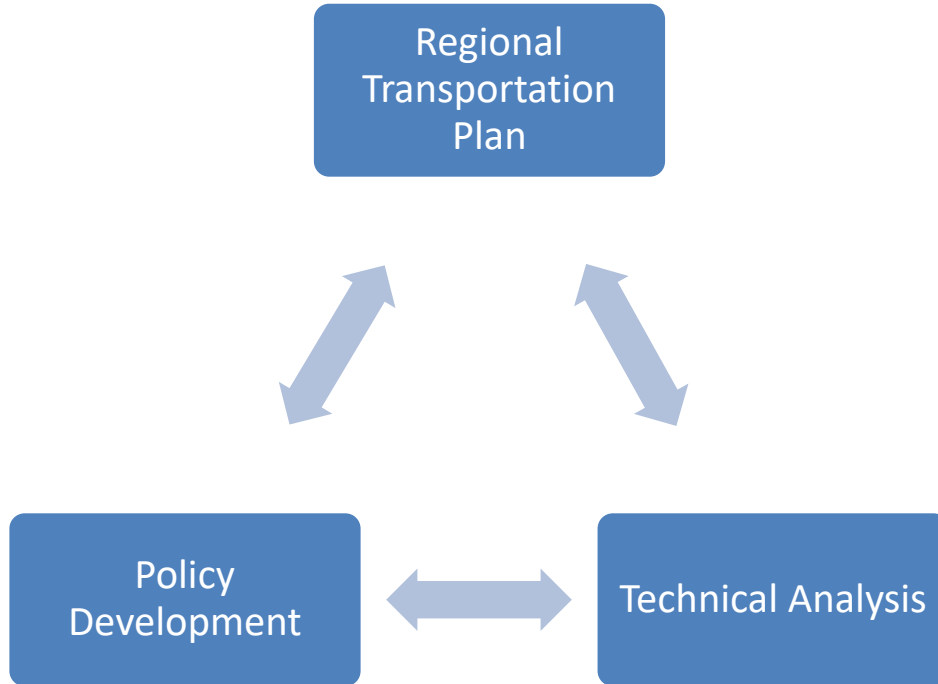
2018 RTP Chapter 8: Regional Congestion Pricing Study

“The (ODOT’s Value Pricing) project’s limited scope has raised larger questions about how demand management pricing strategies could be implemented throughout the region; **further study is needed in this area and should be undertaken to better understand different ways that pricing could work regionally and the different policy outcomes that various pricing programs, including cordon pricing, VMT-based pricing and network-based pricing might have.** In addition, the study should evaluate issues and outcomes related to equity, safety and alternative investments, including the interaction between pricing and increased transit access.

A comprehensive, regional study should be undertaken before the next update to the RTP in order to provide policy guidance as to how different types of pricing programs might impact traffic congestion, people and vehicle throughput, freight mobility, greenhouse gas emissions, air pollution, outcomes for under-served communities, mode share and overall traffic volumes and whether they improve the regional transportation system.”

	Lead Agency	Proposed timing
Regional Mobility Policy Update	Metro, ODOT	2019-21
Regional Congestion Pricing Technical Analysis	Metro, ODOT	2019-TBD
Transportation System Management and Operations Strategy Update	Metro	2019-20
Jurisdictional Transfer Assessment Program	Metro, ODOT	2019-20
Transit planning	TriMet, SMART	Annually
Enhanced Transit Concept Pilot Program	Metro, TriMet	2018-22
Central City Transit Capacity and Steel Bridge Analysis	Metro, TriMet	2019
Transportation Equity Analysis and Monitoring	Metro	2019-23
Funding Strategy for Regional Bridges	Counties	2019-21
Emergency Transportation Routes Project	Metro, RPDO	2019-20
Regional Freight Delay and Commodities Movement Study	Metro, ODOT	2022
Regional Freight Rail Study	Metro, Port	2023
Regional Transportation Functional Plan Update	Metro	TBD
Parking Management Policy Update	Metro	TBD
Green Corridor Implementation	Metro	TBD
Frog Ferry Passenger River Taxi Service Study	Friends of Frog Ferry	TBD

RTP – 5 Year Cycle



2023 RTP Update

WHAT IS THE ANTICIPATED TIMELINE FOR THE UPDATE?



Draft Schedule for 2023 RTP Update

- Fall 2021 – Kick off formal scoping with JPACT, Metro Council and stakeholders
- Winter 2022 – JPACT and Metro Council Approve Workplan
- Spring 2022 – Sept 2023 – **Policy Updates**
- Sept/Nov 2023 – Formal Adoption Process



Metro

Regional Congestion Pricing Study

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.

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

Study Outcomes

RCPS findings to:

- Inform future discussions on implementing congestion pricing and policy recommendations
- Outline next steps for evaluation and further study

Metro is not an implementer

Experts Input our Methods and Outcomes- *Expert Review Panel April 22, 2021*



Jennifer Wieland - moderator

Managing Director. Expert in congestion pricing and equity-focused studies

NelsonWygaard



Daniel Firth

Transport and Urban Planning Director; Congestion pricing leader in London, Stockholm and Vancouver

C40



Sam Schwartz

Founder and CEO; Father of NYC congestion pricing

Sam Schwartz Transportation Consultants



Rachel Hiatt

Assistant Deputy Director for Planning; Project manager of the Downtown Congestion Pricing Study

San Francisco County Transportation Authority



Christopher Tomlinson

Executive Director; Expert in political, policy and legal aspects of tolling

*State Road and Tollway Authority, Georgia
Regional Transportation Authority,
Atlanta-region Transit Link Authority*



Clarrissa Cabansagan

Director of Programs; National leader in transportation policy and mobility justice

TransForm

Revisions

- Combined bullets to create generalized considerations as well as considerations specific to policy makers or future project owners/operators.
- References to other projects in the region and importance of coordination.
- Modified bullet about conversations related to pricing to include the state level when applicable.
- Reference impacts on low-income travelers.
- Modified wording to reflect suggestions from TPAC members and others.

General recommended considerations:

Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region's land use and transportation system.

Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.

Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.

General recommended considerations (cont'd):

Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:

- maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety), and
- address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).

Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.

General recommended considerations (cont'd):

Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specific for Policy Makers:

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.

Specific for Policy Makers (cont'd):

Given the importance of pricing as a tool for the region's transportation system, policy makers should include pricing policy development and refinement as part of the next update of the Regional Transportation Plan in 2023, including consideration of other pricing programs being studied or implemented in the region.

Specific for Future Project Owners/Operators:

The success of a specific project or program is largely based on **how** it is developed and implemented requiring detailed analysis, outreach, monitoring, and incorporation of best practices.

Coordinate with other pricing programs, including analysis of cumulative impacts and consideration of shared payment technologies, to reduce user confusion and ensure success of a program.

Specific for Future Project Owners/Operators (cont'd):

Conduct meaningful engagement and an extensive outreach campaign, including with those who would be most impacted by congestion pricing, to develop a project that works and will gain public and political acceptance.

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.

Establish a process for ongoing monitoring of performance, in order to adjust and optimize a program once implemented.

Resolution – In packet with staff report

- Resolution accepts the RCPS report
 - findings and recommended considerations
- TPAC voted to recommend with friendly amendment

Next Steps

Wrapping up July

- Metro Council final meeting to accept the report
- Final report with findings will be available for public after being accepted

2023 RTP update process over the next two years with

oregonmetro.gov

elizabeth.mros-ohara@oregonmetro.gov



Resolution 21-5194: 2025-2027 Regional Flexible Funds Allocation (RFFA) Program Direction

Presentation to JPACT
July 15, 2021



Metro



2025-27 RFFA Program Direction

- Statement of intent to target regional funds to achieve regional priorities
- Defines funding categories (Steps 1 & 2)
- Sets objectives and outcomes for allocation process



DRAFT 2025-2027 Regional
Flexible Funds Allocation
Program Direction

(Resolution 21-5194)

July 2021

Developing the Program Direction

- Feb. – June: Eight meetings and workshops conducted to discuss how to update RFFA Program Direction
- Over 100 people (TPAC, jurisdiction staff and community members) participated and provided their thoughts and insights

Updates from 22-24 Direction

Changed Step 2 funding categories and split to single category

Multiple-outcome projects focused on four RTP Investment Priorities



Equity



Climate



Safety



Congestion

Step 2 project 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

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 (\$20 million)

- Sharing application, outcomes evaluation, risk assessment with RFFA
- Separate decision-making processes for each funding source
- One application for partners, improved regional coordination

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:
September 9: 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.

Discussion and request for approval of Resolution 21-5194

