



600 NE Grand Ave.
Portland, OR 97232-2736

Council meeting agenda

Thursday, November 4, 2021

10:30 AM

<https://zoom.us/j/615079992> or
888-475-4499 (toll free)

Revised 11/2 This Council Meeting will adjourn to a Work Session.

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/615079992> 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.

1. Call to Order and Roll Call

2. Public Communication

Public comment may be submitted in writing and will also be heard by electronic communication (videoconference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by noon on the day of the meeting will be provided to the council 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 agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda 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. Consent Agenda

- 3.1 Considerations of the Council Meeting Minutes for the
October 21, 2021 Meeting.

[21-5619](#)

Attachments: [102121cw+c Minutes](#)

- 3.2 Resolution No. 21-5208, For the Purpose of Approving the PERS Contribution for Marissa Madrigal, Chief Operating Officer
Attachments: [Resolution No. 21-5208](#) [RES 21-5208](#)

4. Resolutions

- 4.1 Resolution No. 21-5212, For the Purpose of Authorizing an Exemption from Competitive Bidding and Procurement of Construction Manager/General Contractor Services by Competitive Request for Proposals for the Arlene Schnitzer Concert Hall City Sewer Connection Project
Presenter(s): Julie Hoffman (she/her), Metro
Nancy Strening (she/her), Metro
Attachments: [Resolution No. 21-5212](#)
[Exhibit A](#)
[Staff Report](#) [RES 21-5212](#)

- 4.1.1 Public Hearing for Resolution No. 21-5212

- 4.2 Resolution No. 21-5205, For the Purpose of Amending the 2021-26 Metropolitan Transportation Improvement Program (MTIP) to Amend or Add Approximately 13 Projects Impacting Metro, Oregon Department of Transportation, Portland, And Tualatin Hills Parks and Recreation District Ensuring Required Federal Approvals and Phase Obligations Can Move Forward (OC22-01-OCT)
Presenter(s): Margi Bradway (she/her), Metro
Ted Leybold (he/him), Metro
Attachments: [Resolution 21-5205](#)
[Exhibit A](#)
[Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)
[Attachment 4](#) [RES 21-5205](#)

5. Ordinances (First Reading and Public Hearing)

- 5.1 Ordinance No. 21-1467, For the Purpose of Amending the [ORD 21-1467](#)
2018 Regional Transportation Plan to Include the
Preliminary Engineering Phase of the I-205 Toll Project,
and to Clarify the Financial Connection of the I-205 Toll
Project to the I-205 Improvement Project

Presenter(s): Mandy Putney (she/her), Oregon Department of Transportation
Brendan Finn (he/him), Oregon Department of Transportation
Kim Ellis (she/her), Metro

Attachments: [Draft Ordinance No. 21-1467](#)
[Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)

- 5.1.1 Public Hearing for Ordinance No. 21-1467

6. Adjourn to Work Session

Work Session

1. Call to Order and Roll Call

2. Work Session Topics:

- 2.1 Affordable Housing Bond Program update [21-5610](#)

Presenter(s): Patricia Rojas (she/her), Metro
Emily Lieb (she/her), Metro

Attachments: [Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)

3. Councilor Communication

4. Chief Operating Officer Communication

5. Adjourn

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

إشعار بعدم التمييز من Metro

تحتزم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يُرجى 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.

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Television schedule for Metro Council meetings

<p>Clackamas, Multnomah and Washington counties, and Vancouver, WA Channel 30 – Community Access Network <i>Web site:</i> www.tvctv.org <i>Ph:</i> 503-629-8534 Call or visit web site for program times.</p>	<p>Portland Channel 30 – Portland Community Media <i>Web site:</i> www.pcmtv.org <i>Ph:</i> 503-288-1515 Call or visit web site for program times.</p>
<p>Gresham Channel 30 - MCTV <i>Web site:</i> www.metroeast.org <i>Ph:</i> 503-491-7636 Call or visit web site for program times.</p>	<p>Washington County and West Linn Channel 30– TVC TV <i>Web site:</i> www.tvctv.org <i>Ph:</i> 503-629-8534 Call or visit web site for program times.</p>
<p>Oregon City and Gladstone Channel 28 – Willamette Falls Television <i>Web site:</i> http://www.wftvmedia.org/ <i>Ph:</i> 503-650-0275 Call or visit web site for program times.</p>	

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Agenda Item No. 3.1

Consideration of the Council Meeting minutes for October 21, 2021

Consent Agenda

Metro Council Meeting
Thursday, November 04, 2021

Metro

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



Metro

Minutes

Thursday, October 21, 2021

10:30 AM

**Revised 10/19 This Council Meeting will adjourn to a Work
Session.**

<https://zoom.us/j/615079992> or 888-475-4499 (toll free)

**Council Meeting
&
Work Session**

1. Call to Order and Roll Call

Deputy Council President Craddick called the Metro Council meeting to order at 10:32 a.m.

Present: 5 - Councilor Shirley Craddick, Councilor Christine Lewis, Councilor Juan Carlos Gonzalez, Councilor Mary Nolan, and Councilor Gerritt Rosenthal

Excused: 1 - Council President Lynn Peterson

2. Public Communication

Deputy Council President Craddick opened the meeting to members of the public wanting to testify on a non-agenda items.

Chris Smith on behalf of No More Freeways reflected on the MTIP amendment that was discussed in Tuesday's work session and expressed concern about ODOT's assertion that they will manage greenhouse gases by reducing congestion. Chris argued that VMT is the metric that must be kept track of in order to understand the levels of greenhouse gases emitted.

Seeing no further discussion on the topic, Deputy Council President Craddick moved on to the next agenda item.

3. Presentations**3.1 Emergency Management Follow-up Audit Presentation**

Deputy Council President Craddick introduced Brian Evans (he/him) and Angela Owens (she/her) to present on the topic.

Auditor Evans explained why the Auditor's Office performed the follow up audit that was done on Metro's preparedness for emergency management.

Angela summarized the status of the recommendations made by the Office of the Auditor after the initial audit in 2018, then discussed two potential improvements that were identified during this follow up audit.

Chief Operating Officer Marissa Madrigal (she/her) responded to Auditor Evans and Angela's presentation by expressing appreciation for the initial and follow up audits and briefly discussed what the emergency management team have recently implemented.

In response to Councilor Rosenthal's questions Auditor Evans expressed that he is not sure as to what extent Metro can declare a regional emergency and explained that this follow up audit did not look at emergency sites.

Marissa also responded to Councilor Craddick's question explaining that Metro is able to declare an emergency but this only pertains to Metro's government and does not extend to the community.

Metro Attorney Carrie MacLaren (she/her) confirmed Marissa's explanation, reiterating that Metro can declare an emergency for itself and its operations.

Marissa responded to Councilor Rosenthal's follow up question by explaining that there are distinctions between different types of emergencies that are declared.

Auditor Evans responded to Deputy Council President Craddick's question by explaining that typically the Office of the Auditor only follows up once but expressed that they may need to reassess the frequency of follow ups.

Council Discussion

Councilor Rosenthal asked if Council has the ability to declare a regional emergency or disaster and asked if the audit investigated emergency shelter. Councilor Rosenthal followed up by asking if the state distinguished physical and health emergencies.

Councilor Lewis encouraged Council to have a discussion about what Councilors' roles are in emergencies and believes that Councilors should have had a better communication response during recent regional emergencies to help residents within the region understand what Council was doing and what resources are available.

Deputy Council President Craddick asked staff if they have plans to present to Council about this information again.

4. Consent Agenda

A motion was made by Councilor Nolan, seconded by Councilor Rosenthal, to adopt items on the consent agenda. The motion passed by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

4.1 Consideration of the Council Meeting minutes for September 30, 2021.

5. Resolutions

5.1 Resolution No. 21-5210, For the Purpose of Declaring a Vacancy in the Office of Metro Councilor for Council District No. 6

Deputy Council President Craddick called on Ina Zucker (she/her) to present to Council.

Ina explained the process of filling Councilor Stacey's seat and highlighted that Council will finish the redistricting process before moving into the process for appointing

Councilor Stacey's successor.

Ina responded to Deputy Council President Craddick's question by explaining that details about that the interview process are up to Council.

Ina responded to Councilor Lewis' question by explaining that the list of communication that Ina discussed in her presentation is the minimum outreach that must be performed by Council and any extra communication can be performed by Councilors.

In response to Councilor Nolan's comment Ina expressed that staff is considering the conflicting timelines between redistricting and announcing Councilor Stacey's open seat.

Metro Attorney Carrie MacLaren (she/her) explained that districts will be finalized before any applications for District 6's open seat are due.

Council Discussion:

Deputy Council President Craddick asked staff about the interview process and if Council will put together a group of interview questions.

Councilor Lewis asked about the public notification process and what channels Council has control over to get word out about this opening.

Councilor Nolan expressed concern about announcing the open seat when the redistricting process is still ongoing and wants Council and staff to give adequate time after district lines are approved to spread notice of the open seat. Councilor Nolan followed up by explaining that by releasing the application for District 6's open seat while District 6's

boundaries are not yet set, Metro is putting some applicants at a disadvantage. Councilor Nolan hopes that this will act as incentive for the redistricting subcommittee to work in a timely manner.

Seeing no further discussion on the topic, Deputy Council President Craddick moved on to the next agenda item.

A motion was made by Councilor Rosenthal, seconded by Councilor Lewis, that this Resolution was adopted. The motion carried by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

6. Ordinances (Second Reading)

6.1 Ordinance No. 21-1469A, For the Purpose of Establishing Criteria for Metro Council District Reapportionment and Declaring an Emergency

Deputy Council President Craddick stated that the first reading and public hearing for Ordinance No. 21-1469A took place on Thursday, October 14 and introduced Anne Buzzini (she/her) to present on the Ordinance.

Staff pulled up *Ordinance No. 21-1469A Proposed Amendments PowerPoint*.

Metro Attorney Carrie MacLaren responded to Councilor Lewis' question by confirming that the calculation used in the whereas clause is the same that is announced later in the ordinance.

Council Discussion

Councilor Rosenthal presented an amendment to Ordinance No. 21-1469A to insert "WHEREAS, the 2020 U.S. Census identified the Metro population as 1,670,601, thereby

establishing an average district population of 278,434" in order to add clarification and useful information.

Deputy Council President Craddick called for a motion to amend Ordinance 21-1469A to include "WHEREAS, the 2020 U.S. Census identified the Metro population as 1,670,601, thereby establishing an average district population of 278,434".

A motion was made by Councilor Rosenthal, seconded by Councilor Nolan, that Resolution 21-5174A be amended to include "WHEREAS, the 2020 U.S. Census identified the Metro population as 1,670,601, thereby establishing an average district population of 278,434". The motion carried by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

Councilor Rosenthal presented a second amendment to Ordinance No. 21-1469A to move (b) school districts to (g) in order to provide clarity on Metro's priorities for the redistricting process.

Deputy Councilor President Craddick called for a motion to amend Ordinance 21-1469A to move (b) school districts to (g).

A motion was made by Councilor Rosenthal, seconded by Councilor Lewis, that Resolution 21-5174A be amended to move (b) school districts to (g).

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

Seeing no further discussion on the topic, Deputy Council President Craddick moved on to the next agenda item.

A motion was made by Councilor Lewis, seconded by Councilor Gonzalez, that this Ordinance was adopted as amended. The motion carried by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

7. Adjourn to a Work Session

There being no further business, Deputy Council President Craddick adjourned the Metro Council Meeting at 11:28 p.m.

1. Call to Order and Roll Call

Deputy Council President Craddick called the Work Session to order at 11:45 a.m.

Present: 5 - Councilor Shirley Craddick, Councilor Christine Lewis, Councilor Juan Carlos Gonzalez, Councilor Mary Nolan, and Councilor Gerritt Rosenthal

Excused: 1 - Council President Lynn Peterson

2. Work Session Topics:

2.1 Supportive Housing Services Resolution Report

Deputy Council President Craddick introduced Patricia Rojas (she/her) and Nui Bezaire (she/her) to present on the topic.

Staff pulled up *Metro Regional Supportive Housing Services Powerpoint Presentation*.

Patricia introduced the presentation, explained the Affordable Housing Bond and Supportive Housing Services (SHS) and explained how this fits in their goal of ending

homelessness in the region.

Nui provided context for homelessness in the region, summarized causes of homeless and the scale of homelessness.

Patricia explained COVID's effects on homeless visibility in the region and impact reduction services. She then summarized SHS's projected year one goals and winter strategy and progress made with the Metro Affordable Housing Bond.

Nui explained that SHS is building a system of care to eliminate homelessness and summarized shelter's role in the housing crisis response system by looking at how many shelter beds are needed in a community, who shelter serves and where people go after shelters. Nui then looked at outflow of homelessness and into housing by looking at, factors that effect outflow, how outflow can effect shelter availability, stressed the importance of balance between shelter inflow and outflow, highlighted the regional shelter capacity by county, and summarized strategies for how SHS is bringing resources to meet the needs of homeless individuals.

Patricia highlighted Metro owned sites that could be used for shelter purposes and explained three staff recommendations for Council.

Patricia responded to Councilor Nolan's question by stating that she is confident that SHS is moving in the right direction towards ending homelessness, however there are a number of significant factors that could make it more difficult to get to homelessness to functional zero.

Patricia responded to Councilor Gonzalez's question by explaining that she does not know what number of people SHS will be able to help who are outside right now but Patricia highlighted that SHS increasing shelter capacity by 40% will have a significant impact on helping people this winter.

Council Discussion

Deputy Council President Craddick requested that Federal, State and Tribal Affairs Legislative Agenda be tabled to a future date in the interest of time and summarized Patricia and Nui's presentation.

Councilor Nolan asked staff if they are confident that Metro is on a path that gets the region to functional zero for homelessness within 10 years.

Councilor Gonzalez asked staff how many people are Metro going to be able to serve who are outside right now, stressed the importance of getting the tri-county regional advisory committee up and running and asked about timing for other supportive services like mental health and drug addiction support.

Councilor Lewis expressed that the lack of coordination within the region to get available eviction prevention dollars out to those that need them is a major problem and stated that she would like more information about how many people are providing supportive services.

Councilor Nolan agreed with Councilor Lewis' comments about the importance of coordination within the region and stressed the importance of recognizing individuals who are at risk of becoming homeless. Councilor Nolan also asked

staff about the costs to perform a PIT count so Metro can have more accurate data and thanked staff for the work and presentation.

Deputy Council President Craddick requested that this discussion continue at a later date and explained the community needs more information about Metro’s plans to limit homelessness. Seeing no further discussion on the topic, Deputy Council President Craddick moved on to the next agenda item.

2.2 Federal, State and Tribal Affairs Legislative Agenda

Deputy Council President Craddick requested that Federal, State and Tribal Affairs Legislative Agenda be tabled to a future date.

3. Chief Operating Officer Communication

There were none.

4. Councilor Communication

There were none.

5. Adjourn

There being no further business, Deputy Council President Craddick adjourned the Metro Work Session at 12:55 p.m.

Respectfully submitted,

Stellan Roberts

Stellan Roberts, Legislative Assistant

Revised 10/19 This Council Meeting will adjourn to a Work Session.



Council meeting action update

Thursday, October 21, 2021

10:30 AM

<https://zoom.us/j/615079992> or
888-475-4499 (toll free)

1. Call to Order and Roll Call

Present: 5 - Councilor Shirley Craddick, Councilor Christine Lewis, Councilor Juan Carlos Gonzalez, Councilor Mary Nolan, and Councilor Gerritt Rosenthal

Excused: 1 - Council President Lynn Peterson

4. Consent Agenda

A motion was made by Councilor Lewis, seconded by Councilor Rosenthal, to adopt items on the consent agenda. The motion passed by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

4.1 Consideration of the Council Meeting minutes for September 23, 2021.

5. Resolutions

5.1 Resolution No. 21-5210, For the Purpose of Declaring a Vacancy in the Office of Metro Councilor for Council District No. 6

A motion was made by Councilor Rosenthal, seconded by Councilor Lewis, that this Resolution was adopted. The motion carried by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

6. Ordinances (Second Reading)

Revised 10/19 This Council Meeting will adjourn to a Work Session.

- 6.1 Ordinance No. 21-1469A, For the Purpose of Establishing Criteria for Metro Council District Reapportionment and Declaring an Emergency

A motion was made by Councilor Lewis, seconded by Councilor Gonzalez, that this Ordinance was adopted. The motion carried by the following vote:

Aye: 5 - Councilor Craddick, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Excused: 1 - Council President Peterson

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF October 21, 2021

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1.0	PowerPoint	10/21/21	Supportive Housing Services Resolution Report Presentation PowerPoint	102121c-01
2.0	PowerPoint	10/21/21	Ordinance No. 21-1469A Proposed Amendments PowerPoint	102121c-02

Agenda Item No. 3.2

Resolution No. 21-5208, For the Purpose of Approving the PERS Contribution for Marissa
Madrigal, Chief Operating Officer
Consent Agenda

Metro Council Meeting
Thursday, November 04, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE) RESOLUTION NO. 21-5208
PERS CONTRIBUTION FOR MARISSA)
MADRIGAL,CHIEF OPERATING OFFICER) Introduced by Council President Lynn
) Peterson

WHEREAS, pursuant to Chapter V, Section 25 of the Metro Charter and Section 2.20.020 of the Metro Code, the Metro Council President has the authority to appoint the Chief Operating Officer subject to confirmation of the Metro Council; and

WHEREAS, Metro Code Section 2.20.060 provides that the Chief Operating Officer shall receive such compensation as the Council shall fix by contract; and

WHEREAS, pursuant to Resolution No. 20-5084, the Metro Council appointed Marissa Madrigal as the Chief Operating Officer for Metro on February 27, 2020; and

WHEREAS, the employment contract for Marissa Madrigal provides that she shall be entitled to benefits under the same terms and conditions as provided for Metro’s non-represented employees; and

WHEREAS, Metro has decided to pay the six percent contribution to the Individual Account Plans of all non-represented employees eligible for the Public Employees Retirement System (PERS) effective June 28, 2021; and

WHEREAS, the Council finds that Marissa Madrigal should receive the benefit of the PERS contribution consistent with other PERS-eligible, non-represented employees of Metro; now therefore

BE IT RESOLVED by the Metro Council:

Extends the non-represented employee benefit of the PERS contribution to Marissa Madrigal, and thereby and approves Metro to pay the six percent contribution to Marissa Madrigal’s PERS Individual Account Plan.

ADOPTED by the Metro Council this 4th day of November 2021

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Agenda Item No. 4.1

Resolution No. 21-5212, For the Purpose of Authorizing an Exemption from Competitive Bidding and Procurement of Construction Manager/General Contractor Services by Competitive Request for Proposals for the Arlene Schnitzer Concert Hall City Sewer Connection Project
Resolutions

Metro Council Meeting
Thursday, November 04, 2021

BEFORE THE METRO CONTRACT REVIEW BOARD

FOR THE PURPOSE OF AUTHORIZING AN) RESOLUTION NO. 21- 5212
EXEMPTION FROM COMPETITIVE)
BIDDING AND PROCUREMENT OF) Introduced by Chief Operating
CONSTRUCTION MANAGER/GENERAL) Officer Marissa Madrigal in
CONTRACTOR SERVICES BY) concurrence with Council President
COMPETITIVE REQUEST FOR) Lynn Peterson
PROPOSALS FOR THE ARLENE)
SCHNITZER CONCERT HALL CITY)
SEWER CONNECTION PROJECT)

WHEREAS, Metro must disconnect the Arlene Schnitzer Concert Hall from its existing private sanitary sewer line and connect to the City of Portland’s existing sanitary sewer line located under Salmon Street (the “Arlene Schnitzer Concert Hall City Sewer Connection Project”); and

WHEREAS, ORS 279C.335 and Metro Local Contract Review Board Administrative Rule ("LCRB Rule") 49-0130 require that all Metro public improvement contracts be procured based on competitive bids, unless exempted by the Metro Council, sitting as the Metro Contract Review Board; and

WHEREAS, Metro's LCRB Rule 49-0620 authorizes the Metro Contract Review Board to exempt a public improvement contract from competitive bidding and direct the appropriate use of alternative contracting methods that take account of market realities and modern innovative contracting and purchasing methods, so long as they are consistent with the public policy of encouraging competition, subject to the requirements of ORS 279C.335; and

WHEREAS, ORS 279C.335 (2) and (5)(a), and LCRB Rules 49-0630 through 49-0690 require that the Metro Contract Review Board hold a public hearing and adopt written findings establishing, among other things, that the exemption of a public improvement contract from competitive bidding is unlikely to encourage favoritism or substantially diminish competition for public improvement contracts; and that said exemption will likely result in substantial cost savings to Metro; now therefore.

BE IT RESOLVED THAT THE METRO CONTRACT REVIEW BOARD:

1. Exempts from competitive bidding the procurement and award of a Construction Manager/General Contractor (“CM/GC”) public improvement contract for the construction of the Arlene Schnitzer Concert Hall City Sewer Connection Project; and
2. Adopts as its findings in support of such exemption the justification, information and reasoning set forth on the attached Exhibit A, which is incorporated herein by reference as if set forth in full; and

3. Authorizes the Chief Operating Officer to:

3.1 Prepare a form of Request for Proposals for CM/GC Contractor services that includes the following evaluation criteria for contractor selection:

- Contractor's proposed fees for pre-construction services;
- Contractor's proposed overhead and profit for construction services;
- Contractor's Project understanding and proposed project approach;
- Contractor's record of completion of projects of similar type, scale and complexity, including demonstrated public improvement CM/GC project experience and expertise;
- Contractor's record of coordinating multi-disciplinary approaches to value engineering challenges;
- Contractor's record of working with owners and design professionals to identify ways to incorporate long-term operational efficiencies into projects;
- Contractor's proposed milestone dates, including but not limited to substantial completion;
- Contractor's demonstrated quality and schedule control;
- Contractor's financial capacity;
- Contractor's sources of supply;
- Contractor's experience in incorporating sustainability construction practices and design into projects;
- Contractor's demonstrated commitment to workforce diversity and record of use of subcontractor businesses certified by the Certification Office of Business Inclusion and Diversity (COBID);
- Any other criteria that ensure a successful, timely, and quality project, in the best interest of Metro and in accord with ORS 279C.335(4)(c) and LCRB Rule 49-0640(2)(a) and (b);

3.2 Following the approval of said form of Request for Proposals and Contract by the Office of the Metro Attorney, to issue said form, and thereafter to receive responsive proposals for evaluation; and

3.3 Following evaluation of the responses to the Request for Proposals, authorizes the Chief Operating Officer to execute a CM/GC contract with the most advantageous proposer to construct the Arlene Schnitzer Concert Hall City Sewer Connection Project.

ADOPTED by the Metro Council this 4th day of November, 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

EXHIBIT A

Findings in Support of an Exemption from Competitive Bidding and Authorizing the Procurement by RFP of General Construction Services for Arlene Schnitzer Concert Hall City Sewer Connection

Pursuant to ORS 279C.335 (2) and (4), and Metro Local Contract Review Board (LCRB) Administrative Rule 49-0630, the Metro Contract Review Board makes the following findings in support of exempting the procurement of the Arlene Schnitzer Concert Hall City Sewer Connection from competitive bidding, and authorizing use of an RFP solicitation for a Construction Manager General Contractor (“CM/GC”) public improvement construction contract:

A. The exemption is unlikely to encourage favoritism or substantially diminish competition.

The Metro Contract Review Board finds that exempting the procurement of the construction of the Arlene Schnitzer Concert Hall City Sewer Connection from competitive bidding is “unlikely to encourage favoritism in the awarding of public contracts or to substantially diminish competition for public contracts” as follows: The RFP will be formally advertised with public notice and disclosure of the alternative contracting method and will be made available to all qualified contractors. Award of the contract will be based on the identified selection criteria and dissatisfied proposers will have an opportunity to protest the award. Full and open competition based on the objective selection criteria set forth in the Metro Contract Review Board resolution will be sought, and the contract will be awarded to the most advantageous proposer. Competition for the RFP will be encouraged by: Posting on ORPIN (Oregon Procurement Information Network), public advertisements placed in the Portland Business Tribune and other minority business publications; performing outreach to local business groups representing minorities, women, and emerging small businesses and by contacting contractors known to Metro to potentially satisfy the RFP criteria. The subcontractor selection process will be a low bid competitive method for contracts by requiring a minimum of three bids per scope, unless there is an approved exception. Competition among subcontractors will be encouraged by: contacting local subcontractors, including COBID firms and notifying them of any opportunities within their area of expertise and by performing outreach to local business groups representing minorities, women, and emerging small businesses.

B. The exemption will likely result in substantial cost savings to Metro.

The Metro Contract Review Board finds that exempting the procurement of the construction of the Arlene Schnitzer Concert Hall City Sewer Connection from competitive bidding will likely result in substantial costs savings to Metro, considering the “type, cost and amount of the Contract,” the 14 factors required by ORS 279C.335(2)(b), and the “additional findings” per Metro Local Contract Review Board (LCRB) Administrative Rule 49-0630(3)(B) as follows:

C. Type, Cost and Amount of the Contract: (type of project, budgeted/expected overall cost (of project), budgeted/expected contract amount)

The Arlene Schnitzer Concert Hall City Sewer Connection is a time-sensitive complex infrastructure modernization-adaptation project occurring during a period of sever and continuing labor and supply

chain shortages. This requires Contractor constructability review during design and engineering to avoid project delays and expensive project amendments resulting from hidden or unplanned for site conditions and unanticipated materials and equipment shortages. The rough-order-of-magnitude estimate for the entire project is \$1 million.

14 Statutory Factors

- 1. Number of entities available to bid:** The complex site logistics and requirements to continue business/performances in the building during construction are likely to discourage bidders from participating in a traditional design-bid-build process. Additionally, the type of work involved, pumping raw sewage underneath the audience chamber and stage area of the building above, present elevated risks to a low bid contractor. The opportunity to partner with the architecture and engineering team and perform investigative early work is likely to encourage more subcontract bidders.
- 2. Construction budget and future operating costs:** Utilizing an RFP process to select a General Contractor will allow Metro to obtain cost reductions through pre-construction services by the Contractor during the design phase, including a constructability review, value engineering, and other services. Involving the Contractor early in the design process fosters teamwork that results in a better design, fewer change orders, and faster progress with fewer unexpected delays, resulting in lower costs to Metro. The ability to have the General Contractor do early work prior to completion of design shortens the overall duration of construction, resulting in less disruption and risk to revenue generation Portland's and its clients. Faster progress and an earlier completion date will also help Metro avoid the risk of inflationary increase in materials and construction labor costs.

Contractor constructability review also allows for an ongoing review of the long term operating costs of design options, allowing for midcourse design choices, leading to a project having lower long term operating maintenance and repair costs.

- 3. Public Benefits:** The execution of the project by using the CM/GC process will allow the procurement and contracting schedule to be compressed providing more working time to cope with the supply chain issues and labor shortages affecting the construction industry. In addition to the public benefits from the cost savings noted above, the procurement of a CM/GC construction contract through the RFP process will help realize Metro's goal of obtaining COBID participation by enabling a qualitative review of proposers' approach to COBID outreach and mentoring partnerships.
- 4. Value Engineering:** The process will enable the Contractor to work with the Project Engineer and Portland's staff to help reduce construction costs by providing early input and constructability review to designers, avoiding costly redesign and change orders, and providing opportunities for the engineers and Contractor to work together on both practical and innovative solutions to complex design issues. This type of contract will allow the engineers to more easily explore, with the Contractor, the feasibility of innovative design solutions and incorporate ongoing value engineering.

5. **Specialized Expertise Required:** In addition to prior experience with septic pump construction, specialty acoustic pipe installation, controls, and subterranean plumbing connections, contractor and subcontractors, must be able to demonstrate in their proposal that they have worked in a busy urban area and understand the logistics of traffic control, access, removing demolished materials, etc. The selection of a contractor with such specialized expertise to construct the project will result in a substantially lower risk to Metro, because it increases the likelihood of the project being completed on schedule, resulting in lower costs and increased benefit to the community. The ability to factor expertise and experience into contractor selection is inherent in the RFP process, but is not part of the traditional low bid process.
6. **Public Safety:** The work being done directly underneath the audience chamber and stage house could impact public safety if not performed with a level of expertise that can be ensured with a qualifications based selection.
7. **Reduces risk to Metro and the public.** The risks to Portland's ongoing operations and contracting posed by the inability of the contractor to meet the schedule deadlines will be reduced by the selection of the contractor based on the demonstrated ability to perform the work as specified, rather than awarding the project to the low bidder.
8. **Exemption's effect on funding:** Does not apply.
9. **Better Control of Impact of Market Conditions on Cost and Time to Complete:** Engaging the Contractor during the design and specification process will allow more nimble reaction to the current supply chain and labor shortage issues being experienced by the construction industry. Materials and equipment choices can be evaluated not only on cost, but also based on availability and lead times. Subcontractors are more likely to bid and commit workforce to General Contractors who can demonstrate that they are already under contract for projects.
10. **Technical complexity:** The exemption will allow the Contractor to pre-qualify/select subcontractors that have demonstrated technical expertise, knowledge, and experience with the logistical challenges of demolition and construction in a compressed urban site, all of which can be factored into the contractor selection in the RFP process. The selection of a contractor with demonstrated experience and success in implementing similar projects will result in a substantially lower risk to Metro, because it increases the likelihood of the project being completed on budget, with fewer construction delays and change orders, resulting in lower costs and increased benefit to the community. The RFP process will take into account each contractor's past performance and technical knowledge. Based on the necessary quality of the finished project, the risks to operations of a project containing construction defects, and the technical complexity of the undertaking, the Procurement Manager believes an alternative contracting process to be necessary and in the best interest of the agency.
11. **New construction, renovation or remodel:** The scope of infrastructure replacement work has the potential to impact the comfort, safety, and of Portland's staff, clients, and customers. Some of the design limitations and conditions are likely to be unknown until uncovered by work performed

under an early work amendment, which can be performed during design development to inform the design process.

12. **Occupancy during construction:** The building will remain occupied during the construction period. Improper execution of the work could require cancellation of rehearsals, performances, and operational work, resulting in a loss of revenue for Portland's, clients, and staff.
13. **Phased Construction Work:** The final phase of the work must be done during a two-week period without performances or events, and this period must be blocked out months in advance. Failure to have the earlier phases complete by the committed "dark" period in late August 2022, will impact and, potentially, cause currently scheduled performances and events to be cancelled. Additionally, this work is a prerequisite to a larger project being done by the City of Portland, which would in turn experience schedule delays if phased goals are not met. Having the Construction Manager work together with the Project Engineer during the design process to plan an executable phased approach makes it more likely that the project will meet its schedule goals and avoid disrupting operations.
14. **Availability of personnel, consultant and legal counsel with CM/GC expertise.** The Office of Metro Attorney, Project Manager, and Project Engineer have the necessary qualifications and expertise to negotiate, administer, and enforce the terms of Metro's CM/GC public improvement contract, including prior experience governing large CM/GC projects and managing them to a successful completion.

Additional Findings:

1. **Industry practices, surveys, trends.** The industry-accepted benefits of the CM/GC method include:
 - Results in a better design that meets the owner's objectives;
 - Encourages competition, especially for COBID subcontractors;
 - Can be completed in a faster time frame;
 - Costs less than a design-bid-build project that is designed and constructed in the traditional manner;
 - Reduces the risks of delays, cost overruns, and disputes;
 - Limits the number of change orders for unforeseen conditions.
2. **Past experience and evaluation of Metro CM/GC projects.**

The Arlene Schnitzer Concert Hall ("ASCH") Acoustic Enhancement Project recently reached completion. The benefits to the ASCH Acoustic Project achieved through the CM/GC process include:

 - Portland's obtained cost reductions through pre-construction services by the Contractor during the design phase, including a constructability review (e.g., materials, phasing, layout and design) and value engineering.
 - Close cooperation between the architect and Contractor allowed for rapid and successful solutions to challenges proposed by prior unknown conditions in the 92 year-old facility.
3. **Benefits and drawbacks of CM/GC to the Project.** The CM/GC method provides an invaluable means of addressing the risks to Metro presented by the project's site conditions and timeline including:

- Facility must remain open and operational, and the activity will take place underneath the audience chamber and stage house.
- Widespread public access and need to preserve a quality experience to maintain current revenues.
- Need to complete initial phases of the work in order to meet deadline posed by scheduled “dark” period.
- Potentially unknown conditions at sub-basement building level and subterranean sidewalk levels can be discovered and addressed in the pre-construction period, avoiding schedule delays and costly change orders.

By involving the Contractor extensively during the design process, Portland’5 will be able to better account for, plan around, and address the above factors prior to and during construction. This avoids project delays and expensive change orders, helps to reduce liability and revenue risks to Metro, and provides a foundation of cooperation upon which a high-quality result may be achieved, on schedule and on budget. Pre-construction services provided during the process include a constructability review, value engineering, and other service during design. Involving a Contractor during the design fosters teamwork that results in a better design, faster progress with fewer delays, and less costs.

Given Metro’s favorable experience with CM/GC, staff foresees no drawbacks to adopting the CM/GC method to implement the Arlene Schnitzer Concert Hall City Sewer Connection Project.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 21-5212, FOR THE PURPOSE OF AUTHORIZING AN EXEMPTION FROM COMPETITIVE BIDDING AND PROCUREMENT OF CONSTRUCTION MANAGER/GENERAL CONTRACTOR SERVICES BY COMPETITIVE REQUEST FOR PROPOSALS FOR THE ARLENE SCHNITZER CONCERT HALL CITY SEWER CONNECTION

Date: November 4, 2021

Prepared by: Nancy Strening

BACKGROUND

Beginning in late 2021, the City of Portland Environmental Services Department will be starting a project to upgrade hundreds of miles of underground sewer pipes. This project will impact the Arlene Schnitzer Concert Hall (the "Schnitzer") because it is connected to an old private sewer line, for which the City has no responsibility. The City's Project will effectively disable this existing line. The City requires the Schnitzer sanitary system to be connected to the existing City line that is running under Salmon street, approximately 25 feet above the current line.

MFIA Engineering has studied the conditions extensively, has made design recommendations, and is the process of design development for the Project.

The Scope of Work includes re-routing the internal sanitary piping to a new tank and pump assembly in the lower level mechanical room, and providing a new pressurized, insulated pipe which will run underneath the audience chamber and stage house to connect with the approved City connector line running underneath Salmon street. Access to the mechanical room is very limited, thus the tank must be built on site. The facility must remain in operation during the Project.

A qualifications based alternative procurement method, a Request for Proposals, will enable Metro to specifically request and qualitatively evaluate proposers' prior experience with the unique parameters of the Project, including experience with tight city sites, exposure to and expertise in septic tank and pump systems, demonstrated successes with compressed schedules, keeping staff, clients and the public safe and comfortable during the Project, and their approach to the COBID outreach and partnership and workforce diversity. Further, this procurement method has proven to be a more effective way for public agencies to increase the use of COBID firms in sub-contracting opportunities.

The Arlene Schnitzer Concert Hall City Sewer Connection is a time-sensitive complex infrastructure modernization- project occurring during a period of severe and continuing labor and supply chain shortages. The execution of the project by using the CM/GC project

delivery method will allow the procurement and contracting schedule to be compressed, providing more working time to cope with the supply chain issues and labor shortages affecting the construction industry. The complexity of the Project demands Contractor constructability review and value engineering during design to avoid project delays and expensive project amendments resulting from hidden or unplanned-for site conditions. Involving the Contractor early in the design process will foster teamwork and result in a better design, fewer change orders, and faster progress with fewer unexpected delays, resulting in lower costs to Metro. Contractor constructability review during engineering also provides for design adjustments to address the long term operating costs of various design options, leading to a project having lower long term operating maintenance and repair costs. Finally, faster progress and an earlier completion date will also help Metro avoid the risk of inflationary increases in materials and construction labor costs.

The attached Resolution and Findings in Exhibit A describe the specialized nature of this Project. Based on these Findings, the Metro Procurement Manager believes that a value-based selection process is more appropriate than a traditional, competitive bid (which solely considers lower bid price). Portland's, cPMO staff, and the Office of the Metro Attorney concur.

Therefore, staff seeks Council authorization to pursue the alternative procurement of Construction Manager/General Contractor Services by a competitive Request for Proposals, for the Arlene Schnitzer Concert Hall City Sewer Connection. This will allow Metro to consider cost as well as experience and expertise in completing similar projects and in selecting the most advantageous contractor for this Project.

ANALYSIS/INFORMATION

1. **Known Opposition.** None
2. **Legal Antecedents.** LCRB Rule 49-0620(1), 49-0130, 49-0630, 49-0640, and 49-0690; Oregon Revised Statutes 279C.335 and ORS 279C.337.
3. **Anticipated Effects.** Public procurement process will be open and competitive, but items other than cost will be considered in the awarding of the contract. Increased use of COBID subcontractors is anticipated.
4. **Budget Impacts.** The Request for Proposals process offers safeguards for schedule and cost control of the Project, including early involvement by construction contractor in the design process, as well as limited change orders.

RECOMMENDED ACTION

Metro Council, acting as the Local Contract Review Board, approves an exemption from competitive bidding for the Arlene Schnitzer Concert Hall City Sewer Connection, and authorizes procurement of a Construction Manager/General Contractor by request for competitive proposals, and authorizes the execution of the resulting Construction

Manager/General Contractor contract by the Chief Operating Officer in a form to be approved by the Office of Metro Attorney.

Agenda Item No. 4.2

Resolution No. 21-5205, For the Purpose of Amending the 2021-26 Metropolitan Transportation Improvement Program (MTIP) to Amend or Add Approximately 13 Projects Impacting Metro, Oregon Department of Transportation, Portland, And Tualatin Hills Parks and Recreation District Ensuring Required Federal Approvals and Phase Obligations Can Move Forward (OC22-01-OCT)
Resolutions

Metro Council Meeting
Thursday, November 04, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO AMEND OR ADD APPROXIMATELY 13 PROJECTS IMPACTING METRO, ODOT, PORTLAND, AND THPRD ENSURING REQUIRED FEDERAL APPROVALS AND PHASE OBLIGATIONS CAN MOVE FORWARD (OC22-01-OCT))	RESOLUTION NO. 21-5205
)	Introduced by: Chief Operating Officer
)	Marissa Madrigal 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 2021-26 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, Portland has completed their required pre-scoping for two of their Metro awarded Transportation Systems Management and Operations (TSMO) projects allowing MTIP and State Transportation Improvement Program (STIP) programming to occur and initiate the required ODOT intergovernmental agreement development enabling the projects to be implemented ; and

WHEREAS, Metro has received a \$850,000 Federal Transit Administration (FTA) Helping Obtain Prosperity for Everyone (HOPE) planning grant for the Tualatin Valley Hwy Transit & Development Project which will complete corridor planning including developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project, alternative analysis for a preferred alignment, plus evaluate street and pedestrian improvements for future construction projects; and

WHEREAS, Tualatin Hills Parks and Recreation District received a \$572,477 Oregon Community Paths Program grant which will support completion of Westside Trail Project Refinement Study to identify the preferred alignment and master plan for segments 14-17 of the trail to lay the foundation for closing a critical 2.3 mile gap in Washington County; and

WHEREAS, the formal amendment will add four new safety improvement projects for ODOT to construct new curbs and ramps to Americans with Disabilities Act (ADA) standards at various locations on OR10, OR47, OR99E, US30, and US30BY to reduce mobility barriers and make state highways more accessible to disabled persons; and

WHEREAS, ODOT is combining two safety improvement projects into a single project for increased delivery efficiencies on OR8 which will install larger signal heads, reflective backboards, and pedestrian countdown signals between SW Short Ave - SW 110th, plus will include sidewalk infill and improvements, bus stop relocations, bus pads, and enhanced pedestrian crossing between SW 192nd Ave-SW 165th Ave; and

WHEREAS, ODOT is combining another two safety projects into a single project for increased delivery efficiencies on US30 between NW Hoge Ave and Watson Rd to repair culverts in poor condition along this corridor to prevent further damage and possible collapse; 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 October 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 as a result of the October 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 October 1, 2021; and

WHEREAS, JPACT approved Resolution 21-5205 consisting of the October 2021 Formal MTIP Amendment bundle on October 21, 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 November 4, 2021 to formally amend the 2021-26 MTIP to include the required changes identified in the October 2021 Formal MTIP Amendment Bundle and Resolution 21-5205.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

2021-2024 Metropolitan Transportation Improvement Program
 Exhibit A to Resolution 21-5205



Proposed October 2021 (FFY 2022) Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **OC22-01-OCT**
 Total Number of Projects: 13

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Project #1 Key 20885	Metro	Transportation System Mgmt Operations/ITS (2020)	Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)	<u>SPLIT FUNDS:</u> Split and reduce STBG-U funds by \$846,333 and commit to Portland’s new awarded TSMO projects also part of this amendment bundle (projects #2 and #3 that follow)
Project #2 Key New TBD	Portland	Traffic Signal Communication Improvements: Holgate Blvd & 92nd Ave	Install traffic signal controller communication improvements to up to 7 signal locations on SE Holgate Blvd and 92nd Ave for increased safety and service to motorists	<u>ADD NEW PROJECT:</u> The formal amendment adds the new Metro TSMO awarded project which will provide traffic signal controller improvements at locations on Holgate Blvd and 92nd Ave
Project #3 Key New TBD	Portland	Portland Traffic Signal Performance Measures Development & Eval	Across Portland, develop and validate new required Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new Metro TSMO awarded project which will develop and evaluate traffic signal performance measurements
Project #4 Key New TBD	Metro	Tualatin Valley Hwy Transit & Development Project	Complete corridor planning including developing an equitable development strategy (EDS), a locally preferred alternative (LPA) for a transit project, an alternative analysis for a preferred alignment for future construction of pedestrian improvements.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new OR8 corridor study that includes a FTA HOPE grant.

Project #5 Key 22475 New	Tualatin Hills Parks and Recreation District	Westside Trail Project Refinement	Project refinement study to lay the foundation for closing a critical 2.3-mile gap in the Westside Trail between SW Walker Rd and NW Kaiser Rd in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new Oregon Community Paths Program FY 2021-24 Awarded project to Tualatin Hills Parks and Recreation District (ODOT managed program)
Project #6 Key 22435 NEW	ODOT	OR47/OR8/US30 Curb Ramps	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR47, OR8, and US30 to reduce mobility barriers and make State Highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #7 Key 22468 NEW	ODOT	US30BY curb ramps group A: N Greeley Ave - I-5 (Portland)	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along US30BY to reduce mobility barriers and make state highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #8 Key 22469 NEW	ODOT	OR99E curb ramps group A: SE Woodward St - Oregon City	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR99E to reduce mobility barriers and make state highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #9 Key 22470 NEW	ODOT	OR10 curb ramps group A: SW 198th Ave – SW Kinnaman Rd	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR10 to reduce mobility barriers and make state highways more accessible to disabled persons.	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #10 Key 22440 NEW	ODOT	NW 112th Street and PNWR rail crossing upgrades	Add active warning devices to the railroad-highway crossing at NW 112th Ave and Portland & Western Railroad thereby decreasing the probability of future rail crossing incidents at the crossing which is situated in an industrial tank farm area mixed with residences, truck traffic, and trains carrying hazardous liquids and gases.	<u>ADD NEW PROJECT:</u> The formal amendment adds a new rail safety improvement project for ODOT

<p>Project #11 Key 18794</p>	<p>ODOT</p>	<p>OR8: SW Short Ave – SW 110th Ave (Beaverton) OR8: SW 192 Ave - SW 110th Ave</p>	<p>Safety upgrades to install larger signal heads- reflective backboards- pedestrian countdown signals and left turn phasing where feasible Install larger signal heads, reflective backboards, pedestrian countdown signals and other signal improvements to increase safety on SW Short Ave - SW 110th Ave. Sidewalk infill and improvements, bus stop relocations, bus pads, and enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave.</p>	<p><u>COMBINED PROJECT:</u> The formal amendment combines a prior obligated construction phase from Key 18839 into Key 18794 for increased delivery efficiencies as a single project</p>
<p>Project #12 Key 21779</p>	<p>ODOT</p>	<p>US30: Watson Rd - NW Hoge Ave</p>	<p>Repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse.</p>	<p><u>SPLIT/CANCEL PROJECT:</u> The formal amendment splits the scope and funding and combines it into Key 21128 – also included in this amendment bundle. As a result Key 21779 is zero programmed</p>
<p>Project #13 Key 21128 New</p>	<p>ODOT</p>	<p>US30: CORRIDOR (MP 9.08 TO 17.68) US30: Watson Rd - Hoge Ave</p>	<p>New Combined Project Description: Repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse</p>	<p><u>ADD AND COMBINE PROJECT:</u> The formal amendment re-adds Key 21128 into the 2021-26 MTIP and includes combing the scope and funding from Key 21779</p>



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

Formal Amendment
SPLIT FUNDS
 Split \$846,333 and commit to
 Portland's new TSMO projects

Lead Agency: Metro		Project Type:	TSMO/ITS		ODOT Key:	20885
Project Name: Transportation System Mgmt Operations/ITS (2020)	1	ODOT Type	N/A		MTIP ID:	70875
		Performance Meas:	No		Status:	0
Project Status: 0 = No activity. Note: Key 20885 functions as an approved TSMO/ITS revenue PGB supporting Metro awarded TSMO/ITS projects		Capacity Enhancing:	No		Comp Date:	9/30/2026
		Conformity Exempt:	Yes		RTP ID:	11104
Short Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)		On State Hwy Sys:	No		RFFA ID:	50361
		Mile Post Begin:	N/A		RFFA Cycle:	2019-21
		Mile Post End:	N/A		UPWP:	No
		Length:	N/A		UPWP Cycle:	N/A
		Flex Transfer to FTA	No		Transfer Code	N/A
		1st Year Program'd:	2020		Past Amend:	3
		Years Active:	2		OTC Approval:	No
		STIP Amend #:	TBD		MTIP Amnd #:	OC22-01-OCT
Detailed Description: Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee; allocation and implementation of MTIP programming for TSMO; manage regional policy and project development; and oversee performance data development and tracking. (FY 2020 allocation year)						
STIP Description: N/A - Project is programmed in FY 2025 and outside the current STIP years						

Last Amendment of Modification: Formal - June 2021 -JN21-11-JUN - SPLIT/COMBINE PROJECT: The formal amendment splits \$233,747 of STBG and required match to ODOT's new ATC project (included in this amendment bundle). The programming years are being pushed-out to FY 2025 as well to avoid conflicts with the Obligation Targets program.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
STBG-U	Z230	2025	-				\$ 1,510,851	\$ -
STBG-U	Z230	2025					\$ 664,518	\$ 664,518
								\$ -
							Federal Totals:	\$ 664,518
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2025					\$ 172,924	\$ -
Local	Match	2025					\$ 76,057	\$ 76,057
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 76,057
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 1,683,775	\$ 1,683,775
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 740,575	\$ 740,575
Year Of Expenditure (YOE):								\$ 740,575

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Add new TSMO awarded project to the MTIP.
- > Support Materials: Current MTIP Programming page in FFY 2025

Amendment Summary:

The formal amendment splits \$846,333 of STBG from the PGB and commits the funds to the two new Metro awarded TSMO/ITS projects for Portland which are part of this amendment bundle. The awarded funds originate from the 2021 TSMO funding allocation. The source of the STBG funds for Key 20885 are from the RFFA Step 1 allocation from the FY 2020 allocation year.

- > Will Performance Measurements Apply: No

RTP References:

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

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion allocated by formula to the MPOs. The funds are applied to eligible projects and activities or used to support local project needs through the discretionary funding calls.
- > Local = General local funds provided by the lead agency as part of the required match.

Other

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

2021-2026 Metropolitan Transportation Improvement Program (MTIP)
 Current Approved Project List with Approved Amendments



LEAD AGENCY		Metro				
PROJECT NAME		Transportation System Mgmt Operations/ITS (2020)				
Project IDs		Project Description				Project Type
ODOT KEY	20885	Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)				Transportation System Management Operations
MTIP ID	70875					
RTP ID	11104					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Other	2025	STBG-URBAN	\$1,510,851	\$172,924	\$0	\$1,683,775
FY 21-26 Totals			\$1,510,851	\$172,924	\$0	\$1,683,775
Estimated Project Cost (YOE\$)			\$1,510,851	\$172,924	\$0	\$1,683,775



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

Formal Amendment
ADD NEW PROJECT
 Add new Metro TSMO awarded project with STBG from Key 20885

Lead Agency: Portland		Project Type:	TSMO/ITS	ODOT Key: New -TBD
Project Name: Traffic Signal Communication Improvements: Holgate Blvd & 92nd Ave Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) Short Description: Install traffic signal controller communication improvements to up to 7 signal locations on SE Holgate Blvd and 92nd Ave for increased safety and service to motorists	2	ODOT Type:	TBD	MTIP ID: New - TBD
		Performance Meas:	Safety	Status: 2
		Capacity Enhancing:	No	Comp Date: 9/30/2026
		Conformity Exempt:	Yes	RTP ID: 11104
		On State Hwy Sys:	No	RFFA ID: N/A
		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:	2023	Past Amend: 0
		Years Active:	0	OTC Approval: No
		STIP Amend #:	TBD	MTIP Amnd #: OC22-01-OCT
		Detailed Description: Metro awarded TSMO Sub-allocation for FFY19-21 project with STBG funds from Key 20885 to Install traffic signal controller communication improvements to up to 7 signal locations on SE Holgate Blvd (72nd Ave to 112th) and 92nd Ave (SE Harold Ave to 91st PI) for increased safety and service to motorists. (RTP ID 11104. Exempt: 40 CFR 93.126, Table 2 - Traffic control devices and operating assistance other than signalization projects)		
STIP Description: TBD				

Last Amendment of Modification: None. Initial programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
STBG-U	Z230	2023					\$ 227,196	\$ 227,196
								\$ -
							Federal Totals:	\$ 227,196
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023					\$ 26,004	\$ 26,004
								\$ -
								\$ -
							Local Total	\$ 26,004
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 253,200	\$ 253,200
Year Of Expenditure (YOE):								\$ 253,200

Notes and Summary of Changes:

- > Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Add new TSMO awarded project tot eh MTIP.
- > Support Materials: Metro TSMO FY 2019-21 Funding Award Letter

Amendment Summary:

The formal amendment adds the Metro warded TSMO project to the 2021-26 MTIP. awarded funding is STBG-U and is draw from the TSMO Program project grouping bucket in 20885.

- > Will Performance Measurements Apply: Yes

RTP References:

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

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion allocated by formula to the MPOs. The funds are applied to eligible projects and activities or used to support local project needs through the discretionary funding calls.
- > Local = General local funds provided by the lead agency as part of the required match.

Other

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

Memo



Date: Jan. 2, 2020
To: TPAC and Interested Parties
From: Caleb Winter, TSMO Program Manager, Senior Transportation Planner
Subject: TSMO Sub-allocation for FFY19-21

Memo Purpose

Share TransPort's Transportation System Management and Operations (TSMO) project recommendations from the 2019 TSMO Project Solicitation (2019-2021 MTIP).

Overview

TransPort is the Subcommittee of TPAC that plays a key role in advancing TSMO projects. TransPort updates the criteria based on the current TSMO strategy and regional policy priorities. Metro leads the TSMO solicitation and review process. TransPort recommends projects for funding.

Lead agency	Project name	Project type	TSMO Federal Portion
City of Portland	Traffic Signal Communications	Data communications through fiber optics	\$227,196
City of Portland	Local Traffic Signal Controller Replacement	ATCs	\$840,435
City of Portland	Regional Traffic Signal System Performance Measures	Traffic Signal Performance Measures for Active Transportation	\$619,137
Clackamas County	Clackamas County Regional ATC controller & Signal Optimization Project	ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville	\$735,878



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

Formal Amendment
ADD NEW PROJECT
Add new Metro TSMO awarded
project with STBG from Key 20885

Lead Agency: Portland		Project Type: TSMO/ITS	ODOT Key: New -TBD
Project Name: Portland Traffic Signal Performance Measures Development & Eval Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) Short Description: Across Portland, develop and validate new required Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety.	3	ODOT Type: TBD	MTIP ID: New - TBD
		Performance Meas: Safety	Status: 2
		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 11104
		On State Hwy Sys: No	RFFA ID: N/A
		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: 2023	Past Amend: 0
		Years Active: 0	OTC Approval: No
		STIP Amend #: TBD	MTIP Amnd #: OC22-01-OCT
		Detailed Description: Metro awarded TSMO Sub-allocation for FFY19-21 project with STBG funds from Key 20885 to develop and validate across Portland new required ATSPMs supporting traffic signal controllers which will then be used to create metrics that can help optimize operations and streamline maintenance to evaluate signal performance providing motorists improved mobility, efficiency, and safety. (RTP ID 11104. Exempt: 40 CFR 93.126, Table 2 - Traffic control devices and operating assistance other than signalization projects)	
STIP Description: TBD			

Last Amendment of Modification: None. Initial programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
STBG-U	Z230	2023					\$ 619,137	\$ 619,137
								\$ -
							Federal Totals:	\$ 619,137
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023					\$ 70,863	\$ 70,863
								\$ -
								\$ -
							Local Total	\$ 70,863
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 690,000	\$ 690,000
Year Of Expenditure (YOE):								\$ 690,000

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 TSMO awarded project tot eh MTIP.
- > Support Materials: Metro TSMO FY 2019-21 Funding Award Letter + Completed draft Technical Scoping Sheet + Scope of Work narrative

Amendment Summary:

The formal amendment adds the Metro warded TSMO project to the 2021-26 MTIP. awarded funding is STBG-U and is draw from the TSMO Program project grouping bucket in 20885. The project is a Portland wide project to develop and evacuate Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety. \$619,137 in federal STBG-U funds have been awarded to the project from the 2019-21 TSMO Project Funding Call.

- > Will Performance Measurements Apply: Assumed yes with the ATSPMs being the ITS performance measurements used to support the RTP goals.

RTP References:

- > RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027
- > RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Traffic control devices and operating assistance other than signalization projects.
- > UPWP amendment: No. The project includes implementation beyond planning. This is not considered a planning project.
- > RTP Goals: Goal 4 - Reliability and Efficiency
- > Goal Objective: Objective 4.2 - Travel Management
- > Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion allocated by formula to the MPOs. The funds are applied to eligible projects and activities or used to support local project needs through the discretionary funding calls.
- > Local = General local funds provided by the lead agency as part of the required match.

Other

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

Memo



Date: Jan. 2, 2020
To: TPAC and Interested Parties
From: Caleb Winter, TSMO Program Manager, Senior Transportation Planner
Subject: TSMO Sub-allocation for FFY19-21

Memo Purpose

Share TransPort's Transportation System Management and Operations (TSMO) project recommendations from the 2019 TSMO Project Solicitation (2019-2021 MTIP).

Overview

TransPort is the Subcommittee of TPAC that plays a key role in advancing TSMO projects. TransPort updates the criteria based on the current TSMO strategy and regional policy priorities. Metro leads the TSMO solicitation and review process. TransPort recommends projects for funding.

Lead agency	Project name	Project type	TSMO Federal Portion
City of Portland	Traffic Signal Communications	Data communications through fiber optics	\$227,196
City of Portland	Local Traffic Signal Controller Replacement	ATCs	\$840,435
City of Portland	Regional Traffic Signal System Performance Measures	Traffic Signal Performance Measures for Active Transportation	\$619,137
Clackamas County	Clackamas County Regional ATC controller & Signal Optimization Project	ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville	\$735,878



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

Formal Amendment
ADD NEW PROJECT
 Add new TV Hwy/OR8 Corridor
 Planning and Development

Lead Agency: Metro		Project Type: Planning	ODOT Key: NEW - TBD
Project Name: Tualatin Valley Hwy Transit & Development Project	4	ODOT Type: TBD	MTIP ID: NEW-TBD
		Performance Meas: No	Status: 0
		Capacity Enhancing: No	Comp Date: 12/31/2024
		Conformity Exempt: Yes	RTP ID: UPWP
		On State Hwy Sys: No	RFFA ID: N/A
		Mile Post Begin: N/A	RFFA Cycle: N/A
		Mile Post End: N/A	UPWP: Yes
		Length: N/A	UPWP Cycle: SFY 22
		Flex Transfer to FTA: Yes	Transfer Code: 5307
		1st Year Program'd: 2022	Past Amend: 0
		Years Active: 0	OTC Approval: No
		STIP Amend #: TBD	MTIP Amnd #: OC22-01-OCT
		Project Status: 0 = No activity.	
Short Description: Complete corridor planning including developing an equitable development strategy (EDS), a locally preferred alternative (LPA) for a transit project, an alternative analysis for a preferred alignment for future construction of pedestrian improvements.			
Detailed Description: A two-year study through the OR8 corridor between Beaverton and Forest Grove in Washington County, complete various corridor development planning activities including developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project, alternative analysis for a preferred alignment, and evaluate potential street and pedestrian improvements (FTA HOPE grant award)			
STIP Description: TBD			

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
STBG-U	2230	2022	\$ 690,918					\$ 690,918
FTA Other (Hope)	HOPE	2022	\$ 850,000					\$ 850,000
								\$ -
Notes: FTA HOPE (Helping Obtain Prosperity for Everyone) Program Grant is set at 90% federal							Federal Totals:	\$ 1,540,918
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2022	\$ 79,079					\$ 79,079
Local	Match	2022	\$ 94,444					\$ 94,444
Local - WashCo	OTH0	2022	\$ 25,000					\$ 25,000
Other	OTH0	2022	\$ 784,282					\$ 784,282
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 982,805
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ 2,523,723	\$ -	\$ -	\$ -	\$ -	\$ 2,523,723
							Year Of Expenditure (YOE):	\$ 2,523,723

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 UPWP stand-alone project to the 2021-24 MTIP
- > Support materials: FTA HOPE grant award letter and project location map

Amendment Summary:

The formal amendment adds the new Tualatin Valley Hwy corridor planning project to the MTIP. The project is funded from multiple sources including a FTA HOPE grant and local contributions from Washington County. The project will complete corridor planning including developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project, alternative analysis for a preferred alignment, and evaluate street and pedestrian improvements.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: - N/A UPWP approved project
- > RTP Description: N/A
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: Yes, SFY 22 approved UPWP project
- > RTP Goals: Goal 11 Transparency and Accountability
- > Goal Objective: Objective 11.2 Performance-Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion .
- > FTA HOPE = Federal discretionary Helping Obtain Prosperity for Everyone grant program from FTA. Match requirement is set at 10% against a 90% federal share.
- > Local = General local funds provided by the lead agency as part of the required match.
- > Other = Local funds committed to the project above the required match to the federal funds.

Other

- > On NHS: Yes
- > Is this a project that requires transportation modeling: No
- > Is the project located on the Metro Model: Yes - The OR 8 corridor is identified in the Motor Vehicle, Pedestrian and Bicycle networks
- > Model category and type: Various
- > TCM project: No
- > Located on the CMP: Yes



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

Formal Amendment
ADD NEW PROJECT
 Add new THPRD Westside TR
 Refinement Study to MTIP

Lead Agency: Tualatin Hills Parks & Recreation District		Project Type:	Planning		ODOT Key:	22475
Project Name: Westside Trail Project Refinement	5	ODOT Type	TBD		MTIP ID:	NEW-TBD
		Performance Meas:	No		Status:	0
Project Status: 0 = No activity.		Capacity Enhancing:	No		Comp Date:	9/30/2024
		Conformity Exempt:	Yes		RTP ID:	10810 & 11405
Short Description: Project refinement study to lay the foundation for closing a critical 2.3 mile gap in the Westside Tr (SW Walker Rd and NW Kaiser Rd) in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.		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:	2022		Past Amend:	0
		Years Active:	0		OTC Approval:	Yes
		STIP Amend #: 21-24-0991			MTIP Amnd #:	OC22-01-OCT
Detailed Description: Oregon Community Paths Program FY 2021-24 Awarded project with federal funds to complete a project refinement study to lay the foundation for closing a critical 2.3-mile gap in the Westside Trail between SW Walker Rd and NW Kaiser Rd in Washington County (Segments 14-17). Identify the preferred alignment and master plan for this portion of the trail (May 2021 OTC Item I) (Exempt: Yes - Planning and Technical Studies)						
STIP Description: Project refinement study to lay the foundation for closing a critical 2.3-mile gap in the Westside Trail between SW Walker Rd and NW Kaiser Rd in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.						
Last Amendment of Modification: None. Initial MTIP programming						

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
AC-TAS	ACPO	2022	\$ 572,477					\$ 572,477
								\$ -
								\$ -
Notes: AC-TAS = Advance Construction with an expected conversion code of State Transportation Alternatives (TA)							Federal Totals:	\$ 572,477
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2022	\$ 65,523					\$ 65,523
								\$ -
								\$ -
								\$ -
							Local Total	\$ 65,523
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ 638,000	\$ -	\$ -	\$ -	\$ -	\$ 638,000
							Year Of Expenditure (YOE):	\$ 638,000

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 ODOT awarded project to the 2021-24 MTIP
- > Support materials: OTC item and staff report, Community Paths award letter, plus project location map

Amendment Summary:

The formal amendment adds the new ODOT Community Paths awarded project to the mtip. The project refinement study to lay the foundation for closing a critical 2.3 mile gap in the Westside Tr (SW Walker Rd and NW Kaiser Rd) (Segments 14-17) in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: - 10810, & 11405 - Westside Trail (Regional) Segments 14-17
- > RTP Description: To design and construct a regional trail multiuse segment. The trail may increase safety by creating 12' wide trail/sidewalk connecting to a road separated facility near high injury corridors and high injury intersections. Completing the trail gap increases access to jobs in a marginalized area.
- > Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Other - Planning and Technical Studies
- > UPWP amendment: No
- > RTP Goals: Goal 11 Transparency and Accountability
- > Goal Objective: Objective 11.2 Performance-Based Planning
- > Goal Description: Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Fund Codes:

- > AC-TAS = Federal Advance Construction used as a placeholder until the actual federal fund type code is determined. AC-TAS refers to the expectation the State Transportation Alternatives funds will be the final federal fund type code for the project.
- > Local = General local funds provided by the lead agency as part of the required match.

Other

- > On NHS: No
- > Is this a project that requires transportation modeling: No
- > Is the project located on the Metro Model: Yes - The Westside Trail is identified in the Metro Pedestrian modeling network as a new proposed trail
- > Model category and type: Future Pedestrian Parkway
- > TCM project: No
- > Located on the CMP: No

Oregon Community Paths Program (Page 1 of 2)
Recommended Oregon Community Paths Projects for Approval

Project Priority	Applicant	Project Title	Project Type	Requested Funding	Funds requested	Local Match
1	Wasco County (NWCPRD)	Mill Creek Greenway	Construction	Federal	\$2,624,206	\$300,352
2	ASHLAND PARKS AND RECREATION COMMISSION	Kestrel Park Bridge - Bear Creek Greenway Extension	Construction	Federal	\$498,002	\$56,999
3	Astoria, City of	Riverwalk Trail Continuation of Lighting East for Increased Pedestrian Use and Safety	Construction	Federal	\$844,843	\$96,696
4	City of Tualatin	Tualatin River Greenway Trail Extension	Construction	MAT Fund	\$1,055,899	\$452,528
5	City of Hermiston	Belt Park Greenway Trail	Construction	Federal	\$266,498	\$30,502
6	City of Independence	South Willamette River Trail Refinement	Project Refinement	Federal	\$107,676	\$12,324
7	Tualatin Hills Park & Recreation District	Westside Trail Segments 14-18 Master Plan (Preferred Alignment)	Project Refinement	Federal	\$527,477 \$572,477	\$65,523
8	Salmonberry Trail Foundation/ Rockaway Beach	Rockaway Beach	Construction	Federal	\$1,576,556	\$180,444
9	City of Eugene	Eugene Berkeley Park Path	Construction	Federal	\$490,666	\$56,159
10	Corvallis, City of	Tunison Community Path	Project Refinement	Federal	\$497,104	\$56,896
11	Madras, City of	Juniper Hills to Madras East Trails Multiuse Connection Project	Construction	MAT Fund	\$168,000	\$72,000
12	City of Chiloquin	Chiloquin Community Safe and Healthy Connections	Construction	Federal	\$456,300	\$52,225
13	Washington County LU&T	Reedville Trail	Construction	MAT Fund	\$1,542,800	\$661,200
14	City of La Grande	City of La Grande Critical Link Project Refinement	Project Refinement	Federal	\$134,595	\$15,405
15	City of Ontario	Ontario North-South Connector	Project Refinement	Federal	\$67,298	\$7,703
16	Confederated Tribes of the Umatilla Indian Reservation	Tribal Services Center Access Path	Construction	MAT Fund	\$192,349	\$82,435
17	City of Warrenton	Tansy Point Connection NW 11th Path	Project Refinement	Federal	\$93,319	\$10,681

Note: The funding award for THPRD is \$572,477 and not \$527,477 as listed in the funding chart above



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

Formal Amendment
ADD NEW PROJECT
Add a new ADA compliant curbs and ramps project to the MTIP

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 22435
Project Name: OR47/OR8/US30 Curb Ramps	6	ODOT Type: Safety	MTIP ID: New TBD
		Performance Meas: Yes	Status: 3
Project Status: 3 = (PE) Preliminary Engineering (NEPA) activities initiated		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
Short Description: Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR47, OR8, and US30 to reduce mobility barriers and make state highways more accessible to disabled persons	US30	On State Hwy Sys: OR47	RFFA ID: N/A
	46.66	Mile Post Begin: 17.88	RFFA Cycle: N/A
	48.40	Mile Post End: 90.59	UPWP: No
	1.74	Length: 72.71	UPWP Cycle: No
		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 #: 21-24-0786		MTIP Amnd #: OC22-01-OCT	

Detailed Description: At approximately 22 locations on OR47, OR8, and US30, construct to ADA standards curbs and ramps as part of the ODOT/AOCIL settlement to help reduce mobility barriers and make state highways more accessible to disable persons (RTP ID: 12095), (PGB = Yes, Safety & Ops) (OTC approval: March 2021, Item G), (Exempt 40 CFR93.126, Table 2, Air Quality - Bicycle and Pedestrian Improvements)

STIP Description: TBD

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
AC-STBGS	ACPO	2021		\$ 1,969,369				\$ 1,969,369
AC-STBGS	ACPO	2022			\$ 692,952			\$ 692,952
AC-STBGS	ACPO	2023				\$ 3,017,855		\$ 3,017,855
								\$ -
Notes: FTA HOPE Grant is set at 90% federal							Federal Totals:	\$ 5,680,176
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2021		\$ 225,403				\$ 225,403
State	Match	2022			\$ 79,312			\$ 79,312
State	Match	2023				\$ 345,407		\$ 345,407
								\$ -
							State Total:	\$ 650,122
Local Funds								
								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 2,194,772	\$ 772,264	\$ 3,363,262	\$ -	\$ 6,330,298
							Year Of Expenditure (YOE):	\$ 6,330,298

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 ADA curb and ramp construction project for ODOT
- > Support Materials: OTC item and Staff Report, project location maps

Amendment Summary:

The formal amendment adds the new ADA curbs and ramps project for ODOT to the 2021-26 MTIP.

- > Will Performance Measurements Apply: No

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBGS = Federal Advance Construction also referred to as "AC funds". AC funds are used by ODOT as a placeholder until the actual federal fund type code is known. AC-STBGS reflects that the expected fund type code will be federal Surface Transportation Block Grant funds appropriated to ODOT.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes on OR 8 and OR47 in Forest Grove.
- > Metro Model: Yes - Bicycle and Pedestrian networks
- > Model category and type: Bicycle and Pedestrian Parkways
- > TCM project: No
- > Located on the CMP: Yes on OR 47 in Forest Grove



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 03, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda G** – *Update the Commission on the cost reduction efforts underway with the ADA Program*

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.



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

Formal Amendment
ADD NEW PROJECT
 Add a new ADA compliant curbs and ramps project to the MTIP

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 22468
Project Name: US30BY Curb Ramps Group A: N Greeley Ave - I-5 (Portland)	7	ODOT Type: Safety	MTIP ID: New TBD
		Performance Meas: Yes	Status: 4
		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
		On State Hwy Sys: US30BY	RFFA ID: N/A
		Mile Post Begin: 4.50	RFFA Cycle: N/A
		Mile Post End: 5.35	UPWP: No
		Length: 0.85	UPWP Cycle: No
		Flex Transfer to FTA: No	Transfer Code: N/A
		1st Year Program'd: 2022	Past Amend: 0
		Years Active: 0	OTC Approval: Yes
		STIP Amend #: 21-24-0956	

Detailed Description: On US30BY from MP 4.50 to MP 5.35, construct to ADA standards curbs and ramps as part of the ODOT/AOCIL settlement to help reduce mobility barriers and make state highways more accessible to disable persons (RTP ID: 12095), (PGB = Yes, Safety & Ops) (OTC approval: March 2021, Item G), (Exempt 40 CFR93.126, Table 2, Air Quality - Bicycle and Pedestrian Improvements) (PE design completed in Key 22204)

STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
AC-STBGS	ACPO	2022			\$ 309,569			\$ 309,569
AC-STBGS	ACPO	2022				\$ 22,433		\$ 22,433
AC-STBGS	ACPO	2022					\$ 1,660,005	\$ 1,660,005
								\$ -
							Federal Totals:	\$ 1,992,007
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022			\$ 35,431			\$ 35,431
State	Match	2022				\$ 2,567		\$ 2,567
State	Match	2022					\$ 189,995	\$ 189,995
								\$ -
							State Total:	\$ 227,993
Local Funds								
								\$ -
								\$ -
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ 345,000	\$ 25,000	\$ 1,850,000	\$ 2,220,000
							Year Of Expenditure (YOE):	\$ 2,220,000

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 ADA curb and ramp construction project for ODOT
- > Support Materials: OTC item and Staff Report
- > Note: PE was completed through the larger regional project in Key 22204.

Amendment Summary:

- The formal amendment adds the new US30BY ADA curbs and ramps project for ODOT to the 2021-26 MTIP.
- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBGS = Federal Advance Construction also referred to as "AC funds". AC funds are used by ODOT as a placeholder until the actual federal fund type code is known. AC-STBGS reflects that the expected fund type code will be federal Surface Transportation Block Grant funds appropriated to ODOT.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes on US30BY
- > Metro Model: Yes - Bicycle and Pedestrian networks
- > Model category and type: Bicycle and Pedestrian Parkways
- > TCM project: No
- > Located on the CMP: Yes on OR 47 in Forest Grove



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 03, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda G** – *Update the Commission on the cost reduction efforts underway with the ADA Program*

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.



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

Formal Amendment
ADD NEW PROJECT
Add a new ADA compliant curbs and ramps project to the MTIP

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 22469
Project Name: OR99E Curb Ramps Group A: SE Woodward St -Oregon City	8	ODOT Type: Safety	MTIP ID: New TBD
		Performance Meas: Yes	Status: 4
		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
		On State Hwy Sys: OR99E	RFFA ID: N/A
		Mile Post Begin: 1.45	RFFA Cycle: N/A
		Mile Post End: 13.89	UPWP: No
		Length: 12.44	UPWP Cycle: No
		Flex Transfer to FTA: No	Transfer Code: N/A
		1st Year Program'd: 2022	Past Amend: 0
		Years Active: 0	OTC Approval: Yes
		STIP Amend #: 21-24-0957	

Detailed Description: On OR99E from MP 1.45 to 13.89 MP, construct to ADA standards curbs and ramps as part of the ODOT/AOCIL settlement to help reduce mobility barriers and make state highways more accessible to disable persons (RTP ID: 12095), (PGB = Yes, Safety & Ops) (OTC approval: March 2021, Item G), (Exempt 40 CFR93.126, Table 2, Air Quality - Bicycle and Pedestrian Improvements) (PE design completed in Key 22204)

STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
AC-STBGS	ACPO	2022			\$ 740,272			\$ 740,272
AC-STBGS	ACPO	2022				\$ 53,838		\$ 53,838
AC-STBGS	ACPO	2022					\$ 3,992,985	\$ 3,992,985
								\$ -
							Federal Totals:	\$ 4,787,095
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022			\$ 84,728			\$ 84,728
State	Match	2022				\$ 6,162		\$ 6,162
State	Match	2022					\$ 457,015	\$ 457,015
								\$ -
							State Total:	\$ 547,905
Local Funds								
								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ 825,000	\$ 60,000	\$ 4,450,000	\$ 5,335,000
							Year Of Expenditure (YOE):	\$ 5,335,000

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 ADA curb and ramp construction project for ODOT
- > Support Materials: OTC item and Staff Report
- > Note: PE was completed through the larger regional project in Key 22204.

Amendment Summary:

- The formal amendment adds the new OR99E ADA curbs and ramps project for ODOT to the 2021-26 MTIP.
- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBGS = Federal Advance Construction also referred to as "AC funds". AC funds are used by ODOT as a placeholder until the actual federal fund type code is known. AC-STBGS reflects that the expected fund type code will be federal Surface Transportation Block Grant funds appropriated to ODOT.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes on OR99E
- > Metro Model: Yes - Bicycle and Pedestrian networks
- > Model category and type: Bicycle and Pedestrian Parkways
- > TCM project: No
- > Located on the CMP: Yes



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 03, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda G** – *Update the Commission on the cost reduction efforts underway with the ADA Program*

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.



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

Formal Amendment
ADD NEW PROJECT
Add a new ADA compliant curbs and ramps project to the MTIP

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 22470
Project Name: OR10 Curb Ramps Group A: SW 198th Ave - SW Kinnaman Rd	9	ODOT Type: Safety	MTIP ID: New TBD
		Performance Meas: Yes	Status: 4
		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
		On State Hwy Sys: OR10	RFFA ID: N/A
		Mile Post Begin: 5.88	RFFA Cycle: N/A
		Mile Post End: 7.38	UPWP: No
		Length: 1.50	UPWP Cycle: No
		Flex Transfer to FTA: No	Transfer Code: N/A
		1st Year Program'd: 2022	Past Amend: 0
		Years Active: 0	OTC Approval: Yes
		STIP Amend #: 21-24-0958	MTIP Amnd #: OC22-01-OCT

Detailed Description: On OR10 from MP 5.88 to MP 7.38, construct to ADA standards curbs and ramps as part of the ODOT/AOCIL settlement to help reduce mobility barriers and make state highways more accessible to disable persons (RTP ID: 12095), (PGB = Yes, Safety & Ops) (OTC approval: March 2021, Item G), (Exempt 40 CFR93.126, Table 2, Air Quality - Bicycle and Pedestrian Improvements) (PE design completed in Key 22204)

STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
AC-STBGS	ACPO	2022			\$ 246,757			\$ 246,757
AC-STBGS	ACPO	2022				\$ 17,049		\$ 17,049
AC-STBGS	ACPO	2022					\$ 1,345,950	\$ 1,345,950
								\$ -
							Federal Totals:	\$ 1,609,756
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022			\$ 28,243			\$ 28,243
State	Match	2022				\$ 1,951		\$ 1,951
State	Match	2022					\$ 154,050	\$ 154,050
								\$ -
							State Total:	\$ 184,244
Local Funds								
								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ 275,000	\$ 19,000	\$ 1,500,000	\$ 1,794,000
							Year Of Expenditure (YOE):	\$ 1,794,000

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 ADA curb and ramp construction project for ODOT
- > Support Materials: OTC item and Staff Report
- > Note: PE was completed through the larger regional project in Key 22204.

Amendment Summary:

- The formal amendment adds the new OR10 ADA curbs and ramps project for ODOT to the 2021-26 MTIP.
- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > AC-STBGS = Federal Advance Construction also referred to as "AC funds". AC funds are used by ODOT as a placeholder until the actual federal fund type code is known. AC-STBGS reflects that the expected fund type code will be federal Surface Transportation Block Grant funds appropriated to ODOT.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes on OR10
- > Metro Model: Yes - Bicycle and Pedestrian networks
- > Model category and type: Bicycle and Pedestrian Parkways
- > TCM project: No
- > Located on the CMP: Yes



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: March 03, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda G** – *Update the Commission on the cost reduction efforts underway with the ADA Program*

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.



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

Formal Amendment
ADD NEW PROJECT
 Add a new railroad crossing safety improvement project

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 22440
Project Name: NW 112th Street and PNWR Rail Crossing Upgrades	10	ODOT Type: Safety	MTIP ID: New TBD
		Performance Meas: Yes	Status: 2
		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
		On State Hwy Sys: OR10	RFFA ID: N/A
		Mile Post Begin: 5.88	RFFA Cycle: N/A
		Mile Post End: 7.38	UPWP: No
		Length: 1.50	UPWP Cycle: No
		Flex Transfer to FTA: No	Transfer Code: N/A
		1st Year Program'd: 2022	Past Amend: 0
		Years Active: 0	OTC Approval: Yes
		STIP Amend #: 21-24-0801	MTIP Amnd #: OC22-01-OCT
		Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)	
Short Description: Add active warning devices to the railroad-highway crossing at NW 112th Ave and Portland & Western Railroad located in an industrial tank farm to decrease future rail crossing incidents with motor vehicles and truck traffic			

Detailed Description: Upgrade from current passive to active warning devices at the NW 112th Ave PNWR railroad at-grade crossing which includes the movement of mixed commodities and hazardous materials to decrease future rail crossing incidents with motor vehicles and truck traffic (RTP ID: 12095. Exempt: Yes – 93 CFR 123.126, Table 2, Safety - Railroad/highway crossing warning devices. OTC = Yes 9/2021)

STIP Description: Add active warning devices to the railroad-highway crossing at NW 112th Ave and Portland & Western Railroad thereby decreasing the probability of future rail crossing incidents at the crossing which is situated in an industrial tank farm area mixed with residences, truck traffic, and trains carrying hazardous liquids and gases.

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 + Gen Other	Construction	Total
Federal Funds								
AC-RAIL	ACPO	2022		\$ 67,500				\$ 67,500
AC-RAIL	ACPO	2023				\$ 1,044,000		\$ 1,044,000
								\$ -
								\$ -
Projected AC conversion is Rail Hwy Crossing Hazards Elimination - ZS40 No dedicated UR phase exists currently in the MTIP. Therefore UR and Other phase funds as submitted OODT are combined into the MTIP's single Other phase. Federal match % is set at 90% federal and 10% required minimum match							Federal Totals:	\$ 1,111,500
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022		\$ 7,500				\$ 7,500
State	Match	2023				\$ 116,000		\$ 116,000
								\$ -
								\$ -
							State Total:	\$ 123,500
No dedicated UR phase exists currently in the MTIP. Therefore UR and Other phase funds as submitted OODT are combined into the MTIP's single Other phase.								
Local Funds								
								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 75,000	\$ -	\$ 1,160,000	\$ -	\$ 1,235,000
Year Of Expenditure (YOE):								\$ 1,235,000

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 at-grade railroad crossing safety improvement project for ODOT.
- > Support Materials: OTC item and Staff Report, + project location maps

Amendment Summary:

The formal amendment adds the new NW 112th Av at railroad crossing safety improvement project for ODOT to the 2021-26 MTIP.

- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.


Fund Codes:

- > AC-RAIL = Federal Advance Construction also referred to as "AC funds". AC funds are used by ODOT as a placeholder until the actual federal fund type code is known. AC-RAIL reflects that the expected fund type code will be federal Rail Highway Crossing Hazards Elimination funds (code ZS40).
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

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



DATE: August 26, 2021
TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler, Director
SUBJECT: Consent 10 – Annual STIP Adjustment

Requested Action:

Approve the annual amendment to update the projects in the 2021-2024 Statewide Transportation Improvement Program (STIP).

Background:

In June 2019, the Oregon Transportation Commission (OTC) approved a major rebalance of the STIP to address the reprioritizing of projects and address positive and negative funding changes for the entire STIP. In July 2020, as part of the Commission’s delegated approval update, the OTC approved new delegations on STIP revisions under \$5 million to the Director and the Division Administrator.

At the July 15, 2021 commission meeting, the OTC reviewed a new process to bring the majority of STIP amendments before the OTC for a yearly action to reduce the number of approvals throughout the year and provide the Commission a more comprehensive view of the changes made to the STIP.

Criteria for projects for the annual STIP adjustment are the following:

- New high priority projects (selected by their respective funding program), including amending a preliminary engineering phase into the STIP for construction in the 24-27 STIP.
- Modifications to existing STIP projects that advance program goals or Key Performance Measures, and selected as a priority by the funding program.

The targeted programs for the annual STIP adjustment are:

- Bridge Program
- Preservation Program (both Interstate Maintenance and Region paving)
- Culverts Program
- Roadside Safety Features
- Rail Program
- Active Transportation

Key Number <small>(leave blank if new)</small>	Region	Project Name	BMP	EMP	Bridge # *DFI #	Phase	Primary Work Type	Funding Responsibility	Current Total (0 if new)	Proposed Total	Difference	Priority / Action Description
22485	1	OR281: Evans creek fish-passage improvements	17	17		OT	CULVERT	HB2017 Culvert	\$ -	\$ 308,000.00	\$ 308,000.00	New project. High priority.
22440	1	NW 112th Street and PNWR Rail Crossing Upgrades	7.6	7.6		PE, UR, OT	RAIL	SW RAIL	\$ -	\$ 1,235,000.00	\$ 1,235,000.00	New project. High priority.
	1	OR211 Road safety audit	14	24		PE	SAFETY	R1 Safety	\$ -	\$ 230,000.00	\$ 230,000.00	New project. High priority.
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	PE, CN	BR-RLR	FIX-IT SW BRIDGE	\$613,496.00	\$613,496.00	\$-	Change project timing to include adjacent high priority work.



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

**Formal Amendment
COMBINE & EXPAND**
Combine funds and scope from Key
18839 into Key 18794

Lead Agency: ODOT		Project Type: Safety	ODOT Key: 18794
Project Name: OR8: SW Short Ave - SW 110th Ave (Beaverton) OR8: SW 192 Ave - SW 110th Ave	11	ODOT Type: Safety	MTIP ID: 70766
Project Status: 5 = (RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation.		Performance Meas: Yes	Status: 5
Short Description: Safety upgrades to install larger signal heads, reflective backboards, pedestrian countdown signals and left turn phasing where feasible, Safety upgrades to install larger signal heads, reflective backboards, pedestrian countdown signals and left turn phasing plus sidewalk infill and improvements, bus stop relocations, bus pads, & enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave.		Capacity Enhancing: No	Comp Date: 9/30/2026
		Conformity Exempt: Yes	RTP ID: 12095
		On State Hwy Sys: OR8	RFFA ID: N/A
		Mile Post Begin: 2.75 2.70	RFFA Cycle: N/A
		Mile Post End: 3.70 7.03	UPWP: No
		Length: 0.95 4.33	UPWP Cycle: No
		Flex Transfer to FTA: No	Transfer Code: N/A
		1st Year Program'd: 2016	Past Amend: 6
Years Active: 6	OTC Approval: No		
STIP Amend #: 21-24-0701		MTIP Amnd #: OC22-01-OCT	
Detailed Description: On OR8 from MP 2.75 to 3.70 from Short Ave to SW 110th Ave in Beaverton, complete various safety upgrades at 9 identified locations that include larger signal heads, reflective backboards, pedestrian countdown signals and left turn phasing where feasible On OR8 between MP 2.70 to 7.33, complete safety upgrades to install larger signal heads, reflective backboards, pedestrian countdown signals and left turn phasing plus sidewalk infill and improvements, bus stop relocations, bus pads, & enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave. (Combines Key 18839 into construction. RTP ID: 12095. Exempt: Yes – 93 CFR 123.126, Table 2, Safety)			
STIP Description: Install larger signal heads, reflective backboards, pedestrian countdown signals and other signal improvements to increase safety on SW Short Ave - SW 110th Ave. Sidewalk infill and improvements, bus stop relocations, bus pads, and enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave.			

Last Amendment of Modification: Administrative, AB21-22-AUG2, August 2021 - Slip Advance Construction funds of \$2,163,084 and \$50,323 of matching funds to FY 2022.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
HSIP	ZS30	2016		\$ 437,500	-			\$ -
HSIP	ZS30	2016		\$ 687,500				\$ 687,500
ADVCON	ACP0	2020			\$ 379,000			\$ -
HSIP	ZS30	2020			\$ 289,000			\$ 289,000
ADVCON	ACP0	2022					\$ 2,163,084	\$ -
HSIP	ZS30	2022					\$ 1,723,407	\$ 1,723,407
State STBG	Z240	2022					\$ 1,188,043	\$ 1,188,043
Note: HSIP funds are 100% federal							Federal Totals:	\$ 3,887,950
Federal Fund Obligations \$:				\$ 437,500				Federal Aid ID
EA Number:				PE002727				S029(032)
Initial Obligation Date:				9/15/2016				
EA End Date:				N/A				
Known Expenditures:				N/A				
State Funds								
State	Match	2022		-	-		\$ 50,323	\$ -
State	Match	2022					\$ 135,977	\$ 135,977
								\$ -
								\$ -
							State Total:	\$ 135,977
No dedicated UR phase exists currently in the MTIP. Therefore UR and Other phase funds as submitted OODT are combined into the MTIP's single Other phase.								
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ 437,500	\$ 379,000	\$ -	\$ 2,213,407	\$ 3,029,907
Phase Totals After Amend:			\$ -	\$ 687,500	\$ 289,000	\$ -	\$ 3,047,427	\$ 4,023,927
							Year Of Expenditure (YOE):	\$ 4,023,927

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.
- > Combine prior obligated and removed Key 18839's construction phase into Key 18794 which also expands the limits. Update name, description, and funding.
- > Support Materials: Project location maps

Amendment Summary:

The formal amendment combines the prior obligated Key 18839 into Key 18794. Complications with the bids for Key 18839 resulted in the construction phase being de-obligated. The funding is now being added to Key 18794. As a result, the project name and description are updated. Key 18839 and 18794 will be delivered under a Key 18794 for more efficient delivery efficiencies. Although previously obligated, the construction funds for key 18839 were de-obligated resulting in the amendment having to add the funds as new funding to the MTIP and satisfy and demonstrate fiscal constraint. Through this formal amendment, Key 18839 and Key 18794 are now combined.

- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12095 - Safety & Operations Projects
- > RTP Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
- > Exemption status: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > HSIP = Federal Highway Safety Improvement Program funds appropriated to ODOT for various eligible safety improvements
- > ADVCON = Federal Advance Construction fund type code used as a placeholder until the actual federal funds are known and committed to the project.
- > State STBG = Federal Surface Transportation Block Grant funds appropriated to ODOT with this portion managed and allocated to projects based eligible ODOT projects.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes, -" Other NHS Routes"
- > Does the project require air conformity and transportation modeling; No
- > Located on Metro Model: Yes.
- > Model category and type: OR 8 is defined as a Major Arterial on the Motor Vehicle network
- > TCM project: No
- > Located on the CMP: Yes



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ODOT Key: 18839 | MTIP ID: 70780

OR8: SW 192nd Ave (Aloha) - SW 165th Ave (Beaverton) - 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
Preliminary engineering	2016		\$715,148	\$81,852	\$0	\$797,000	<input type="checkbox"/>
	2015	TAP - State	\$425,500	\$48,700	\$0	\$474,200	
	2016	HSIP (89.73%)	\$289,648	\$33,152	\$0	\$322,800	
Construction	2020		\$735,786	\$84,214	\$81,000	\$901,000	<input type="checkbox"/>
	2014	ACPO - Advance CN	\$735,786	\$84,214	\$81,000	\$901,000	
Purchase right of way	2019		\$87,038	\$9,962	\$0	\$97,000	<input type="checkbox"/>
	2014	ACPO - Advance CN	\$25,124	\$2,876	\$0	\$28,000	
	2019	TA - STATE	\$61,914	\$7,086	\$0	\$69,000	
Other (explain)	2019		\$0	\$0	\$0	\$0	<input type="checkbox"/>
Totals >>			\$1,537,972	\$176,028	\$81,000	\$1,795,000	

Prior obligated construction phase funds from Key 18839 were de-obligated and made available to be combined into Key 18794. The construction phase from Key 18839 is now combined into Key 18794 for increased delivery efficiencies



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

Formal Amendment
SPLIT/CANCEL PROJECT
 Split project funds and scope and
 combine into Key 21128

Lead Agency: ODOT		Project Type:	Safety		ODOT Key:	21779
Project Name: US30: Watson Rd - NW Hoge Ave	12	ODOT Type	Culvert		MTIP ID:	71198
		Performance Meas:	Yes		Status:	2
Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)		Capacity Enhancing:	No		Comp Date:	N/A
		Conformity Exempt:	Yes		RTP ID:	12093
Short Description: Repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse.		On State Hwy Sys:	US30		RFFA ID:	N/A
		Mile Post Begin:	7.80		RFFA Cycle:	N/A
		Mile Post End:	18.37		UPWP:	No
		Length:	10.57		UPWP Cycle:	No
		Flex Transfer to FTA	No		Transfer Code	N/A
		1st Year Program'd:	2021		Past Amend:	1
		Years Active:	1		OTC Approval:	No
		STIP Amend #: 21-24-0701			MTIP Amnd #:	OC22-01-OC
Detailed Description: Repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse.						
STIP Description: Repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse.						
Last Amendment of Modification: Administrative, August 2021 - AB21-22-AUG2, Slip PE with \$410,236 of NHPP and match to FY 2022						

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
NHPP	Z001	2022		\$ 410,246				\$ -
NHPP	Z001	2023					\$ 957,240	\$ -
								\$ -
								\$ -
							Federal Totals:	\$ -
Federal Fund Obligations \$:								Federal Aid ID
EA Number:								S029(032)
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022		\$ 46,954				\$ -
State	Match	2023					\$ 109,560	\$ -
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ 457,200	\$ -	\$ -	\$ 1,066,800	\$ 1,524,000
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Year Of Expenditure (YOE):								\$ -

Notes and Summary of Changes:

- > Red font = Prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- > Combine Key 21779 into Key 21128. Key 21779 is left zero programmed.
- > Support Materials: None

Amendment Summary:

- The formal amendment splits the funding and scope and combines it into the re-added Key 21128 project (also part of the October amendment bundle). As a result, Key 21779 is de-programmed. Implementation will be through Key 21128.
- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12093 - Culvert Replacement & 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: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > NHPP = Federal National Highway Performance Program appropriated to ODOT to be applied to eligible projects.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes, - US30 is identified as a "Other NHS Routes" in the NHS system
- > Does the project require air conformity and transportation modeling; No
- > Located on Metro Model: Yes.
- > Model category and type: US30 is defined as a Throughway on the Motor Vehicle network
- > TCM project: No
- > Located on the CMP: Yes



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

Formal Amendment
ADD COMBINED PROJECT
Re-add new project combined with
Key 21779

Lead Agency: ODOT		Project Type:	Safety		ODOT Key:	21128
Project Name: US30: CORRIDOR (MP 9.08 TO 17.68) (former title) US30: Watson Rd - Hoge Ave Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated). Short Description: Repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse and help provide additional roadway safety to motorists	13	ODOT Type	Culvert		MTIP ID:	TBD - New
		Performance Meas:	Yes		Status:	4
		Capacity Enhancing:	No		Comp Date:	N/A
		Conformity Exempt:	Yes		RTP ID:	12093
		On State Hwy Sys:	US30		RFFA ID:	N/A
		Mile Post Begin:	7.80		RFFA Cycle:	N/A
		Mile Post End:	18.37		UPWP:	No
		Length:	10.57		UPWP Cycle:	No
		Flex Transfer to FTA	No		Transfer Code	N/A
		1st Year Program'd:	2017		Past Amend:	0
		Years Active:	6		OTC Approval:	No
		STIP Amend #:	21-24-1099		MTIP Amnd #:	OC22-01-OCT
		Detailed Description: On US30 between Hoge Ave in NW Portland to Watson Rd (outside of MPA) MP 7.80 to MP 18.37, repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse and help provide additional roadway safety to motorists (RTP ID 12093, Exempt = Yes 40 CFR 93.126, Table 2 Safety, Combines Key 21779 scope and funding)				
STIP Description: Repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse.						
Last Amendment of Modification: Formal, September 2020 Project was obligated and removed from carryover consideration into the 2021-26 MTIP						

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
TIFIA	M040	2017		\$ 175,871				\$ 175,871
ADVCON	ACPO	2017		\$ 410,246				\$ 410,246
NHPP	Z001	2023					\$ 957,240	\$ 957,240
								\$ -
							Federal Totals:	\$ 1,543,357
Federal Fund Obligations \$:				\$ 196,000				Federal Aid ID
EA Number:				PE002860				S092(061)
Initial Obligation Date:				9/11/2017				
EA End Date:				N/A				
Known Expenditures:				N/A				
State Funds								
State	Match	2017		\$ 20,129				\$ 20,129
State	Match	2017		\$ 46,954				\$ 46,954
State	Match	2023					\$ 109,560	\$ 109,560
								\$ -
							State Total:	\$ 176,643
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 653,200	\$ -	\$ -	\$ 1,066,800	\$ 1,720,000
Year Of Expenditure (YOE):								\$ 1,720,000

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.
- > Combine Key 21779 into Key 21128. Key 21779 is left zero programmed.
- > Support Materials: Project location map.

Amendment Summary:

- The formal amendment splits the funding and scope and combines it into the re-added Key 21128 project (also part of the October amendment bundle). As a result, Key 21779 is de-programmed. Implementation will be through Key 21128.
- > Will Performance Measurements Apply: Yes - Safety

RTP References:

- > RTP ID: 12093 - Culvert Replacement & 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: Exempt project per 93 CFR 126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
- > UPWP amendment: No
- > RTP Goals: Goal 5 - Safety and Security
- > Goal Objective: 5.1 Transportation Safety
- > Goal Description: Eliminate fatal and severe injury crashes for all modes of travel.

Fund Codes:

- > NHPP = Federal National Highway Performance Program appropriated to ODOT to be applied to eligible projects.
- > TFIA = Federal 2015 Redistribution funds allocated to states from other states that did not meet their obligation targets
- > ADVCON = Federal fund place holder used when the actual federal fund type code has not been determined.
- > State = General state funds provided by the lead agency as part of the required match to the federal funds.

Other

- > On NHS: Yes, - US30 is identified as a "Other NHS Routes" in the NHS system
- > Does the project require air conformity and transportation modeling; No
- > Located on Metro Model: Yes.
- > Model category and type: US30 is defined as a Throughway on the Motor Vehicle network
- > TCM project: No
- > Located on the CMP: Yes

Key 21128 as originally programmed up through the 2018-21 MTIP

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ODOT Key: 21128 | MTIP ID: 71024

US30: CORRIDOR (MP 9.08 TO 17.68) - Cycle 2015-18

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Preliminary engineering	2017		\$175,871	\$20,129		\$196,000	<input type="checkbox"/>
	2014	State STP (M240)	\$175,871	\$20,129		\$196,000	
Totals >>			\$175,871	\$20,129	\$0	\$196,000	

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: October 21, 2021
To: Metro Council and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: October 2021 (FFY 2022) MTIP Formal Amendment & Resolution 21-5205 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO AMEND OR ADD APPROXIMATELY 13 PROJECTS IMPACTING METRO, ODOT, PORTLAND, AND THPRD ENSURING REQUIRED FEDERAL APPROVALS AND PHASE OBLIGATIONS CAN MOVE FORWARD (OC22-01-OCT)

BACKGROUND

What This Is:

The October 2021 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle which is contained in Resolution 21-5205 and being processed under MTIP Amendment OC22-01-OCT. The bundle contains a total of 13 project amendments.

What is the requested action?

JPACT approved Resolution 21-5205 on October 21, 2021, and recommends Metro Council approve the October 2021 Formal Amendment bundle under Resolution 21-5205 consisting of thirteen new or amended projects which impacts Metro, ODOT, Portland, and THPRD.

Proposed October 2021 (FFY 2022) Formal Amendment Bundle					
Amendment Type: Formal/Full					
Amendment #: OC22-01-OCT					
Total Number of Projects: 13					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Category: Metro Awarded Transportation Systems Management and Operations (TSMO) projects					
Project #1 Key 20885	70875	Metro	Transportation System Mgmt Operations/ITS (2020)	Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)	SPLIT FUNDS: Split and reduce STBG-U funds by \$846,333 and commit to Portland's new awarded TSMO projects also part of this amendment bundle (projects #2 and #3 that follow)

ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #2 Key New TBD	New TBD	Portland	Traffic Signal Communication Improvements: Holgate Blvd & 92nd Ave	Install traffic signal controller communication improvements to up to 7 signal locations on SE Holgate Blvd and 92nd Ave for increased safety and service to motorists	<u>ADD NEW PROJECT:</u> The formal amendment adds the new Metro TSMO awarded project which will provide traffic signal controller improvements at locations on Holgate Blvd and 92 nd Ave
Project #3 Key New TBD	New TBD	Portland	Portland Traffic Signal Performance Measures Development & Eval	Across Portland, develop and validate new required Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new Metro TSMO awarded project which will develop and evaluate traffic signal performance measurements
Category: Project Planning/Studies					
Project #4 Key New TBD	New TBD	Metro	Tualatin Valley Hwy Transit & Development Project	Complete corridor planning including developing an equitable development strategy (EDS), a locally preferred alternative (LPA) for a transit project, an alternative analysis for a preferred alignment for future construction of pedestrian improvements.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new OR8 corridor study that includes a FTA HOPE grant.
Project #5 Key 22475	New TBD	THPRD	Westside Trail Project Refinement	Project refinement study to lay the foundation for closing a critical 2.3-mile gap in the Westside Trail between SW Walker Rd and NW Kaiser Rd in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.	<u>ADD NEW PROJECT</u> The formal amendment adds the new Oregon Community Paths Program FY 2021-24 Awarded project to Tualatin Hills Parks and Recreation District (ODOT managed program)
Category: ODOT Projects					
Project #6 Key 22435	New TBD	ODOT	OR47/OR8/US30 Curb Ramps	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR47, OR8, and US30 to reduce mobility barriers and make State Highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP.
Project #7 Key 22468 NEW	New TBD	ODOT	US30BY curb ramps group A: N Greeley Ave - I-5 (Portland)	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along US30BY to reduce mobility barriers and make state highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP

Project #8 Key 22469 NEW	New TBD	ODOT	OR99E curb ramps group A: SE Woodward St - Oregon City	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR99E to reduce mobility barriers and make state highways more accessible to disabled persons	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #9 Key 22470 New	New TBD	ODOT	OR10 curb ramps group A: SW 198th Ave – SW Kinnaman Rd	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR10 to reduce mobility barriers and make state highways more accessible to disabled persons.	<u>ADD NEW PROJECT:</u> The formal amendment adds the ADA curb and ramp project to the 2021-26 MTIP
Project #10 Key 22440 New	New TBD	ODOT	NW 112th Street and PNWR rail crossing upgrades	Add active warning devices to the railroad-highway crossing at NW 112th Ave and Portland & Western Railroad thereby decreasing the probability of future rail crossing incidents at the crossing which is situated in an industrial tank farm area mixed with residences, truck traffic, and trains carrying hazardous liquids and gases.	<u>ADD NEW PROJECT:</u> The formal amendment adds a new rail safety improvement project for ODOT
Project #11 Key 18794	70766	ODOT	OR8: SW Short Ave – SW 110th Ave (Beaverton) OR8: SW 192 Ave - SW 110th Ave	Safety upgrades to install larger signal heads reflective backboards pedestrian countdown signals and left turn phasing where feasible Install larger signal heads, reflective backboards, pedestrian countdown signals and other signal improvements to increase safety on SW Short Ave - SW 110th Ave. Sidewalk infill and improvements, bus stop relocations, bus pads, and enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave.	<u>COMBINED PROJECT:</u> The formal amendment combines a prior obligated construction phase from Key 18839 into Key 18794 for increased delivery efficiencies as a single project
Project #12 Key 21779	71198	ODOT	US30: Watson Rd - NW Hoge Ave	Repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse.	<u>SPLIT/CANCEL PROJECT:</u> The formal amendment splits the scope and funding and combines it into Key 21128 – also included in this amendment bundle. As a result Key 21779 is zero programmed
Project #13 Key 21128 New	71024	ODOT	US30: CORRIDOR (MP 9.08 TO 17.68) US30: Watson Rd - Hoge Ave	New Combined Project Description: Repair or replace culverts in poor condition along this corridor to prevent further damage and possible collapse.	<u>ADD AND COMBINE PROJECT:</u> The formal amendment re-adds Key 21128 into the 2021-26 MTIP and includes combing the scope and funding from Key 21779

AMENDMENT BUNDLE SUMMARY:Transportation Policy Alternatives Committee (TPAC) Summary Update:

TPAC received their notification and overview of the October Formal MTIP Amendment under Resolution 21-5205 on October 1, 2021. TPAC members were provided an opportunity for comment and discussion. TPAC members raised no negative observations or issues with any of the projects in the amendment bundle. TPAC vetoed unanimously to recommended approval to JPACT to approve the October 2021 Formal MTIP Amendment under Resolution 21-5205.

Joint Policy Advisory Committee on Transportation (JPACT) Summary Update:

The October Formal MTIP Amendment under Resolution 21-5205 proceed to the committee as a consent item on the agenda on October 21, 2021. JPACT approved Resolution 21-5205 unanimously without discussion.

The October 2021 (FFY 2022) Formal MTIP Amendment bundle initiates project programming adjustments needed for federal fiscal Year (FFY) 2022. The amendment bundle contains 13 projects. Composition of the amendment includes the following:

- Ten projects are being added or re-added to the MTIP for various reasons.
- Two of the new projects are Metro TSMO awarded projects
- Two new projects are planning/project development studies
- Four projects involve the construction of ADA compliant curbs and ramps
- Two projects are being combine using project scope and funds from previously obligated projects from the prior MTIP for increased delivery efficiencies

Coming Amendment Attractions for November:

In addition to the regular amendment bundle of projects, the November 2021 Formal Amendment is expected to include two large projects which will be submitted independently with their own resolution number. These project include

- 82nd Ave safety improvements project for Portland which is funded with \$80 million of American Relief Plan Act of 2021 funds
- Interstate 5 Bridge Replacement project for ODOT which will add \$36 million of funds supporting Preliminary Engineering for this bi-state improvement project. A preview from ODOT is included as part of the October 2021 TPAC agenda.

Below is a summary list of key acronyms used in the report:

- AC-STBG = "AC" = Federal Advance Construction programmatic fund type code used as placeholder. The "STBGS" tag represents the expected federal fund type code of State allocated Surface Transportation Block Grant funds that will become the final federal fund for the project.
- ADVCON = Generic Advance Construction fund type code where the future federal fund code is not yet known.
- ADA = Americans with Disabilities Act
- Cons = Construction phase
- FFY = Federal Fiscal Year (e.g. October 1 through September 30)
- FHWA = Federal Highways Administration
- FMIS = FHWA's Financial Management Information System
- FTA = Federal Transit Administration
- HOPE = FTA "Helping Obtain Prosperity for Everyone" discretionary grant program
- HSIP = Federal Highway Safety Improvement Program funds
- ITS = Intelligent Transportation System
- LAL = ODOT Local Agency Liaison staff member

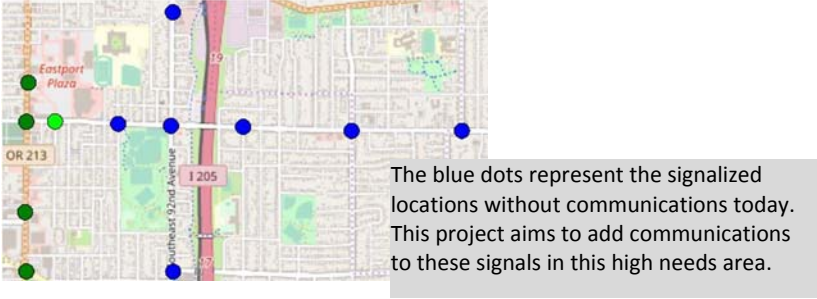
- LPA = Locally Preferred Alternative
- MP = Mile Post limit markers on the State Highway system
- NHPP = Federal National Highway Performance Program funds appropriated to ODOT
- ODOT = Oregon Department of Transportation
- PE = Preliminary Engineering
- ROW/RW = Right of Way phase
- TIFIA = 2015 Redistribution of federal funds action allocated to ODOT
- TrAMS = FTA’s Transit Award Management System
- TSMO = Transportation Systems Management and Operations
- STBG-U = A federal programmatic fund type code. STBG-U funds are appropriated to ODOT with a portion via formula


Projects 1	Transportation System Mgmt Operations/ITS (2020)		
Lead Agency:	Metro		
ODOT Key Number:	20885	MTIP ID Number:	70875
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • Quick Amendment Summary: The amendment splits \$846,333 of Metro STBG-U and commits them to the two new Portland TSMO projects being programmed as part of this amendment bundle. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> Key 20885 is a project grouping bucket (PGB) containing annual RFFA Step 1 allocated funding supporting Metro’s TSMO program. Metro completes periodic discretionary TSMO funding calls. When the awarded project is ready for MTIP and STIP programming, the awarded are split from the TSMO bucket (Key 20885) and committed to the new approved TSMO projects. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Split \$846,333 from Key 20885 and commit to the two new Portland’s TSMO projects. The STBG funds will be committed as follows: <ul style="list-style-type: none"> ○ Traffic Signal Communications: \$227,196 of STBG plus match ○ Regional Traffic Signal System Performance Measures: \$619,137 of STBG plus match ○ Note: STBG = Federal Surface Transportation Block Grant funds • <u>Funding:</u> The funding for the TSMO project grouping bucket originates from the Regional Flexible Fund Allocation (RFFA) Step 1 annual allocation process • <u>FTA Conversion Code:</u> Not applicable. No transit funds are involved. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: N/A – The TSMO PGB awards projects on a regional basis ○ Cross Street Limits: N/A 		

	<ul style="list-style-type: none"> ○ Overall Mile Post Limits: N/A ● <u>Current Status Code</u>: 0 = No activity (for these program funds). The project activity status changes when the awarded project is programmed. ● <u>Air Conformity/Capacity Status</u>: Key 20885 is a project non capacity enhancing project grouping bucket. It is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Traffic control devices and operating assistance other than signalization projects. ● <u>Regional Significance Status</u>: Not applicable ● <u>Amendment ID and Approval Estimates</u>: <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for November 4, 2021.
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: SPLIT FUNDS</u></p> <p>Key 20885 is a project grouping bucket (PGB) containing annual RFFA Step 1 allocated funding supporting Metro’s TSMO program. Metro completes periodic discretionary TSMO funding calls. The awarded TSMO projects then complete required Pre-NEPA scoping actions to ensure delivery delays and obstacles are minimized. TSMO/ITS projects do not fit into the normal federal transportation delivery process. They often require additional time for scoping and to develop delivery steps. Once the order and requirements supporting concept of operations (ConOps), PE, Construction, and post construction/system test and evaluation requirements are understood, the project moves forward to be programmed in the MTIP and STIP. This helps minimize delivery delays and negative impacts to Metro’s annual obligation targets.</p> <p>Both newly awarded Portland TSMO projects have sufficiently completed a scope of work and are now ready for MTIP and STIP programming. Both are included as part of this amendment bundle.</p>
<p>Additional Details:</p>	<p>Key 20885 was moved out to FFY 2025 to avoid conflicts with the annual obligation targets. As Metro awards TSMO funds for ITS improvements, the funds are then committed to the awarded project and advanced to the applicable obligation year.</p>

		<table border="1"> <tr> <td colspan="2">LEAD AGENCY</td> <td colspan="5">Metro</td> </tr> <tr> <td colspan="2">PROJECT NAME</td> <td colspan="5">Transportation System Mgmt Operations/ITS (2020)</td> </tr> <tr> <td colspan="2">Project IDs</td> <td colspan="4">Project Description</td> <td>Project Type</td> </tr> <tr> <td>ODOT KEY</td> <td>20885</td> <td colspan="4" rowspan="3">Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)</td> <td rowspan="3">Transportation System Management Operations</td> </tr> <tr> <td>MTIP ID</td> <td>70875</td> </tr> <tr> <td>RTP ID</td> <td>11104</td> </tr> <tr> <td>Phase</td> <td>Year</td> <td>Fund Type</td> <td>Federal Amount</td> <td>Minimum Local Match</td> <td>Other Amount</td> <td>Total Amount</td> </tr> <tr> <td>Other</td> <td>2025</td> <td>STBG-URBAN</td> <td>\$1,510,851</td> <td>\$172,924</td> <td>\$0</td> <td>\$1,683,775</td> </tr> <tr> <td colspan="3">FY 21-26 Totals</td> <td>\$1,510,851</td> <td>\$172,924</td> <td>\$0</td> <td>\$1,683,775</td> </tr> <tr> <td colspan="3">Estimated Project Cost (YOE5)</td> <td>\$1,510,851</td> <td>\$172,924</td> <td>\$0</td> <td>\$1,683,775</td> </tr> </table>						LEAD AGENCY		Metro					PROJECT NAME		Transportation System Mgmt Operations/ITS (2020)					Project IDs		Project Description				Project Type	ODOT KEY	20885	Provide strategic and collaborative program management including coordination of activities for TransPort TSMO committee. (FY 2020 allocation year)				Transportation System Management Operations	MTIP ID	70875	RTP ID	11104	Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount	Other	2025	STBG-URBAN	\$1,510,851	\$172,924	\$0	\$1,683,775	FY 21-26 Totals			\$1,510,851	\$172,924	\$0	\$1,683,775	Estimated Project Cost (YOE5)			\$1,510,851	\$172,924	\$0	\$1,683,775
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Why a Formal amendment is required?	Adding Portland's new TSMO projects requires a formal amendment. The action to split the funds from Key 20885 directly supports this action and is considered tied to the formal amendment for Portland's new TSMO projects.																																																																		
Total Programmed Amount:	Key 20885 decreases in programmed STBG and matching funds from a total of \$1,683,775 to \$740,575																																																																		
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Project 2	Traffic Signal Communication Improvements: Holgate Blvd & 92nd Ave (New Project)		
Lead Agency:	Portland		
ODOT Key Number:	New - TBD	MTIP ID Number:	New - TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> Quick Amendment Summary: The amendment adds the new Metro awarded TSMO project for Portland. The TSMO award is \$227,196 of federal Surface Transportation Block Grant (STBG) plus match and originate from Key 20885. The project will provide signal communication improvements for up to seven locations on Holgate Blvd and 92nd Ave. <u>Metro UPWP Project:</u> No <u>Proposed improvements:</u> Install traffic signal controller communication improvements to up to 7 signal locations on SE Holgate Blvd and 92nd Ave for increased safety and service to motorists <u>Source:</u> New project. <u>Amendment Action:</u> Add new Metro awarded TSMO project. <u>Funding:</u> The funding originates from the Metro 2019-21 TSMO project funding call. The awarded funds are federal STBG allocated through Metro and are identified by the programmatic fund type code of STBG-U. <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> Location: On Holgate Blvd and 92nd Ave near I-205 Cross Street Limits: 		

	<ul style="list-style-type: none"> ▪ On Holgate Blvd: Approximately SE 72nd Ave east to 112th Ave ▪ On 92nd Ave: Approximately SE Harold St north to SE 91st Pl ○ Overall Mile Post Limits: N/A  <ul style="list-style-type: none"> • <u>Current Status Code:</u> 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Traffic control devices and operating assistance other than signalization projects. • <u>Regional Significance Status:</u> Yes. The project is considered regionally significant as it has federal funds and is located on a Regional Bikeway defined arterial in the Metro Bicycle modeling network and a Pedestrian Parkway (Holgate Blvd portion) in the Metro Pedestrian modeling network • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for November 4, 2021.
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the new Metro TSMO awarded project to the 2021-26 MTIP. STBG funding originates from the TSMO project grouping bucket in Key 20885.</p>
<p>Additional Details:</p>	<p>This project is a foundational investment in traffic signal controller communication on two of our region's arterial streets, allowing us to address the region's equity, safety, climate, and congestion goals. Installing network communications to the two corridors, SE 92nd Ave and SE Holgate Blvd will help the region advance in the following areas:</p> <ul style="list-style-type: none"> • Make it easier to maintain the traffic signal timing, operations, and coordination from anywhere

	<ul style="list-style-type: none"> • Improve the proactive nature of our work in regards to signal timing, operations, and maintenance to better serve our community • Build a foundation for advanced applications including: <ul style="list-style-type: none"> ○ Automated traffic signal performance measures (ATSPMs) that can help us identify and address operational and safety concerns. ○ Next-Generation Transit Signal Priority (NextGen TSP) that can help us meet our climate goals. ○ Other connected vehicle applications such as central emergency preemption. 																				
<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 amendment.</p>																				
<p>Total Programmed Amount:</p>	<p>The federal award is \$227,196 plus a required local match of \$26,004 for a total programming amount of \$253,200.</p>																				
<p>Added Notes:</p>	<p style="text-align: center;">Metro TSMO Funding Award Letter Summary</p> <div style="text-align: right; margin-bottom: 20px;">  <p>Metro 600 NE Grand Ave. Portland, OR 97232-2736</p> </div> <p>Memo</p> <p>Date: Jan. 2, 2020 To: TPAC and Interested Parties From: Caleb Winter, TSMO Program Manager, Senior Transportation Planner Subject: TSMO Sub-allocation for FFY19-21</p> <hr/> <p>Memo Purpose Share TransPort’s Transportation System Management and Operations (TSMO) project recommendations from the 2019 TSMO Project Solicitation (2019-2021 MTIP).</p> <p>Overview TransPort is the Subcommittee of TPAC that plays a key role in advancing TSMO projects. TransPort updates the criteria based on the current TSMO strategy and regional policy priorities. Metro leads the TSMO solicitation and review process. TransPort recommends projects for funding.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Lead agency</th> <th style="width: 35%;">Project name</th> <th style="width: 35%;">Project type</th> <th style="width: 5%; text-align: center;">TSMO Federal Portion</th> </tr> </thead> <tbody> <tr style="border: 2px solid red;"> <td>City of Portland</td> <td>Traffic Signal Communications</td> <td>Data communications through fiber optics</td> <td style="text-align: right;">\$227,196</td> </tr> <tr> <td>City of Portland</td> <td>Local Traffic Signal Controller Replacement</td> <td>ATCs</td> <td style="text-align: right;">\$840,435</td> </tr> <tr> <td>City of Portland</td> <td>Regional Traffic Signal System Performance Measures</td> <td>Traffic Signal Performance Measures for Active Transportation</td> <td style="text-align: right;">\$619,137</td> </tr> <tr> <td>Clackamas County</td> <td>Clackamas County Regional ATC controller & Signal Optimization Project</td> <td>ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville</td> <td style="text-align: right;">\$735,878</td> </tr> </tbody> </table> <p style="text-align: center;">The complete Metro award letter is included as Attachment 1</p>	Lead agency	Project name	Project type	TSMO Federal Portion	City of Portland	Traffic Signal Communications	Data communications through fiber optics	\$227,196	City of Portland	Local Traffic Signal Controller Replacement	ATCs	\$840,435	City of Portland	Regional Traffic Signal System Performance Measures	Traffic Signal Performance Measures for Active Transportation	\$619,137	Clackamas County	Clackamas County Regional ATC controller & Signal Optimization Project	ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville	\$735,878
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<p>Project 3</p>	<p>Portland Traffic Signal Performance Measures Development & Eval (New Project)</p>		
<p>Lead Agency:</p>	<p>Portland</p>		
<p>ODOT Key Number:</p>	<p>New - TBD</p>	<p>MTIP ID Number:</p>	<p>New - TBD</p>
<p>Projects Description:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Quick Amendment Summary:</u> The amendment adds the new Metro awarded TSMO project for Portland. The TSMO award is \$619,137 of federal Surface Transportation Block Grant (STBG) plus required match and originates from Key 20885. The project will develop and validate new required Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> Across Portland, develop and validate new required Automated Traffic Signal Performance Measures (ATSPM) supporting traffic signal controllers to evaluate signal performance providing motorists improved mobility, efficiency, and safety. • <u>Source:</u> New project. • <u>Amendment Action:</u> Add new TSMO awarded project to the MTIP • <u>Funding:</u> The funding originates from the Metro 2019-21 TSMO project funding call. The awarded funds are federal STBG allocated through Metro and are identified by the programmatic fund type code of STBG-U. • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Across Portland (Portland region-wide) ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: N/A 		

	<ul style="list-style-type: none"> • <u>Current Status Code:</u> 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Traffic control devices and operating assistance other than signalization projects. • <u>Regional Significance Status:</u> Yes. The project is considered regionally significant as it has federal funds and will impact locations 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: OC22-01-OCT ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for November 4, 2021.
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the new Metro TSMO awarded project to the 2021-26 MTIP. STBG funding originates from the TSMO project grouping bucket in Key 20885. The project will focus on the development and evaluation of new required ATSPMs supporting traffic signal controllers which will then be used to create metrics that can help optimize operations and streamline maintenance to evaluate signal performance providing motorists improved mobility, efficiency, and safety.</p>
<p>Additional Details:</p>	<p>The project is comprised of a four-point delivery structure which includes:</p> <ul style="list-style-type: none"> • Planning: <ul style="list-style-type: none"> ○ Conduct a series of meetings to assess stakeholder needs (PBOT Signals and Street Lighting (SSL), ODOT, TriMet, etc.). Needs should be identified at the intersection, corridor, and district levels. ○ Evaluate the existing ATSPM system to identify gaps and determine system requirements to achieve stakeholder needs. ○ Determine if any metrics require additional data sources (e.g., probe data) or event codes. ○ Evaluate whether the new metrics will be programmed as additional reports or as an independent dashboard using the underlying database. ○ Develop use cases that describe what data (information) will be generated and what actions will be taken based on that

	<p>information, who will take action, and how it will be further evaluated.</p> <ul style="list-style-type: none"> ○ Assess applicability of the performance measures for improving operations. <ul style="list-style-type: none"> ● Development: <ul style="list-style-type: none"> ○ Identify data inputs (sources) that can be used for multimodal performance measurement. ○ Identify desired event codes and coordinate with the controller vendor to add. This list of event codes should be shared with the Enhanced Traffic Signal Performance Measures Pooled Fund Study that is updating event codes for all vendors. ○ Using available event codes cited in the Indiana Traffic Signal Hi Resolution Data Logger Enumerations and any added by the controller vendor, develop calculations for performance measures. ○ Program the calculations into visual charts using the selected coding method. ● Verification and Integration: <ul style="list-style-type: none"> ○ Configure signalized intersections with TSP, rail preemption, pedestrian detection, and/or bicycle detection into the ATSPM system at up to 10 intersections. ○ Locations should be selected in coordination with ongoing projects and technology installations. ● Deployment and Evaluation <ul style="list-style-type: none"> ○ Use the metrics to evaluate operations and safety of transit, pedestrians, and bicyclists at the available intersections. ○ Recommend adjustments that could improve conditions and help address the following: <ul style="list-style-type: none"> ▪ Are there signal timing adjustments that would optimize TSP? ▪ Are there signal timing adjustments that would optimize operations before/during preemption? ▪ Should signal timing strategies be considered to separate pedestrians from other modes (i.e. protected turns, LPIs, etc.)? ▪ Should signal timing strategies be considered to separate bicyclists from other modes (i.e. protected turns, LBIs, etc.)? ▪ Are there signal timing adjustments that would reduce variability in speeds?
<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 amendment.</p>
<p>Total Programmed Amount:</p>	<p>The federal award is \$619,136 plus a required local match of \$70,863 for a total programming amount of \$690,000</p>
<p>Added Notes:</p>	<p>The Metro TSMO Funding Award Letter Summary is shown on the next page. The complete award letter is included as Attachment 1</p>



Memo

Date: Jan. 2, 2020
 To: TPAC and Interested Parties
 From: Caleb Winter, TSMO Program Manager, Senior Transportation Planner
 Subject: TSMO Sub-allocation for FFY19-21

Memo Purpose

Share TransPort's Transportation System Management and Operations (TSMO) project recommendations from the 2019 TSMO Project Solicitation (2019-2021 MTIP).

Overview

TransPort is the Subcommittee of TPAC that plays a key role in advancing TSMO projects. TransPort updates the criteria based on the current TSMO strategy and regional policy priorities. Metro leads the TSMO solicitation and review process. TransPort recommends projects for funding.

Lead agency	Project name	Project type	TSMO Federal Portion
City of Portland	Traffic Signal Communications	Data communications through fiber optics	\$227,196
City of Portland	Local Traffic Signal Controller Replacement	ATCs	\$840,435
City of Portland	Regional Traffic Signal System Performance Measures	Traffic Signal Performance Measures for Active Transportation	\$619,137
Clackamas County	Clackamas County Regional ATC controller & Signal Optimization Project	ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville	\$735,878

Project 4	Tualatin Valley Hwy Transit & Development Project (New Project)		
Lead Agency:	Metro		
ODOT Key Number:	New TBD	MTIP ID Number:	New TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> Quick Amendment Summary: The formal amendment adds the new planning project to the MTIP which will lead to the development of a preferred alignment for future construction of pedestrian improvements along the OR8 corridor. Metro UPWP Project: Yes Proposed improvements: The planning is intended to be a two-year study through the OR8 corridor between Beaverton and Forest Grove in Washington County and will complete various corridor development planning activities including developing an equitable development strategy (EDS) and a 		


locally preferred alternative (LPA) for a transit project, alternative analysis for a preferred alignment, and evaluate potential street and pedestrian improvements.

- Source: **New project.**
- Amendment Action: Add the new project to the 2021-26 MTIP enabling it to move forward and obtain its FTA Transit Award Management System (TrAMS) grant approval for the awarded FTA HOP
- Funding:
The funding for the project consists of federal Metro allocated STBG funds from the UPWP program totaling \$690,918, and a FTA Helping Obtain Prosperity for Everyone (HOPE) discretionary grant totaling \$850,000. Local matching and overmatching funds from Metro and Washington County have been committed as well. Including local funds, the total project funding commitment totals \$2,523,723 supporting the two-year study.
- FTA Conversion Code: 5307 for the STBG funds. The STBG funds will require flex-transfer to FTA. Note: The HOPE grant is being programmed using the "FTA Other" programmatic fund type code for the project. The project is expected to move through the FTA expenditure process and utilize the FTA Transit Award Management System (TrAMS) to obligate and expend the federal funds.
- Location, Limits and Mile Posts:
 - Location: Along and through the OR8 Corridor from
 - Cross Street Limits: Approximately OR8/US26 in the east and then west through the OR8 corridor to OR47 in Forest Grove
 - Overall Mile Post Limits: Not stated



- Current Status Code: 0 = No activity (for these program funds). The project activity status changes when the awarded project is programmed.
- Air Conformity/Capacity Status:
The Tualatin Valley Hwy Transit & Development Project is a planning project and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning and Technical Studies

	<ul style="list-style-type: none"> • <u>Regional Significance Status:</u> Yes.as a planning project. The projects contains federal funds, impacts the State Highway System , focuses on a major corridor, and will support ongoing efforts to improve pedestrian travel modes and mobility improvements • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: No. ○ Metro approval date: Tentatively scheduled for November 4, 2021.
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The Tualatin Valley Hwy Transit & Development Project is an approved SFY 2022 Metro approved UPWP project. Because of the inclusion of FTA based federal funds via the HOPE grant the project will progress through the FTA expenditure approval process involving TrAMS. A flex transfer of the awarded STBG funds to FTA will be required.</p> <p>The Tualatin Valley (TV) Highway transit and development project creates a collaborative process with the surrounding communities and relevant jurisdictions to prioritize transportation projects, building on recent work undertaken by Washington County</p> <p>The project’s first major task was to establish a steering committee that includes elected officials and community- based organizations (CBOs) that represent communities of color and other marginalized communities within the study area. This group is responsible for developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project. The committee’s work is informed by input gathered through public engagement efforts that include targeted outreach to communities of concern</p> <p>For the transit LPA, the project will advance conceptual designs enough to apply for entry to federal project development, which may include analysis of alternatives for roadway design, transit priority treatments, transit station design and station placement. This effort will be informed by a travel time and reliability analysis which would utilize traffic modeling software as appropriate, as well as an evaluation of the feasibility of using articulated electric buses in the corridor.</p> <p>Typical project activities include coordinating and facilitating the project steering committee, jurisdictional partner staff meetings, and the community engagement program; developing the equitable development strategy; and undertaking design work and analysis related to the locally preferred transit project.</p>
<p>Additional Details:</p>	<p>Shown on the next page is a summary of the FTA HOPE grant for reference</p>

	<div style="text-align: center;">  <p>Helping Obtain Prosperity for Everyone (HOPE) Program NOFO</p> </div> <p><u>Overview</u></p> <p>Rural transportation networks play a vital role in supporting our national economic vitality. In keeping with the U.S. Department of Transportation’s focus on addressing the deteriorating conditions and disproportionately high fatality rates on our rural transportation infrastructure, FTA’s Helping Obtain Prosperity for Everyone (HOPE) Program supports projects that will address the transportation challenges faced by areas of persistent poverty.</p> <p>HOPE supports planning, engineering and technical studies or financial planning to improve transit services in areas experiencing long-term economic distress. It will also support coordinated human service transportation planning to improve transit service or provide new services such as rides to opioid abuse recovery and treatment. An area of persistent poverty is a county with 20% or more of the population living in poverty over the 30 years preceding the date of enactment of the Further Consolidated Appropriations Act, 2020, or December 20, 2019, as measured by the 1990 and 2000 decennial census and the most recent Small Area Income and Poverty Estimates.</p> <p><u>Objectives</u></p> <p>The HOPE Program supports projects that will improve transit services or facilities in areas of persistent poverty through planning, engineering, or development of technical, or financing plans for projects.</p> <p>Applicants are encouraged to work with non-profits or other entities of their choosing to develop an eligible project.</p> <p>The HOPE Program is intended to help areas of persistent poverty:</p> <ul style="list-style-type: none"> • Reduce fatality rates on rural transportation infrastructure • Increase access to jobs and healthcare through enhanced transit options and improved facilities
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO MTIP and STIP amendment Matrix, adding a new project to the MTIP requires a formal/full amendment</p>
<p>Total Programmed Amount:</p>	<p>The programmed amount total for the project includes \$1,540,918 federal funds \$0 state funds, and \$982,805 of local funds for a total programmed amount of \$2,523,723</p>
<p>Added Notes:</p>	<p>Sub-attachments that follow include: FTA HOPE Grant award letter summary</p>

The screenshot shows the Federal Transit Administration website. The main heading is "Fiscal Year 2020 Helping Obtain Prosperity for Everyone (HOPE) Program Projects". Below this is a table with the following data:

State	Project Sponsor	Project Description	Funding
CA	Golden Empire Transit (GET Bus) District	Golden Empire Transit (GET Bus) in Bakersfield will receive funding to introduce advanced-technology fueling systems for its bus fleet. Partnering with CALSTART, GET Bus will assess and determine facility upgrades to deploy on-site hydrogen fuel cell-powered buses to improve air quality and extend bus services throughout the region.	\$160,255
CA	City of Fresno	The City of Fresno will receive funding to plan, design and conduct environmental analyses for construction of a bus transfer station to serve three of the city's express bus routes, as well as area transit providers serving the county's rural communities, neighboring City of Clovis and the regional national park transit provider. The proposed Farner Creek Transit Station will improve transit for underserved residents.	\$648,000
OR	Metro Regional Government (Metro)	The Metro Regional Government (Metro) in Portland, Oregon, will receive funding for studies to advance transit project development on the Tualatin Valley Highway Corridor. Metro will partner with Washington County and TriMet to facilitate engagement with historically disadvantaged communities in the corridor and develop a strategy to minimize and mitigate displacement in high poverty areas.	\$850,000
PA	Southeastern Pennsylvania Transportation Authority (SEPTA)	The Southeastern Pennsylvania Transportation Authority (SEPTA) will receive funding to plan and design a comprehensive upgrade of transportation infrastructure on the Grays Avenue Corridor, which provides critical transportation connections from one of Philadelphia's poorest	\$495,000

Project 5	Westside Trail Project Refinement (New Project - Project Development)		
Lead Agency:	Tualatin Hills Parks and Recreation District (THPRD)		
ODOT Key Number:	22475	MTIP ID Number:	New TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> Quick Amendment Summary: The formal amendment adds the ODOT awarded project from the 2021-24 Oregon Community Paths Program with a federal award of \$572,477 to THPRD to complete study/project development actions supporting trail sections #14-18 of the Western Train Master Plan. <p>Added note; the grant award is \$572,477 and not 527,477 as shown in the OTC grant award list. ODOT has corrected the discrepancy</p> <ul style="list-style-type: none"> Metro UPWP Project: No. The primary scope of work appears to focus in project development Pre-NEPA/Pre PE phase requirements to enable the project to move directly forward into the PE phase after completion of the refinement study. This makes the project more of project development action which is not considered part of the UPWP. The ODOT Local Agency Liaison (LAL) will assess the scope of work and provide Metro with any required programming changes. 		

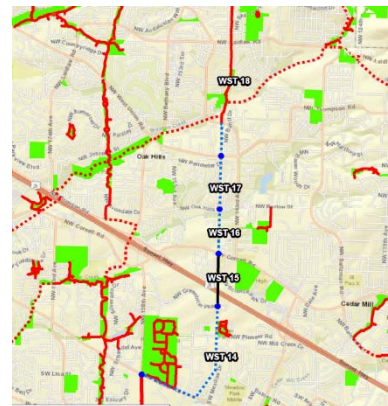
- **Proposed improvements:**
The planning project will complete a refinement study to lay the foundation for closing a critical 2.3 mile gap in the Westside Trail (SW Walker Rd and NW Kaiser Rd) in Washington County. The study will identify the preferred alignment and master plan for this portion of the trail.
- **Source:** **New project.**
- **Amendment Action:** Add the new planning study to the 2021-26 MTIP.
- **Funding:**
The funding for the project was awarded funding from the ODOT 2021-24 Oregon Community Paths Program. The grant award is federal and is expected to be sourced from State Transportation Alternatives (TA).

Oregon Community Paths Program (Page 1 of 2)
Recommended Oregon Community Paths Projects for Approval

Project Priority	Applicant	Project Title	Project Type	Requested Funding	Funds requested	Local Match
1	Wasco County (NWCPRD)	Mill Creek Greenway	Construction	Federal	\$2,624,206	\$300,352
2	ASHLAND PARKS AND RECREATION COMMISSION	Kestrel Park Bridge - Bear Creek Greenway Extension	Construction	Federal	\$498,002	\$56,999
3	Astoria, City of	Riverwalk Trail Continuation of Lighting East for Increased Pedestrian Use and Safety	Construction	Federal	\$844,843	\$96,696
4	City of Tualatin	Tualatin River Greenway Trail Extension	Construction	MAT Fund	\$1,055,889	\$452,528
5	City of Hermiston	Belt Park Greenway Trail	Construction	Federal	\$266,498	\$30,502
6	City of Independence	South Willamette River Trail Refinement	Project Refinement	Federal	\$107,676	\$12,324
7	Tualatin Hills Park & Recreation District	Westside Trail Segments 14-18 Master Plan (Preferred Alignment)	Project Refinement	Federal	\$527,477	\$65,523
8	Salmonberry Trail Foundation/ Barkwood Beach	Barkwood Beach	Construction	Federal	\$1,576,662	\$180,000

Grant award is \$572,477 and not 527,477

- **FTA Conversion Code:** N/A – Does not apply
- **Location, Limits and Mile Posts:**
 - Location: In Washington County east of Hillsboro
 - Cross Street Limits: Approximately on NW Walker Rd at 185th Ave south of US26 and then north to NW Kaiser Rd connecting into Segment 18 of the Westside Trail
 - Overall Mile Post Limits: Not applicable



- **Current Status Code:** 0 = No activity (for these program funds). The project activity status changes when the awarded project is programmed.
- **Air Conformity/Capacity Status:**
The Westside Trail Project Refinement project study is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning and Technical Studies. Some project development activities

	<p>may be included as deemed are eligible under the Pre-NEPA, Pre-PE phase requirements (e.g. design up to 30%, development of preliminary cost assessments, etc.). The activities do not impact the exemption status.</p> <ul style="list-style-type: none"> • <u>Regional Significance Status:</u> Yes as a planning project to improve pedestrian travel modes and mobility improvements. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0991 ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: Yes, May 2021. ○ Metro approval date: Tentatively scheduled for November 4, 2021.
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the OTC approved project from the 2021-24 Oregon Community Paths Program. The grant award is \$572,477.</p> <p>The Westside Trail will be a 25-mile multi-use regional path that will connect communities from King City to Portland. Already almost 8 miles of the trail are complete in Tualatin Hills Park & Recreation District. THPRD is proposing a project refinement study that will lay the foundation for closing a critical 2.3-mile trail gap in a highly urbanized area. The proposed study will identify the preferred alignment and master plan for the remaining portions of Westside Trail Segments 14-18.</p>
<p>Additional Details:</p>	<p>Oregon’s Community Paths (OCP) program is a new competitive grant program that supports investments in walking and biking facilities that are “off system,” meaning transportation facilities that are not primarily on or along a roadway. Off-system facilities are multi-use paths or trails that serve a transportation function. Examples include a path along a greenway, on an old rail line, between housing developments or areas that are not otherwise within the public road right-of-way. These facilities provide high quality, safe and comfortable walking and biking within and between communities. The program is funded by both state and federal funding sources. OTC approved the recommended funding awards during their May 2021 meeting.</p>
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO MTIP and STIP amendment Matrix, adding a new project to the MTIP requires a formal/full amendment</p>
<p>Total Programmed Amount:</p>	<p>The programmed amount total for the project includes \$572,477 federal funds and a local match of \$65,523 of local funds for a total programmed amount of \$638,000.</p>
<p>Added Notes:</p>	<p>Included as attachment 2 is the OTC item staff report</p>

Oregon Community Paths Program (Page 1 of 2)
Recommended Oregon Community Paths Projects for Approval

Project Priority	Applicant	Project Title	Project Type	Requested Funding	Funds requested	Local Match
1	Wasco County (NWCPRD)	Mill Creek Greenway	Construction	Federal	\$2,624,206	\$300,352
2	ASHLAND PARKS AND RECREATION COMMISSION	Kestrel Park Bridge - Bear Creek Greenway Extension	Construction	Federal	\$498,002	\$56,999
3	Astoria, City of	Riverwalk Trail Continuation of Lighting East for Increased Pedestrian Use and Safety	Construction	Federal	\$844,843	\$96,696
4	City of Tualatin	Tualatin River Greenway Trail Extension	Construction	MAT Fund	\$1,055,899	\$452,528
5	City of Hermiston	Belt Park Greenway Trail	Construction	Federal	\$266,498	\$30,502
6	City of Independence	South Willamette River Trail Refinement	Project Refinement	Federal	\$107,676	\$12,324
7	Tualatin Hills Park & Recreation District	Westside Trail Segments 14-18 Master Plan (Preferred Alignment)	Project Refinement	Federal	\$527,477 \$572,477	\$65,523
8	Salmonberry Trail Foundation/ Rockaway Beach	Rockaway Beach	Construction	Federal	\$1,576,556	\$180,444
9	City of Eugene	Eugene Berkeley Park Path	Construction	Federal	\$490,666	\$56,159
10	Corvallis, City of	Tunison Community Path	Project Refinement	Federal	\$497,104	\$56,896
11	Madras, City of	Juniper Hills to Madras East Trails Multiuse Connection Project	Construction	MAT Fund	\$168,000	\$72,000
12	City of Chiloquin	Chiloquin Community Safe and Healthy Connections	Construction	Federal	\$456,300	\$52,225
13	Washington County LU&T	Reedville Trail	Construction	MAT Fund	\$1,542,800	\$661,200
14	City of La Grande	City of La Grande Critical Link Project Refinement	Project Refinement	Federal	\$134,595	\$15,405
15	City of Ontario	Ontario North-South Connector	Project Refinement	Federal	\$67,298	\$7,703
16	Confederated Tribes of the Umatilla Indian Reservation	Tribal Services Center Access Path	Construction	MAT Fund	\$192,349	\$82,435
17	City of Warrenton	Tansy Point Connection NW 11th Path	Project Refinement	Federal	\$93,319	\$10,681

Note: The funding award for THPRD is \$572,477 and not \$527,477 as listed in the funding chart above

Project 6		OR47/OR8/US30 Curb Ramps (New Project)	
Lead Agency:	ODOT		
ODOT Key Number:	22435	MTIP ID Number:	New TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> Quick Amendment Summary: The amendment adds the new ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. The project programming totals \$6,330,298 and will provide ADA standard curbs and ramps long multiple locations on OR47, US30 and OR8. Metro UPWP Project: No Proposed improvements: At approximately 22 locations on OR47, OR8, and US30, construct to ADA standards curbs and ramps as part of the ODOT/AOCIL settlement to help reduce mobility barriers and make state highways more accessible to disable persons Source: New project. Amendment Action: Add the new federally funded project to the 2021-26 MTIP. 		

	<ul style="list-style-type: none"> • Funding: ODOT will use federal funds to complete the project. Initial programming is with the Advance Construction fund type code placeholder. The federal funding committed to the project is \$5,860,176 • Location, Limits and Mile Posts: <ul style="list-style-type: none"> ○ Location: OR47, OR8, and US30 at approximately 22 identified site locations. ○ Cross Street Limits: Various ○ Overall Mile Post Limits: <ul style="list-style-type: none"> ▪ OR47 = MP 17.88 to MP 90.59 ▪ US30 = 46.66 to MP 48.40 • Current Status Code: 3 = (PE) Preliminary Engineering (NEPA) activities initiated • Air Conformity/Capacity Status: The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature. • Regional Significance Status: Yes. The project includes federal funds and is located on various locations in the Motor Vehicle modeling network • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0786 ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: Yes. ○ Metro approval date: Tentatively scheduled for November 4, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. It is one of several similar ADA curbs and ramps project ODOT is moving forward towards construction. Three additional ADA curbs and ramps projects are included in this amendment bundle.</p> <p>The project was originally submitted in May, but sipped through the programming process. ODOT’s delivery timing targeted a PE obligation before the end of FY 2021. Consultation with FHWA occurred and a programming exception was requested. Since the projects is a non-capacity enhancing project focused on safety improvements, and is exempt for air quality conformity analysis, FHWA granted a programming exception allowing the PE to move forward and be obligated at the end of FFY 2021 without the project being programmed. The October Formal Amendment</p>

completes the programming action for the ADA improvement project. OTC approval was originally required for the project which occurred back in March of 2021. Several of the site locations are outside of Metro’s MPA Planning Boundary.

Additional Details:

Identified project locations are shown below:

Locations							
Route	Highway	MP Begin	MP End	Length	Street	City	County
OR-47	029 TUALATIN VALLEY HIGHWAY	17.88	19.38	1.50		FOREST GROVE	WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	20.21	20.29	0.08			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	19.95	19.96	0.01			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	19.44	19.56	0.12			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	19.39	19.43	0.04			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	20.30	20.40	0.10			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	21.08	21.60	0.52			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	19.97	20.20	0.23			WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	19.57	19.94	0.37			WASHINGTON

OR-47	029 TUALATIN VALLEY HIGHWAY	25.37	25.71	0.34		GASTON	WASHINGTON
OR-47	029 TUALATIN VALLEY HIGHWAY	25.73	26.54	0.81			YAMHILL

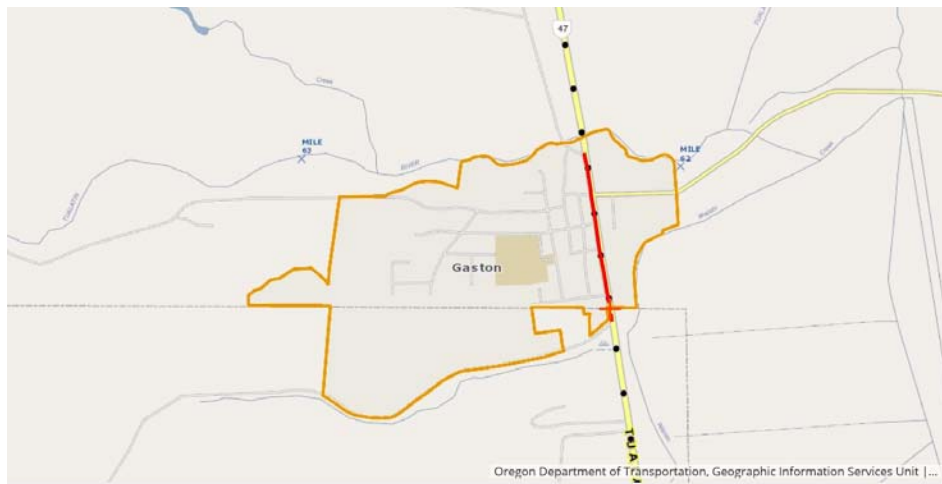
OR-47	029 TUALATIN VALLEY HIGHWAY	25.72	25.72	0.00			YAMHILL
OR-47	102 NEHALEM	88.68	88.70	0.02			WASHINGTON
OR-47	102 NEHALEM	88.62	88.66	0.04			WASHINGTON
OR-47	102 NEHALEM	88.67	88.80	0.13			WASHINGTON
OR-47	102 NEHALEM	88.81	90.15	1.34			WASHINGTON
OR-47	102 NEHALEM	88.02	88.52	0.50			WASHINGTON
OR-47	102 NEHALEM	88.54	88.61	0.07			WASHINGTON
OR-47	102 NEHALEM	90.16	90.59	0.43		FOREST GROVE	WASHINGTON
OR-47	102 NEHALEM	88.53	88.53	0.00			WASHINGTON
OR-47	102 NEHALEM	60.87	62.77	1.90		VERNONIA	COLUMBIA
US-30	092 LOWER COLUMBIA RIVER	46.66	48.40	1.74		RAINIER	COLUMBIA

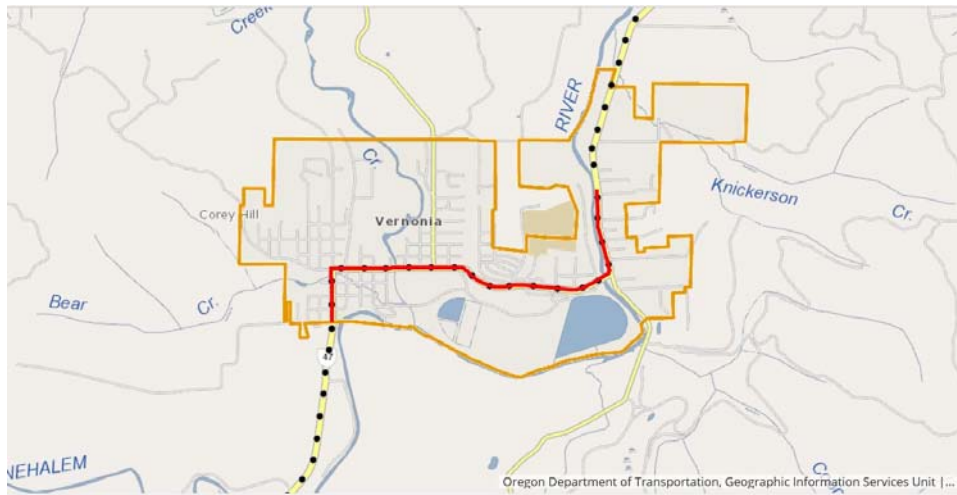
Why a Formal amendment is required? Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal/full amendment complete.

Total Programmed Amount: \$5,680,176 represent the federal fund contribution with \$650,122 of State funds representing the matching contribution. The total programmed amount is \$6,330,298

Added Notes: Included for reference as Attachment 3 is the OTC ADA item staff report

Project Location References are shown below with planned improvement site locations in red.



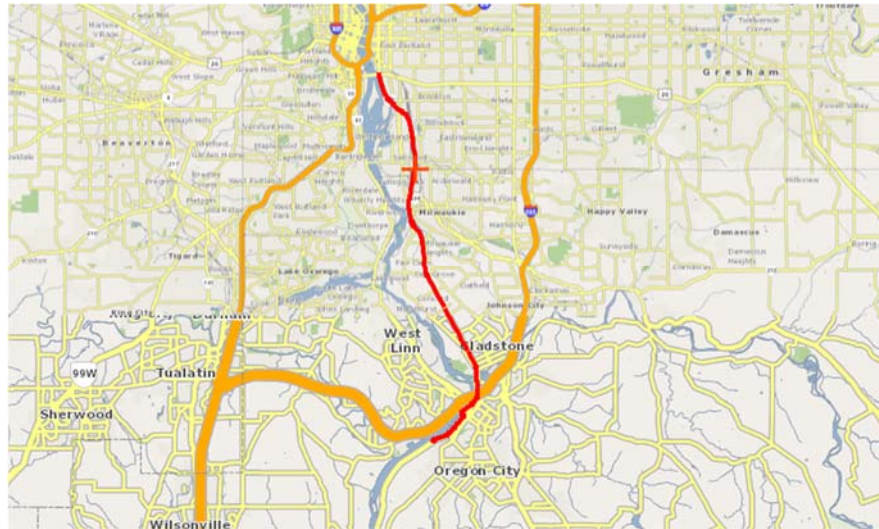


Project 7	US30BY Curb Ramps Group A: N Greeley Ave - I-5 (Portland) (New Project)		
Lead Agency:	ODOT		
ODOT Key Number:	22468	MTIP ID Number:	New TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Quick Amendment Summary:</u> The amendment adds the new ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. The project is located on US30 BY. The programming totals \$2,220,000 and will provide ADA standard curbs and ramp improvements. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along US30BY to reduce mobility barriers and make state highways more accessible to disabled persons • <u>Source:</u> New project. • <u>Amendment Action:</u> Add the new federally funded project to the 2021-26 MTIP. • <u>Funding:</u> ODOT will use federal funds to complete the project. Initial programming is with the Advance Construction fund type code placeholder. The federal funding committed to the project totals \$1,992,007 • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: US30BY in MW Portland ○ Cross Street Limits: North Greeley Ave to I-5 ○ Overall Mile Post Limits: US30BY = MP 4.50 to MP 5.35 		

	<p>These specific ADA curb and ramp improvements are planned on US30BY between Greeley Ave and I-5.</p> <table border="1" data-bbox="534 296 1378 596"> <thead> <tr> <th colspan="8">Locations</th> </tr> <tr> <th>Route</th> <th>Highway</th> <th>MP Begin</th> <th>MP End</th> <th>Length</th> <th>Street</th> <th>City</th> <th>County</th> </tr> </thead> <tbody> <tr> <td>US-30BY</td> <td>123 NORTHEAST PORTLAND</td> <td>5.33</td> <td>5.35</td> <td>0.02</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> <tr> <td>US-30BY</td> <td>123 NORTHEAST PORTLAND</td> <td>4.50</td> <td>5.31</td> <td>0.81</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> <tr> <td>US-30BY</td> <td>123 NORTHEAST PORTLAND</td> <td>5.32</td> <td>5.32</td> <td>0.00</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> </tbody> </table>	Locations								Route	Highway	MP Begin	MP End	Length	Street	City	County	US-30BY	123 NORTHEAST PORTLAND	5.33	5.35	0.02		PORTLAND	MULTNOMAH	US-30BY	123 NORTHEAST PORTLAND	4.50	5.31	0.81		PORTLAND	MULTNOMAH	US-30BY	123 NORTHEAST PORTLAND	5.32	5.32	0.00		PORTLAND	MULTNOMAH
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<p>Additional Details:</p>	<p>ODOT and the Association of Oregon Centers for Independent Living, et al. (AOCIL) entered into a 15-year settlement agreement (Agreement) on November 2, 2016, to make state highways more accessible to people with disabilities. The agreement will lead to major improvements to pedestrian accessibility along the highway system including installing missing curb ramps to connect parts of communities that have been difficult or unsafe to access because of an incomplete system and upgrade substandard existing curb ramps to improve mobility and safety along the highways for all users.</p> <p>Key 22468 is the result of the above settlement.</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>\$1,992,007 represents the federal fund contribution with \$227,993 of State funds representing the matching contribution. The total programmed amount is \$2,220,000</p>																																								
<p>Added Notes:</p>	<p>Included for reference as Attachment 3 is the OTC ADA item staff report</p>																																								

<p>Project 8</p>	<p>OR99E Curb Ramps Group A: SE Woodward St -Oregon City (New Project)</p>		
<p>Lead Agency:</p>	<p>ODOT</p>		
<p>ODOT Key Number:</p>	<p>22469</p>	<p>MTIP ID Number:</p>	<p>New TBD</p>
<p>Projects Description:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • Quick Amendment Summary: The amendment adds the new ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. The project is located on OR99E from southern Portland to Oregon City. The programing totals \$5,335,000 and will provide ADA standard curbs and ramp improvements. • <u>Metro UPWP Project:</u> No 		

- **Proposed improvements:**
Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR99E to reduce mobility barriers and make state highways more accessible to disabled persons
- **Source:** New project.
- **Amendment Action:** Add the new federally funded project to the 2021-26 MTIP.
- **Funding:**
ODOT will use federal funds to complete the project. Initial programming is with the Advance Construction fund type code placeholder. The federal funding committed to the project totals \$4,787,095.
- **Location, Limits and Mile Posts:**
 - Location: OR99E from southern Portland to Oregon City
 - Cross Street Limits: On OR99E from approximately South Woodward St in southeastern Portland to 5th St in Oregon City
 - Overall Mile Post Limits: OR99E = MP 1.45 to MP 13.89

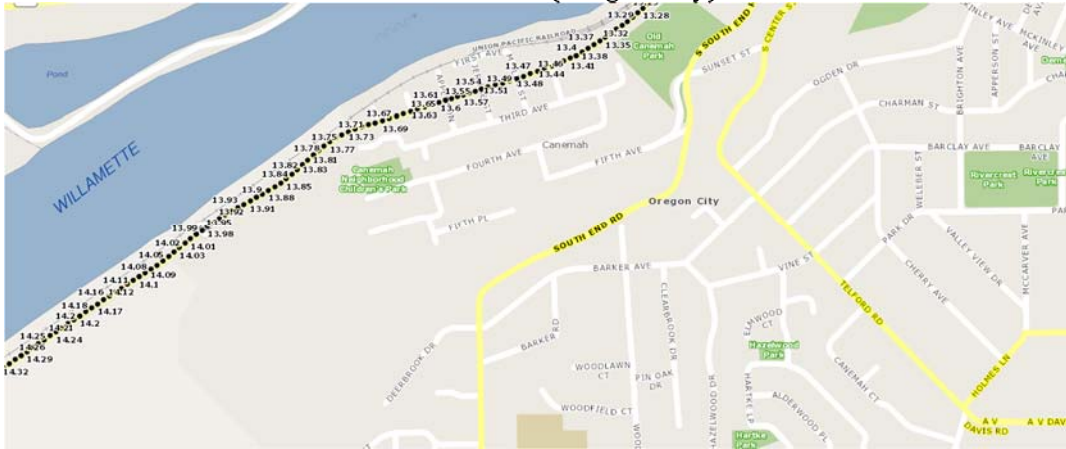


- **Current Status Code:** 4= (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).
- **Air Conformity/Capacity Status:**
The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature.
- **Regional Significance Status:** Yes. The project includes federal funds and is located on OR99E is identified as a Pedestrian Parkway in the Metro Pedestrian modeling network

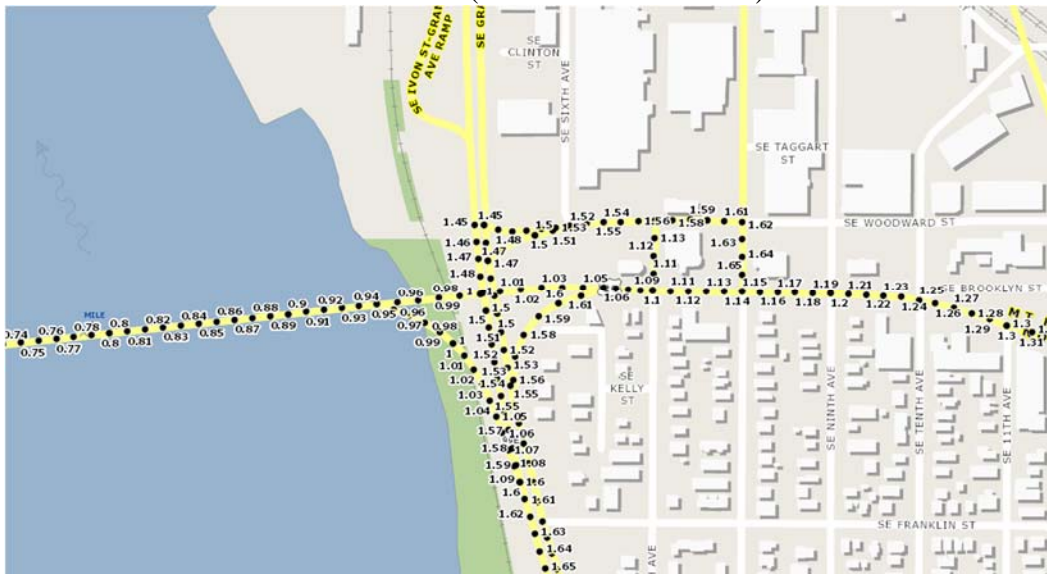
	<ul style="list-style-type: none"> • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0957 ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: Yes. ○ Metro approval date: Tentatively scheduled for November 4, 2021 																																																																
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. ROW, UR, and Construction phases are being programmed through this amendment. The PE phase was completed via Key 22204.</p> <p>ODOT’s ADA improvement plan includes large regional PE phase projects covering multiple routes. Once design and costs are determined for a specific area, ODOT develops the specific implementation project to complete the ADA improvements. This project along with Keys 22468 and 22470 are ADA implementation projects resulting from the PE work completed in Key 22204.</p> <p>These specific ADA curb and ramp improvements are planned on OR99E between SE Woodward Ave and about 5th St in Oregon City</p> <table border="1" data-bbox="641 1045 1263 1402"> <thead> <tr> <th colspan="8">Locations</th> </tr> <tr> <th>Route</th> <th>Highway</th> <th>MP Begin</th> <th>MP End</th> <th>Length</th> <th>Street</th> <th>City</th> <th>County</th> </tr> </thead> <tbody> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>1.45</td> <td>2.33</td> <td>0.88</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>2.34</td> <td>4.57</td> <td>2.23</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>4.59</td> <td>5.71</td> <td>1.12</td> <td></td> <td>MILWAUKIE</td> <td>CLACKAMAS</td> </tr> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>4.58</td> <td>4.58</td> <td>0.00</td> <td></td> <td>PORTLAND</td> <td>MULTNOMAH</td> </tr> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>13.89</td> <td>5.71</td> <td>8.18</td> <td></td> <td>MILWAUKIE</td> <td>CLACKAMAS</td> </tr> <tr> <td>OR-99E</td> <td>081 PACIFIC HWY EAST</td> <td>13.89</td> <td>5.71</td> <td>8.18</td> <td></td> <td>OREGON CITY</td> <td>CLACKAMAS</td> </tr> </tbody> </table>	Locations								Route	Highway	MP Begin	MP End	Length	Street	City	County	OR-99E	081 PACIFIC HWY EAST	1.45	2.33	0.88		PORTLAND	MULTNOMAH	OR-99E	081 PACIFIC HWY EAST	2.34	4.57	2.23		PORTLAND	MULTNOMAH	OR-99E	081 PACIFIC HWY EAST	4.59	5.71	1.12		MILWAUKIE	CLACKAMAS	OR-99E	081 PACIFIC HWY EAST	4.58	4.58	0.00		PORTLAND	MULTNOMAH	OR-99E	081 PACIFIC HWY EAST	13.89	5.71	8.18		MILWAUKIE	CLACKAMAS	OR-99E	081 PACIFIC HWY EAST	13.89	5.71	8.18		OREGON CITY	CLACKAMAS
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Total Programmed Amount:	\$4,787,095 represents the federal fund contribution with \$547,905 of State funds representing the matching contribution. The total programmed amount is \$5,335,000
Added Notes:	Included for reference as Attachment 3 is the OTC ADA item staff report. Expanded site location maps are shown below.

K22469 OR 99E 13.89 to 1.45
 MP start 13.89 (Oregon City)

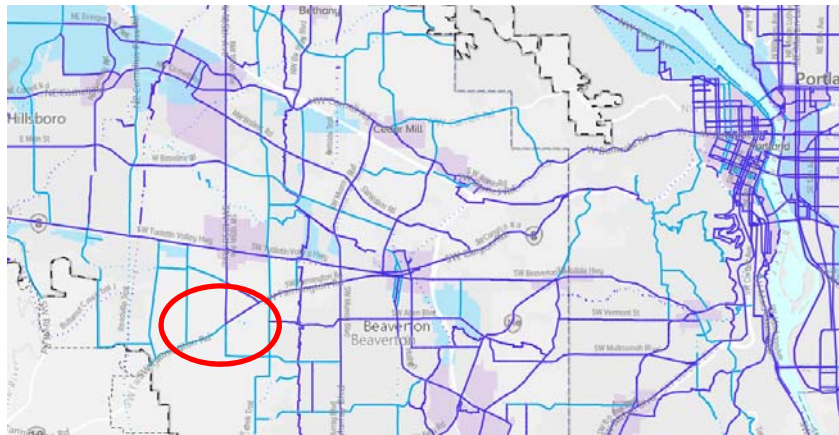


MP end 1.45 (southeastern Portland)



Project 9	OR10 Curb Ramps Group A: SW 198th Ave - SW Kinnaman Rd (New Project)		
Lead Agency:	ODOT		
ODOT Key Number:	22470	MTIP ID Number:	New TBD
Projects Description:	Project Snapshot: <ul style="list-style-type: none"> Quick Amendment Summary: The amendment adds the new ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. The project is located on OR10 from SW 198th Ave to Kinnaman Rd. The programming totals \$1,794,000 and will provide ADA standard curbs and ramp improvements. 		

- Metro UPWP Project: No
- Proposed improvements:
Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR10 to reduce mobility barriers and make state highways more accessible to disabled persons
- Source: [New project.](#)
- Amendment Action: Add the new federally funded project to the 2021-26 MTIP.
- Funding:
ODOT will use federal funds to complete the project. Initial programming is with the Advance Construction fund type code placeholder. The federal funding committed to the project totals \$1,609,756.
- Location, Limits and Mile Posts:
 - Location: On OR10 west of Beaverton
 - Cross Street Limits: Between SW 198th Ave and Kinniman Rd
 - Mile Post Limits: OR99E = MP 5.88 to MP 7.38



- Current Status Code: 4= (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).
- Air Conformity/Capacity Status:
The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature.
- Regional Significance Status: Yes. The project includes federal funds and is located on OR99E is identified as a Pedestrian Parkway in the Metro Pedestrian modeling network

	<ul style="list-style-type: none"> • Amendment ID and Approval Estimates: <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0958 ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: Yes. ○ Metro approval date: Tentatively scheduled for November 4, 2021 																								
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment adds the ODOT ADA curbs and ramps construction project to the 2021-26 MTIP. ROW, UR, and Construction phases are being programmed through this amendment. The PE phase was completed via Key 22204.</p> <p>ODOT’s ADA improvement plan includes large regional PE phase projects covering multiple routes. Once design and costs are determined for a specific area, ODOT develops the specific implementation project to complete the ADA improvements. This project along with Keys 22468 and 22469 are ADA implementation projects resulting from the PE work completed in Key 22204.</p> <p>These specific ADA curb and ramp improvements are planned on OR10 between SW 198th Ave and Kinniman Rd west of Beaverton</p> <table border="1" data-bbox="586 1041 1312 1203"> <thead> <tr> <th colspan="8">Locations</th> </tr> <tr> <th>Route</th> <th>Highway</th> <th>MP Begin</th> <th>MP End</th> <th>Length</th> <th>Street</th> <th>City</th> <th>County</th> </tr> </thead> <tbody> <tr> <td>OR-10</td> <td>142 FARMINGTON</td> <td>5.88</td> <td>7.38</td> <td>1.50</td> <td></td> <td></td> <td>WASHINGTON</td> </tr> </tbody> </table>	Locations								Route	Highway	MP Begin	MP End	Length	Street	City	County	OR-10	142 FARMINGTON	5.88	7.38	1.50			WASHINGTON
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<p>Additional Details:</p>	<p>ODOT and the Association of Oregon Centers for Independent Living, et al. (AOCIL) entered into a 15-year settlement agreement (Agreement) on November 2, 2016, to make state highways more accessible to people with disabilities. The agreement will lead to major improvements to pedestrian accessibility along the highway system including installing missing curb ramps to connect parts of communities that have been difficult or unsafe to access because of an incomplete system and upgrade substandard existing curb ramps to improve mobility and safety along the highways for all users.</p> <p>Key 22470 is the result of the above settlement.</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>\$4,787,095 represents the federal fund contribution with \$547,905 of State funds representing the matching contribution. The total programmed amount is \$5,335,000</p>																								
<p>Added Notes:</p>	<p>Included for reference as Attachment 3 is the OTC ADA item staff report. Expanded site location maps are shown below.</p>																								

Key 22470 Locations Summary



<p>Project 10</p>	<p>NW 112th Street and PNWR Rail Crossing Upgrades (New Project)</p>		
<p>Lead Agency:</p>	<p>ODOT</p>		
<p>ODOT Key Number:</p>	<p>22440</p>	<p>MTIP ID Number:</p>	<p>New - TBD</p>
<p>Projects Description:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Quick Amendment Summary:</u> The amendment adds the new rail at-grade crossing safety improvement to the 2021-26 MTIP. The project will add active warning devices to the railroad-highway crossing to decrease the probability of future rail crossing incidents. Project programming totals \$1,235,000. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project will replace passive safety warning devices with active warning devices to decrease future rail crossing incidents with motor vehicles and truck traffic • Source: New Project. • <u>Amendment Action:</u> Add the new safety improvement project to the MTIP. • <u>Funding:</u> The funding is federal Surface Transportation Block Grant (STBG) funds. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: At NW112th Ave and the PNWR railroad crossing in NW Portland ○ Cross Street Limits: Near NW 112 Ave and US30 ○ Overall Mile Post Limits: US30 at MP 8.55 <div data-bbox="609 1371 1284 1837" data-label="Image"> </div>		



- Current Status Code: 0 = No activity (for these program funds)
- Air Conformity/Capacity Status:
The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Other - Planning activities conducted pursuant to titles 23 and 49 U.S.C.
- Regional Significance Status: N/A
- Amendment ID and Approval Estimates:
 - STIP Amendment Number: TBD
 - MTIP Amendment Number: OC22-01-OCT
 - OTC approval required: Yes.
 - Metro approval date: Tentatively scheduled for November 4, 2021

What is changing?

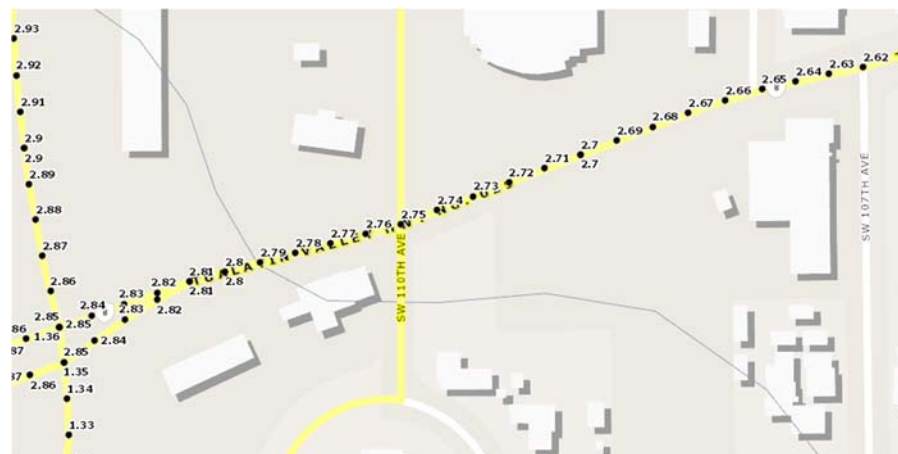
AMENDMENT ACTION: ADD NEW PROJECT

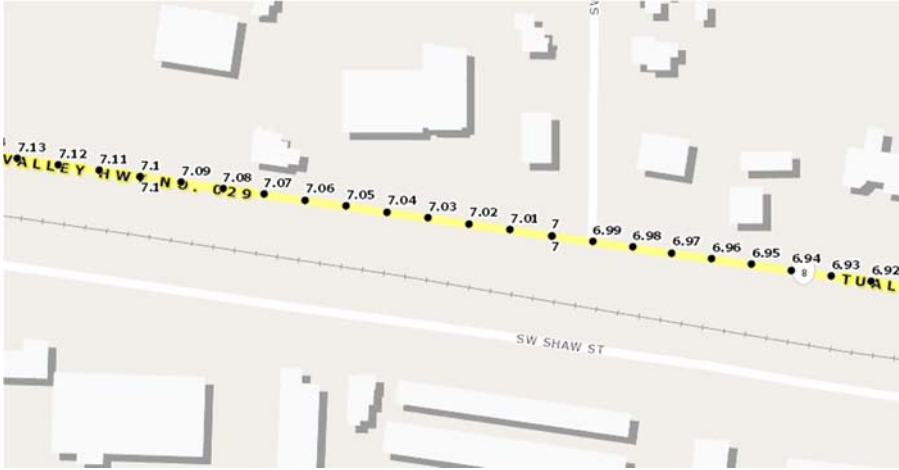
The formal amendment adds the ODOT NW112th Street at railroad crossing safety improvement project to the 2021-26 MTIP. The project replaces passive warning devices with active warning devices at a location which includes the movement of mixed commodities and hazardous materials to decrease future rail crossing incidents with motor vehicles and

	<p>truck traffic. OTC approval was required and occurred during their September 2021 meeting.</p> <p>The operating railroad in PNWR which moves mixed commodities including High Hazard Flammable and Inhalation Hazard. HAZMAT Cars are frequently stored near this crossing. There is substantial truck traffic over the crossing. In 2015 a pickup truck was hit by a train while crossing and in 1977 a semi-truck was hit by a train at this crossing. There are three sets of track with 35' measured between outside rails. The crossing was identified as a probable location of a future rail incident if left with only passive warning devices.</p>
Additional Details:	<p>The MTIP programming is a little different from other projects. The railroad will implement and complete the safety upgrades with ODOT overseeing the project. As such the safety improvements are being programmed in the MTIP's "Other" phase. The project includes a small Utility Relocation Phase (UR). However, the MTIP does not include multiple "Other" phases. The UR phase and the Other phase with the safety improvements had to be combined together. Programming in the the STIP will reflect the Other and UR phases separately.</p>
Why a Formal amendment is required?	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal/full amendment complete.</p>
Total Programmed Amount:	<p>The committed federal funds total \$1,111,500 with the State match at \$123,500. The total programmed amount is \$1,235,000</p>
Added Notes:	<p>The OTC item is included as Attachment 4.</p>

Project 11	<p>OR8: SW Short Ave - SW 110th Ave (Beaverton) OR8: SW 192 Ave - SW 110th Ave</p>		
Lead Agency:	<p>ODOT</p>		
ODOT Key Number:	<p>18794</p>	MTIP ID Number:	<p>70766</p>
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> <p><u>Quick Amendment Summary:</u> The construction phase from Key 18839 which is a prior obligated project (obligated in 2020) and is being re-added into the active 2021-2026 as new funds resulting in Key 18839 being combined into Key 18794. Due to bid issues with Key 18839, the funds were de-obligated and then made available to be combined into Key 18794. As a result the project name, description and funding elements are being updated through this amendment. Both Key 18839 and 18794 will be delivered under a single contract for increased delivery efficiencies.</p> <p><u>Metro UPWP Project:</u> No</p> 		

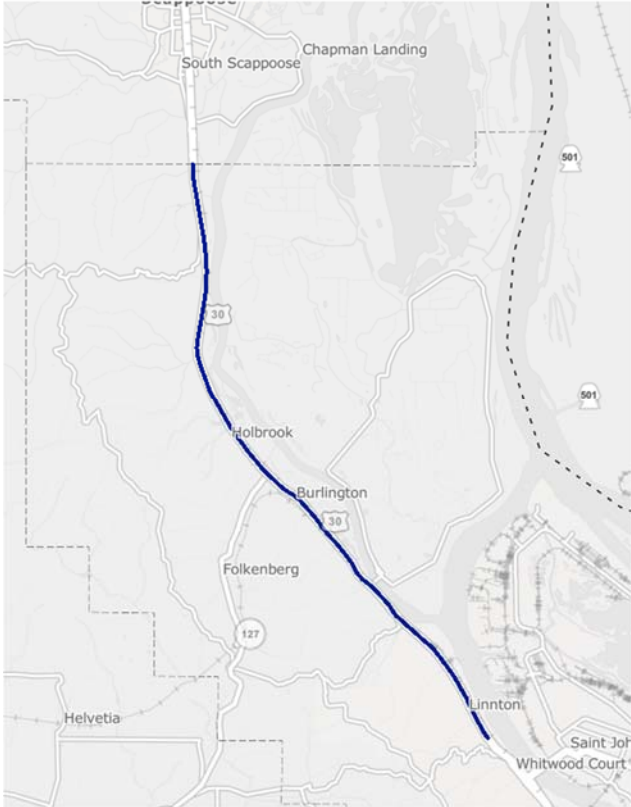
- **Proposed improvements:**
The project still is a safety improvement project but now the scope is expanded along with the limits. The project now will complete safety upgrades to install larger signal heads, reflective backboards, pedestrian countdown signals and left turn phasing plus sidewalk infill and improvements, bus stop relocations, bus pads, & enhanced pedestrian crossing at SW 192nd Ave-SW 165th Ave.
- **Source:** Existing project.
- **Amendment Action:** Because Key the funds for Key 18839 were already obligated, the project not carried over into the 2021-26 MTIP, and the fund then were de-obligated, the combining effort results in adding new funds and a scope expansion to Key 18794.
- **Funding:**
The funding includes federal Highway Safety Improvement Program funds along with State Surface Transportation Block Grant funds (State STBG). The total federal commitment to the project is \$3,887,950.
- FTA Conversion Code: N/A
- **Location, Limits and Mile Posts:**
 - Location: Revised on OR 8 from Beaverton west to SW 192nd Ave
 - Cross Street Limits: East of SW 107th Ave and then west to abut SW192nd Ave
 - Overall Mile Post Limits: OR8 MP 2.70 to MP 7.03



	 <ul style="list-style-type: none"> • <u>Current Status Code:</u> 5 = (RW) Right-of-Way activities initiated including R/W acquisition and/or utilities relocation. • <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> Yes. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: TBD ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: Yes. ○ Metro approval date: Tentatively scheduled for November 4, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: COMBINED PROJECT</u></p> <p>The formal amendment combines the scope and construction funds from Key 18839 into Key 18794. As a result, the project name, description, and limits are updated as well. ODOT determined that combining the two projects will enable them to be delivered more efficiently.</p>
<p>Additional Details:</p>	<p>Combining the construction phase funds from a prior obligated project represents adding new funds to the project and completing a scope change. The total project cost for Key 18794 increases from \$3,029,007 to \$4,027,927. The cost change represents a \$32.81% cost change which exceeds the 20% threshold triggering the need for a formal amendment.</p>
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding new funds above the 20% threshold involving a major scope change requires a formal/full amendment complete.</p>

Total Programmed Amount:	The adjusted committed federal funds now total \$3,887,950, with the State match is \$135,977. The total programmed amount is \$4,027,927.
Added Notes:	N/A

Project 12	US30: Watson Rd - NW Hoge Ave		
Lead Agency:	ODOT		
ODOT Key Number:	21779	MTIP ID Number:	71198
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • Quick Amendment Summary: The formal amendment splits the scope and funding from Key 21779 and combines it into Key 21128 which is being re-added to the MTIP as part of this amendment bundle. Key 21779 is left as a zero programmed project in the MTIP. Implementation is through Key 21128. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project proposed to repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Key 21128 is being re-added to the MTIP to allow Key 21779 (this project) to be combined with it. Through this action, the project scope will be combined and delivered as a single project under Key 21128. • <u>Funding:</u> The funding includes federal National Highway Performance Program (NHPP) funds. The total programming commitment is \$1,524,000 which will be reduced to \$0 in Key 21779 through the combining action. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Revised on US30 ○ Cross Street Limits: ○ Overall Mile Post Limits: US30 = MP 7.80 to MP 18.37 		

	 <ul style="list-style-type: none"> • <u>Current Status Code:</u> 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) • <u>Air Conformity/Capacity Status:</u> The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature. • <u>Regional Significance Status:</u> Yes. • <u>Amendment ID and Approval Estimates:</u> <ul style="list-style-type: none"> ○ STIP Amendment Number: 21-24-0701 ○ MTIP Amendment Number: OC22-01-OCT ○ OTC approval required: No ○ Metro approval date: Tentatively scheduled for November 4, 2021
<p>What is changing?</p>	<p><u>AMENDMENT ACTION: SPLIT/CANCEL PROJECT</u></p> <p>The formal amendment splits the scope and funding and will combine it into Key 21128 (project #13 this amendment bundle). Key 21779 will be delivered as a single project with Key 21128. As a result programming for Key 21779 decreases to \$0.</p>
<p>Additional Details:</p>	

	Splitting the scope and combining it into Key 21128 requires a formal amendment because, Key 21128 had been obligated during the 2018-21 MTIP and was not carried over into the 2021-26 MTIP. Construction bid issues arose preventing Key 21128 from being implemented. During this time, ODOTO determined that Key 21779 and Key 21128 could be combined under a single contract. Key 21128 is now being re-added to the MTIP with the combined Key 21779 as shown in project #13.
Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, re-adding key 21128 constitutes adding a new project to the 2021-26 MTIP which requires a formal/full amendment complete.
Total Programmed Amount:	The splits results in Key 21779 decreasing from \$1,524,000 to \$0.
Added Notes:	N/A

Project 13	US30: Watson Rd - Hoge Ave (Add/Combine New Project)		
Lead Agency:	ODOT		
ODOT Key Number:	21128	MTIP ID Number:	71024
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • Quick Amendment Summary: The formal amendment re-adds Key 21128 and combines it with Key 21779. Both projects address needed culvert repair on US30 and will now be delivered under a single contract. • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> The project proposed to repair or replace culverts in poor condition along this corridor to ensure to prevent further damage and possible collapse. • <u>Source:</u> Existing project. • <u>Amendment Action:</u> Key 21128 is being re-added to the MTIP and is combined with Key 21779. • <u>Funding:</u> The funding includes federal National Highway Performance Program (NHPP) funds, TFIA federal redistribution funds, and Advance Construction. The total programming commitment is \$1,720,000. • FTA Conversion Code: N/A • <u>Location, Limits and Mile Posts:</u> <ul style="list-style-type: none"> ○ Location: Revised on US30 		

- Cross Street Limits: Hoge Ave in NW Portland and then north on US30 to Watson Rd
- Overall Mile Post Limits: US30 = MP 7.80 to MP 18.37



- **Current Status Code:** 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated).
- **Air Conformity/Capacity Status:**
The project is considered a “non-capacity enhancing” project from a roadway/motor vehicle improvement perspective and is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 - Projects that correct, improve, or eliminate a hazardous location or feature.
- **Regional Significance Status:** Yes.
- **Amendment ID and Approval Estimates:**
 - STIP Amendment Number: 21-24-1099
 - MTIP Amendment Number: OC22-01-OCT
 - OTC approval required: No
 - Metro approval date: Tentatively scheduled for November 4, 2021

What is changing?	<p style="text-align: center;"><u>AMENDMENT ACTION: ADD NEW PROJECT</u></p> <p>The formal amendment re-adds Key 21128 and combines it with Key 21779. The project involving culvert repairs will be delivered under a single contract this way.</p>
Additional Details:	The project name, description, limits, and scope are updated to reflect the combined project in Key 21128.
Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, re-adding key 21128 constitutes adding a new project to the 2021-26 MTIP which requires a formal/full amendment complete.
Total Programmed Amount:	The programming total for the combined project in Key 21128 is \$1,720,000.
Added Notes:	N/A

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

METRO REQUIRED PROJECT AMENDMENT REVIEWS

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

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

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

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.

APPROVAL STEPS AND TIMING

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

- | <u>Action</u> | <u>Target Date</u> |
|---|-------------------------|
| • Initiate the required 30-day public notification process..... | September 28 2021 |
| • TPAC notification and approval recommendation..... | October 1, 2021 |
| • JPACT approval and recommendation to Council..... | October 21, 2021 |
| • Completion of public notification process..... | October 27, 2021 |
| • Metro Council approval..... | November 4, 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>
• Final amendment package submission to ODOT & USDOT	November 15, 2021
• USDOT clarification and final amendment approval.....	Early December, 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:

JPACT approved Resolution 21-5205, and recommends Metro Council approve the October 2021 Formal Amendment bundle under Resolution 21-5205 consisting of thirteen new or amended projects which impacts Metro, ODOT, Portland, and THPRD.

- TPAC notification and approval recommendation to JPACT: October 1, 2021
- JPACT approval and approval recommendation to Metro Council: October 21, 2021

Attachments: 4

1. Metro TSMO Award Letter
2. OTC Item for THPRD Grant Award
3. OTC March 2021 ADA Agenda Item G
4. OTC Rail Crossing for Key 22440

**Metro**600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: Jan. 2, 2020
To: TPAC and Interested Parties
From: Caleb Winter, TSMO Program Manager, Senior Transportation Planner
Subject: TSMO Sub-allocation for FFY19-21

Memo Purpose

Share TransPort's Transportation System Management and Operations (TSMO) project recommendations from the 2019 TSMO Project Solicitation (2019-2021 MTIP).

Overview

TransPort is the Subcommittee of TPAC that plays a key role in advancing TSMO projects. TransPort updates the criteria based on the current TSMO strategy and regional policy priorities. Metro leads the TSMO solicitation and review process. TransPort recommends projects for funding.

The 2019 TSMO Project Solicitation process included these steps:

- March-July 2019 – TransPort discussed important 2018 RTP policies to develop the criteria that went into the 2019 TSMO Project Solicitation
- August-September 2019 - Solicitation and submissions
- October 2019 – Metro led the review process including screening for meeting minimum requirements, project readiness/risk review and ratings from a group of regional-level reviewers
- November 2019 - TransPort discussion, including GIS exercises to tie intersection investments to TSMO criteria
- November 2019 – Applicants provided revised requests (optional)
- December 11, 2019 – TransPort took action to unanimously recommend the projects below.

For more background, please see the application and guidance still posted at <https://www.oregonmetro.gov/tsmo>.

The 2019 TSMO Solicitation was based on affording projects with an estimated \$4.6M in federal funds. After budget review and accounting for the TSMO program management costs for three years, Metro determined that \$4.7M in federal funds is available for the 2019 TSMO Project Solicitation. Nearly \$7M in requests were received (\$2.3M above available funds).

During the November 13, 2019 TransPort meeting, consensus was to give each applicant the option of tightening budgets and/or scaling down the project. Most of the applicants submitted revised requests. Revised requests, plus those that were not revised, totaled \$6,341,459 in requested TSMO federal funds (\$1.6M above available funds).

Metro Staff created an option for TransPort to discuss at their Dec. 11 using reviewer ratings, GIS analysis of project locations and other input to help scale projects to the \$4.7M of available TSMO federal funds.

Recommended Projects

TransPort recommends projects in two categories. The first involves upgrading the hardware equipment at many signalized intersections across the region with Advanced Traffic Controllers (ATCs). The second category primarily serves region-wide needs. The following describes these categories with select project details. All projects are listed at the end of this memo.

Advanced Traffic Controller Projects

These projects are located at intersections around the region and applicants provided Metro with locations. Metro compared intersections to 2019 TSMO Solicitation criteria as the basis for investment:

- Equity – fund all in 2018 RTP equity focus areas
- Safety – fund all that are at high-injury crash intersections identified by Metro or by local agency’s safety plan, plus signals nearby or serving fire stations
- Reliability for people – fund all related to transit reliability as well as some additional transit-serving intersections, intersections near schools and intersections that provide a foundation for Integrated Corridor Management
- Reliability for goods movement – fund all related to Metro analysis of reliability on freight routes plus some intersections with identified freight demand
- Reliability – fund some intersections that provide a foundation for Integrated Corridor Management
- Partnerships – fund a portion of intersections in cities that are providing local matching funds

The list of lead agencies deploying ATCs is included at the end of this memo.

All Other Project Applications

PSU – PORTAL keeps the funding level close to historic levels for the next three years of enhancing and continuing the regional transportation data archive.

Metro - TSMO Program Plus provides additional support to bring onboard additional professional services to boost both the technical side and communications for the program.

- \$90,000 for planning supportive of extending the 2020 TSMO Strategy update to city, county and related state planning efforts
- \$30,000 for operator policy development, supportive of operator agreements, sharing agreements and similar efforts called for by the 2020 TSMO Strategy
- \$100,000 for research of a range of needs to be identified in the 2020 TSMO Strategy that may include applying a racial equity lens by understanding TSMO related context around changing travelers access and needs; ranging to, Dynamic Traffic Assignment modeling, to understand performance of different operations scenarios.
- \$40,000 for training, supportive of the skills desired by TSMO partners
- \$48,600 for Communications supportive of TSMO partners to do their work communicating the TSMO strategies, solutions and outcomes

City of Portland - Regional Traffic Signal System Performance Measures for active transportation.

City of Portland - Traffic Signal Communications (fiber optics) for connecting signals on NE Holgate east of 82nd Ave.

Two projects received lower ratings and were ultimately lower priorities for TransPort and will not receive funding from the 2019 TSMO recommendation:

- Metro Regional Operations Asset Data ConOps: a planning project to create a virtual layer of signal and signage infrastructure.
- PBOT Rail Safety Crossing Project: batteries to help in the event of power failure.

Next Steps

The steps ahead for concluding the project recommendation process and beginning projects include:

- Metro newsfeed item announcing recommended projects
- TSMO Program staff finalize recommendation letters with conditions of approval
- Winter/Spring - Lead agencies will refine project scopes, draft IGAs, work with Metro and ODOT on MTIP/STIP programming in preparation for FHWA Obligation

Please contact me with any questions at 503-797-1758 or Caleb.Winter@oregonmetro.gov.

Lead agency	Project name	Project type	TSMO Federal Portion
City of Portland	Traffic Signal Communications	Data communications through fiber optics	\$227,196
City of Portland	Local Traffic Signal Controller Replacement	ATCs	\$840,435
City of Portland	Regional Traffic Signal System Performance Measures	Traffic Signal Performance Measures for Active Transportation	\$619,137
Clackamas County	Clackamas County Regional ATC controller & Signal Optimization Project	ATCs in Clackamas County, Gladstone, Lake Oswego, Milwaukie, Oregon City, West Linn, Wilsonville	\$735,878
Metro	Regional TSMO Program Plus	Advancements in planning, training, research and communications	\$285,880
Oregon Department of Transportation	Advanced Traffic Controller (ATC) Deployment Project 99E and Tualatin Valley Highway	ATCs	\$239,507

Lead agency	Project name	Project type	TSMO Federal Portion
Portland State University	Multimodal Transportation Data Archive	Data archiving and enhancements of PORTAL	\$600,000
Washington County	Advanced Traffic Controller (ATC) Optimization Project	ATCs in Washington County, Beaverton, Hillsboro and Tigard	\$1,151,936
<i>Total =</i>			<i>\$4,700,000</i>



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: May 03, 2021

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda I** – *Oregon Community Paths Program FY 2021-24 Awards*

Requested Action:

Approve the Public Transportation Division's (PTD) Oregon Community Paths Program (OCP) FY21-24 grant awards for walking and biking facilities

Background:

Oregon's Community Paths (OCP) program is a new competitive grant program that supports investments in walking and biking facilities that are "off system," meaning transportation facilities that are not primarily on or along a roadway. Off-system facilities are multi-use paths or trails that serve a transportation function. Examples include a path along a greenway, on an old rail line, between housing developments or areas that are not otherwise within the public road right-of-way. These facilities provide high quality, safe and comfortable walking and biking within and between communities.

The program is funded by both state and federal funding sources. The state funding includes the Multi-Modal Active Transportation (MAT) fund, established under [ORS 367.091](#) and consisting of the bicycle excise tax, vehicle privilege tax, and lottery bond funding. The federal funding includes the Federal Highway Administrations (FHWA) transportation alternative (TA) set-aside from the Surface Transportation Block Grant (STBG) program. Additionally, state [Department of Transportation Operating Fund](#) (TOF) funding for FY2021-24 has been allocated to OCP, pending approval of the ODOT's budget by the Oregon Legislative Assembly in July 2021. The various funds each have different program requirements, which affect how projects must be managed and govern overall project requirements.

The OCP program funds two types of pedestrian and bicycle projects:

- 1) **Construction Grants** - Development, construction, reconstruction, resurfacing, or other capital improvement of multiuse paths, bicycle paths, and footpaths that improve access and safety for people walking and bicycling
- 2) **Project Refinement Grants** - Preliminary planning grants to help communities prepare for a later OCP construction grant request.

Off-system paths are popular in communities as they're safe and comfortable walking and biking facilities that serve people of all ages and abilities. Communities in Oregon rely on the the State Highway Fund to pay for the majority of their transportation facilities. However, the State Highway Fund is restricted to projects within the road right-of-way. Many ideal locations for multi-use paths are outside of the road road-right-of-way and therefore unable to use highway funds. The OCP was created to address this gap in available funding. The demand for this first round was significant with a roughly 3:1 request ratio to available funding. The OTC decision to allocate \$36 million of discretionary federal funding in the 2024-2027 STIP for OCP will further support communities as they work to increase the number of people walking and biking.

The table below indicates available funding for FY2021-24.

Funding Cycle	Transportation Alternatives (federally funded)	Multi-Modal Active Transportation (state funded)	Transportation Operating Fund (state funded)	AVAILABLE FUNDS
FY21-24	\$8,200,000	\$ 3,300,000	\$ 4,000,000	\$15,500,000

Application and Award Recommendation Process

Eligible applicants for OCP are local governments, school districts, tribal governments, mass transit or transportation districts, a special government body or other unit of local government, or a non-profit organization or other private entity with documented support from one of the governmental bodies along the regional path.

ODOT received 81 initial Letters of Interest in fourth quarter 2020, which resulted in 57 applications submitted by the February 1, 2021 deadline. ODOT staff reviewed project applications for eligibility and feasibility, and scored the projects on criteria developed and approved by the Oregon Bicycle Pedestrian Advisory Committee (OBPAC).

Staff presented funding scenarios and ranked project lists to OBPAC at their March 24, 2021 meeting. The lists included prioritized applications and a list of alternate projects in priority order to be considered if a project is withdrawn or if additional funding becomes available for the OCP program.

At the March 24 meeting, OBPAC unanimously voted to recommend a scenario which limits project refinement awards to \$1.5M to allow for more construction projects and supports funding projects ranked by staff scoring. The final recommendation includes funding four state funded and 13 federally funded projects. At the March meeting, OBPAC was informed that TOF funding for the program had become available pending approval from the state legislature. OBPAC supported the additional funds to be used for construction projects. The addition of \$4 million TOF funding will allow the award of four additional construction projects.

Oregon Transportation Commission

May 03, 2021

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Attachment 1 details, for the Commission's review, tables of the recommended and alternate projects for the Oregon Community Paths Program for FY 2021-24.

Attachments:

- Attachment 1 – *List of recommended and alternate OCP projects*

DATE: March 03, 2021

TO: Oregon Transportation Commission



FROM: Kristopher W. Strickler
Director

SUBJECT: *Agenda G – Update the Commission on the cost reduction efforts underway with the ADA Program*

Requested Action:

Receive an informational update on the Oregon Department of Transportation (ODOT) Americans with Disabilities Act (ADA) program curb ramp remediation progress, schedule, and current cost reduction efforts.

Background:

The primary purpose of the ADA program and ODOT's participation, is to ensure that ODOT programs are accessible and that pedestrians with disabilities have an equal opportunity to use the transportation system in an accessible and safe manner.

ODOT and the Association of Oregon Centers for Independent Living, et al. (AOCIL) entered into a 15-year settlement agreement (Agreement) on November 2, 2016, to make state highways more accessible to people with disabilities. The agreement will lead to major improvements to pedestrian accessibility along the highway system including installing missing curb ramps to connect parts of communities that have been difficult or unsafe to access because of an incomplete system and upgrade substandard existing curb ramps to improve mobility and safety along the highways for all users.

This presentation provides an ongoing update on our progress in meeting the expectations of the March 2017 ADA Accessibility settlement agreement, including program timeline, funding needs, and ongoing efforts to reduce costs and find program efficiencies. The requirements of the agreement established a total count of 27,327 curb ramps on ODOT's transportation system, of which, 25,899 of these were determined to be non-compliant. Milestone targets for the next 15 years are 7,770 ramps updated by 2022 (30%) and 19,424 ramps by 2027 (75%) and 25,899 (100%) by 2032. The program is at a critical point in replacing the almost 8,000 ramps required by next year; and is on track to meet the milestones specified in the settlement agreement.

Cost Reduction Actions

Since 2017 the ADA program has been working on meeting the requirements in the settlement agreement by setting up the program, ensuring construction compliance and developing projects to meet the 2022 milestone. ODOT is aware of the importance in reducing the overall cost of the

program and recognizes the impacts to other programs. ODOT has implemented and continues to do training for ODOT and contractors in design and construction to reduce the risk of reconstruction of the ramps that don't meet compliance. About 400 ramps a year are included in projects already in the STIP and are being replaced as part of the program. ODOT has identified three main areas of focus:

Ramp Design Changes: ODOT has made major changes to design and construction practices to ensure compliance with current ADA standards, and requirements of the settlement agreement. One of the cost increases in the program has been related to an increase in additional right of way. Initially the estimate of right of way was made at approximately 15%-20% of the ramps. This estimate was based on construction of pilot projects in 2018-2019 which demonstrated constructing ramps generally in existing right of way. However the group of projects in 2020-2021 had more unique challenges at individual ramp locations in design and temporary pedestrian access, which required additional right of way. Currently, approximately 50% of the ramps require some form of additional right of way, either permanent or temporary. This results in a substantial increase in dollars and time. The main focus of this effort is to reduce the overall footprint and minimize the need for additional right of way to construct the ramp. Currently ODOT is evaluating design practices and looking for opportunities to maintain compliance, while constructing ramps within our existing right of way. ODOT is engaging with internal staff and consultant partners (ACEC) to help identify process improvements and minimize scope creep in designs. Design guidance is being developed and will be distributed and available this April for projects in 2021-2022.

Reducing Construction Costs: As we reviewed the construction costs over the last year, it was apparent the contractors are adding in significant risk to their bid prices. In December of 2020 we engaged our contractors with a survey and followed up in January 2021, with individual workshops, with a select group of contractors. The purpose of the outreach was to identify areas of improvement, efficiencies and risk to help ODOT reduce our overall construction costs. Currently we are reviewing this data and developing an action plan for implementation of these contract changes. Many of these changes will be implemented on the majority of the 2021-2022 projects.

Contracting Efficiencies: Current efforts to meet the settlement agreement requirements of building and/or updating 7,770 curb ramps by the end of 2022 are utilizing existing STIP projects that trigger the ramp work and standalone ADA ramp projects. Some of the challenges with starting up the program were related to training and the learning curve required to produce compliant ramps with a high rate of success. This learning curve, along with a segmented funding stream have required high numbers of ramps to be constructed in 2020-2022. This compression of schedule has limited ODOT's ability to deviate from traditional contracting methods, due to the risk of production. The additional funding that was approved by the OTC last January provides funding certainty and the ability to look beyond the 2022 deadline. ODOT will be aggressively looking for opportunities to leverage existing STIP and local agency projects, starting in 2022 and 2023. The ADA program has only had opportunity to leverage a small number of local agency projects thus far, but feels there is potential for great savings to the program and will be moving forward with this strategy. ODOT is also developing the use of Design Build contracts for projects starting 2023 and will have the use of Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts starting in 2022. Both of these contracting methods should help bring innovation and efficiencies to this program by allowing design engineers and

contractors the ability to work more closely together to construct compliant and cost effective curb ramps. ODOT continues to provide opportunities for the use of small businesses by allowing for smaller project sizes, some of these projects are managed through our Maintenance District offices and the use of the Emerging Small Business program.

The next step will be to develop an action plan for cost reduction items in all three focus areas with an implementation schedule. Some of the items are already underway and as mentioned above will be implemented on the 2021 and 2022 projects. Additionally the ADA program is currently working with ODOT's Internal Audits Unit to evaluate the program and identify process improvement areas to enable the program to be more efficient and aid in the management of risk in the program. The ADA program will also continue collaborating with our accessibility consultant who is a national expert on ADA compliance and has been assisting ODOT in the development of the program. Lastly, ODOT is recommending engaging with the Continuous Improvement Advisory Committee (CIAC), to provide updates on program progress and cost reduction efforts.

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.

Attachments:

- Attachment 1 – *ADA Settlement Agreement*
- Attachment 2 – *2019 ODOT Annual Report*
- Attachment 3 – *2019 Accessibility Consultant Annual Report*



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: August 26, 2021

TO: Oregon Transportation Commission

Kristopher W. Strickler

FROM: Kristopher W. Strickler, Director

SUBJECT: **Consent 10** – *Annual STIP Adjustment*

Requested Action:

Approve the annual amendment to update the projects in the 2021-2024 Statewide Transportation Improvement Program (STIP).

Background:

In June 2019, the Oregon Transportation Commission (OTC) approved a major rebalance of the STIP to address the reprioritizing of projects and address positive and negative funding changes for the entire STIP. In July 2020, as part of the Commission's delegated approval update, the OTC approved new delegations on STIP revisions under \$5 million to the Director and the Division Administrator.

At the July 15, 2021 commission meeting, the OTC reviewed a new process to bring the majority of STIP amendments before the OTC for a yearly action to reduce the number of approvals throughout the year and provide the Commission a more comprehensive view of the changes made to the STIP.

Criteria for projects for the annual STIP adjustment are the following:

- New high priority projects (selected by their respective funding program), including amending a preliminary engineering phase into the STIP for construction in the 24-27 STIP.
- Modifications to existing STIP projects that advance program goals or Key Performance Measures, and selected as a priority by the funding program.

The targeted programs for the annual STIP adjustment are:

- Bridge Program
- Preservation Program (both Interstate Maintenance and Region paving)
- Culverts Program
- Roadside Safety Features
- Rail Program
- Active Transportation

To provide some details on this yearly amendment:

- 26 projects are being updated in the amendment;
- 13 projects are new priority projects for the various programs
- 2 projects are being cancelled

Oregon Transportation Commission

August 26, 2021

Page 2

Attachment 1 provides a list of added, deleted, and updated projects for the 21-24 STIP, which consists of the highest priority projects. These projects will be paid for with pre-determined funding reserves.

In accordance with the Governor's Executive Order on Climate (EO 20-04), the Climate Office performed analysis on the STIP adjustments, assessing changes in climate impacts. Several amendments shifted funds from bridge and culvert projects to paving projects, resulting in decreased climate adaptation and resilience benefits. STIP adjustments also resulted in Pedestrian and Bicycle Strategic funds moving up from the 2024-2027 STIP to be leveraged onto an existing project. This \$3.5 million increase benefits overall greenhouse gas (GHG) emission reductions and climate mitigation in the near-term. Advancing these funds may, however, decrease benefits during the 2024-2027 STIP cycle, if not replaced with other pedestrian and bicycle investments. More information on these results and the associated methodology can be found in Attachment 2.

Next Steps:

With approval, ODOT will add, update or delete the attached projects in the 2021-2024 STIP in a single batch.

Without approval, each project will be approved individually through the appropriate delegated process.

Attachments:

- Attachment 1- *2021 STIP Annual Amendment*
- Attachment 2- *Climate Analysis on STIP Annual Amendment*

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge # *DFI #	Phase	Primary Work Type	Attachment 4: Funding Responsibility	OTC Item - Rail Current Total (0 if new)	Crossing Safety Proposed Total	Upgrade to Key Difference	22440 Priority / Action Description
22485	1	OR281: Evans creek fish-passage improvements	17	17		OT	CULVERT	HB2017 Culvert	\$ -	\$ 308,000.00	\$ 308,000.00	New project. High priority.
22440	1	NW 112th Street and PNWR Rail Crossing Upgrades	7.6	7.6		PE, UR, OT	RAIL	SW RAIL	\$ -	\$ 1,235,000.00	\$ 1,235,000.00	New project. High priority.
	1	OR211 Road safety audit	14	24		PE	SAFETY	R1 Safety	\$ -	\$ 230,000.00	\$ 230,000.00	New project. High priority.
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	PE, CN	BR-RLR	FIX-IT SW BRIDGE	\$613,496.00	\$613,496.00	\$-	Change project timing to include adjacent high priority work.
20107	2	US101B: Lewis and Clark River Bridge (Warrenton)	4.70	4.86	00711	PE, CN	Bridge	FIX-IT SW BRIDGE	\$ 1,667,280.00	\$ 75,146.00	\$ (1,592,134.00)	Cancel project. Became lower priority.
20428	2	US20: Ellsworth Street (Willamette River) Bridge	10.34	10.55	01025D	CN	Bridge	FIX-IT SW BRIDGE	\$ 736,000.00	\$ 5,833,300.00	\$ 5,097,300.00	Add construction phase sooner than planned. High priority.
21224	2	US26: Little Humbug Creek Bridge	8.22	8.22	03099	PE, RW, UR, CN	Bridge	FIX-IT SW BRIDGE	\$ 684,000.00	\$ 4,275,200.00	\$ 3,591,200.00	Add final design and construction phases sooner than planned. High priority.
21223	2	OR202 Culvert MP 3.60	3.60	3.60		PE, RW, CN	Culvrt	FIX-IT SW FISH PASS	\$ 2,690,000.00	\$ 890,000.00	\$ (1,800,000.00)	Delay construction phase to include solution requested by ODFW/NMFS.
	2	OR34: Roadside Barrier Upgrades (MP 0.0 - 58.5)	0.00	58.50		PE, RW, CN	Safety	1R	\$ -	\$ 2,298,953.00	\$ 2,298,953.00	New project. High priority.
	2	I-5: Halsey to Lane County Line	203.55	216.14		PE	Presrv	FIX-IT SW IM	\$ -	\$ 3,512,000.00	\$ 3,512,000.00	New project. High priority.
	2	OR211: Meridian Rd MP 3.78 (Woodburn)	3.50	4.05		PE, RW, CN	Safety	FIX-IT REGION 2	\$ -	\$ 783,736.00	\$ 783,736.00	New project. High priority.
	2	OR58: Salt Creek tunnel to MP 70	56.18	70.00		PE, CN	Presrv	FIX-IT REGION 2	\$ -	\$ 15,659,631.00	\$ 15,659,631.00	New project. High priority.
	2	OR58: Eagle Creek to Salt Creek tunnel	48.40	56.10		PE	Presrv	FIX-IT REGION 2	\$ -	\$ 873,000.00	\$ 873,000.00	New project. High priority.

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge # *DFI #	Phase	Primary Work Type	Attachment 4: Funding Responsibility	OTC Item - Rail Current Total (0 if new)	Crossing Safety Proposed Total	Upgrade to Key Difference	22440 Priority / Action Description
	2	OR22: Westbound Marion Street Bridge (Salem)	25.63	26.15	07253B	PE, CN	Bridge	FIX-IT SW BRIDGE	\$ -	\$ 6,950,306.00	\$ 6,950,306.00	New project. High priority.
	2	OR6: Roadside Barrier Upgrades (MP 0.0 to 51.5)	0	51.5		PE, CN	Safety	1R	\$ -	\$ 10,890,272.00	\$ 10,890,272.00	New project. High priority.
	2	OR22: Culvert MP 7.70 & MP 7.76	7.7	7.7 - 7.76		PE	Culvrt	FIX-IT SW CULVERT	\$ -	\$ 400,000.00	\$ 400,000.00	New project. High priority.
21673	3	I-5: Azalea - Glendale (Southbound)	80.92	89.1	BR19313 BR19106 BR19312 BR19107	PE, CN	PRESRV	Fix-IT SW IM Fix-It SW Bridge	\$ 5,384,962.00	\$ 5,758,962.00	\$ 374,000.00	New, adjacent project added to existing project. High priority.
21653	4	US97: Earl St. - Colfax Ln. (Madras)	91.58	117.71	00971B	PE, RW, CN	PRESRV	Bike Ped Strategic	\$ -	\$ 3,487,299.00	\$ 3,487,299.00	Add bike/pedestrian facilities to existing project. High priority.
	4	US97: Dover Ln - Bear Dr Safety Improvements	97.5 97.87	100.5 98.37		PE	Safety	ARTS	\$ -	\$ 250,000.00	\$ 250,000.00	New project. High priority.
K20548	5	I-82 and I-84: Umatilla-Pendleton Concrete Pavement Repair	0.00 / 11.21	188.04 / 203.65	16437, 16438, 16439, 16440, 16441, 16442, 16452, 09578, 05209A	PE,CON	PRESRV & BRIDGE	Fix-it SW IM, Fix-it SW Bridge	\$ 10,091,999.00	\$ 13,141,999.00	\$ 3,050,000.00	New, adjacent project added to existing project. High priority.
K21754	5	I-84: Ladd Canyon - North Powder	276.8	285.33	0	PE, CON	PRESRV	FIX-IT SW IM	\$ 2,867,782.00	\$ 6,340,000.00	\$ 3,472,218.00	New, adjacent project added to existing project. High priority.
	5	I-84: Baldock Slough - Huntington Pavement Seal	297.1	345.77	0	PE, CON	PRESRV	FIX-IT SW IM	\$ -	\$ 3,717,000.00	\$ 3,717,000.00	New project. High priority.
	5	I-84: Tower Road - Stanfield	159.3	188.04	0	PE	PRESRV	FIX-IT SW IM	\$ -	\$ 700,000.00	\$ 700,000.00	New project. High priority.

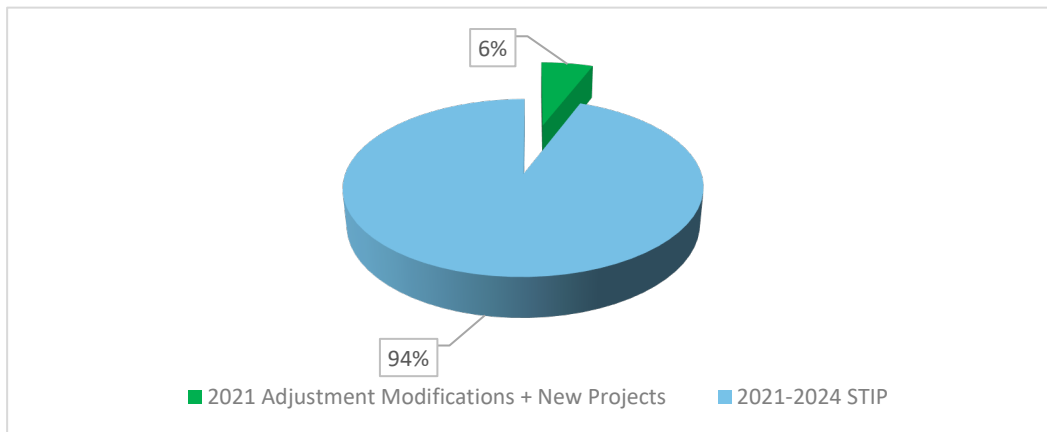
Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge # *DFI #	Phase	Primary Work Type	Attachment 4: OTC Item - Rail Funding Responsibility	Current Total (0 if new)	Crossing Safety Proposed Total	Upgrade fo Key Difference	22440 Priority / Action Description
22358	5	US20: Corridor Culvert Repairs Phase 2	108.7	257.65	0	PE, ROW, CON	Culvert Replacement	Culverts	\$ -	\$ 1,850,000.00	\$ 1,850,000.00	New project. High priority.
22383	5	OR86: Guardrail Upgrades Final Phase	34.06	70.75	0	PE, CON	Guardrail replacement	Guardrail Safety	\$ -	\$ 3,496,000.00	\$ 3,496,000.00	New project. High priority.
20497	5	US730: Juniper Canyon Creek Bridge	199	199.06	01630A	PE, CON	Bridge repair	Fix-it SW Bridge	\$ 1,330,550.00	\$ 191,745.00	\$ (1,138,805.00)	Cancel project. Became lower priority.

Applying Climate Lens to the 2021 Annual STIP Adjustment

The ODOT Climate Office reviewed the 26 proposed projects and funding change included in the 2021 STIP adjustment using the climate lens. This document provides high-level observations from that analysis. The annual adjustment contains amendments to existing projects and new projects that will be added to the 21-24 STIP.

Scope of Analysis

The analysis observations below are based on the climate office analysis of this limited subset of projects, not the full 2021-2024 STIP.



Process

The STIP adjustment contains a mix of amendments to existing projects in the 2021-2024 STIP and new projects that will be added once approved. Using 23 identified project attributes that tie to seven priority outcome areas (listed below), staff examined each project, isolated individual project attributes, and assigned a dollar value to each based on the portion of the total project each represents.

Several of the projects included multiple attributes. For example, a bridge project that adds capacity might be rated as positive for congestion relief while the new design standards also support Climate Adaptation/Resiliency outcomes, but the project also has new bike lanes and addresses a Safety issue. Each attribute is credited, proportional to the cost of that attribute, toward the associated outcomes. The priority outcome areas are:

- Climate—GHG Emissions Reduction/Mitigation
- Climate—Adaptation/Resilience
- Congestion Relief
- Social Equity
- Multimodal Mobility
- Safety
- State of Good Repair

Results: Key Climate Observations

The 2021 STIP adjustment will result in a net increase of \$68 million programmed project funding once approved. The rough return on investment calculation, based on investments and the projected outcomes and co-benefits anticipated, shows that these investments will generate \$90 million of benefits when we look at co-benefits across outcome areas.



Climate Adaptation/Resilience

Several project adjustments shifted funds from bridge/culvert project attributes to paving project attributes resulting in decreased Climate Adaptation/resilience benefits.

Of \$90 million in projected benefits, Climate Adaptation/Resilience will see 6% of these benefits.



Climate Greenhouse Gas Emissions Reduction/Mitigation

Adjustment contains Ped/Bike Strategic funds moved up from the 2024-2027 STIP, leveraged onto an existing 2021-2024 STIP project.

The \$3.5 million increased investment in pedestrian/bike will yield benefits for Climate GHG Emissions Reduction/Mitigation in the near-term. Advancing these funds may, however, decrease benefits during the 2024-2027 STIP cycle, if not replaced with other pedestrian/bike investments.

Of \$90 million in projected benefits, GHG Emissions Reduction/Mitigation will see 5% of these benefits.

Agenda Item No. 5.1

Ordinance No. 21-1467, For the Purpose of Amending the 2018 Regional Transportation Plan to Include the Preliminary Engineering Phase of the I-205 Toll Project, and to Clarify the Financial Connection of the I-205 Toll Project to the I-205 Improvement Project
Ordinances (First Reading and Public Hearing)

Metro Council Meeting
Thursday, November 04, 2021

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2018)	ORDINANCE NO. 21-1467
REGIONAL TRANSPORTATION PLAN TO)	
INCLUDE THE PRELIMINARY ENGINEERING)	Introduced by Chief Operating Officer
PHASE OF THE I-205 TOLL PROJECT, AND TO)	Marissa Madrigal in concurrence with
CLARIFY THE FINANCIAL CONNECTION OF)	Council President Lynn Peterson
THE I-205 TOLL PROJECT TO THE I-205)	
IMPROVEMENT PROJECT)	

WHEREAS, the Regional Transportation Plan (RTP) is the federally-recognized metropolitan transportation plan for the greater Portland region, and must be updated every five years; and

WHEREAS, the RTP fulfills statewide planning requirements to implement Statewide Planning Goal 12 (Transportation), as implemented through the Transportation Planning Rule and the Metropolitan Greenhouse Gas Reduction Targets Rule; and

WHEREAS, the RTP is a central tool for implementing the Region 2040 Growth Concept, and constitutes a policy component of the Regional Framework Plan; and

WHEREAS, the most recent update to the RTP was completed on December 6, 2018, following approval by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council; and

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

WHEREAS, amendments to the RTP must be reviewed for consistency with the priority outcomes, goals, objectives and policies in the RTP, including verification of fiscal constraint, consistent with the process and procedures defined in Chapter 8 of the RTP; and

WHEREAS, the public must be provided an opportunity to review and comment on proposed amendments to the RTP, consistent with the policies and procedures in Metro’s Public Engagement Guide; and

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, 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 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 regions 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, the 2018 RTP identifies congestion pricing as a high priority, high impact strategy to address congestion in ways that also advance achievement of the region's climate, equity, and safety goals; and

WHEREAS, the Metro Council and 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 Oregon Department of Transportation (ODOT) is studying options for a variable rate toll on all lanes of Interstate 205 (I-205) between Stafford Road and Oregon Route 213 (OR 213), known as the I-205 Toll Project, and the tolls would raise revenue to complete financing for the planned I-205 Improvement Project and manage congestion on this section of I-205; and

WHEREAS, ODOT is preparing to move the I-205 Toll Project forward in the National Environmental Policy Act (NEPA) review process and, as part of this process, requested an amendment to the 2018 RTP; and

WHEREAS, the requested RTP amendment would add a preliminary engineering phase for the I-205 Toll Project to the RTP financially constrained project list, and clarify the financial connection of the I-205 Toll Project to the I-205 Improvement Project in Chapter 8 of the RTP; and

WHEREAS, the ODOT I-205 Toll Project has been coordinated with other ODOT planning and project development efforts, including the Regional Mobility Pricing Project and the I-205 Improvements Project, and will continue to be coordinated in the future; and

WHEREAS, the planning work to date has been conducted with input from several state, regional and local committees, elected bodies and commissions, such as the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), the Oregon Transportation Commission, the Region 1 Area Commission on Transportation (RIACT), ODOT's Equitable Mobility Advisory Committee (EMAC), and County Coordinating Committees (staff and policymakers) in the greater Portland area; and

WHEREAS, Metro held a 45-day public comment period on the requested amendment from October 1 to November 15, 2021; and

WHEREAS, the Metro Council held a public hearing on November 4, 2021 to accept public testimony and comments regarding ODOT's requested RTP amendment; and

WHEREAS, approval of the requested amendment to the 2018 RTP will allow the I-205 Toll Project to continue to move forward in the NEPA review process and allows a separate amendment to the 2021-2024 Metropolitan Transportation Improvement Program (MTIP) to move forward for consideration by JPACT and the Metro Council to program funding for the preliminary engineering phase for the I-205 Toll Project, now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. The 2018 Regional Transportation Plan is hereby amended, as indicated in attached Exhibit A, attached and incorporated into this ordinance.

2. The "Summary of Comments Received and Recommended Actions," attached as Exhibit B, is incorporated by reference and any amendments reflected in the recommended actions are incorporated in Exhibit A.
3. The Findings of Fact and Conclusions of Law in Exhibit C, attached and incorporated into this ordinance, explain how this amendment complies with the Regional Framework Plan, statewide planning laws and the Oregon Transportation Plan and its applicable components.

ADOPTED by the Metro Council this ___ day of ____, 2022.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

STAFF REPORT

ORDINANCE NO. 21-1467 FOR THE PURPOSE OF AMENDING THE 2018 REGIONAL TRANSPORTATION PLAN TO INCLUDE THE PRELIMINARY ENGINEERING PHASE OF THE I-205 TOLL PROJECT, AND TO CLARIFY THE FINANCIAL CONNECTION OF THE I-205 TOLL PROJECT TO THE I-205 IMPROVEMENT PROJECT

Date: October 20, 2021

Department: Planning, Development & Research

Meeting Date: November 4, 2021

Prepared by: Kim Ellis,
kim.ellis@oregonmetro.gov

Presenter(s): Kim Ellis, RTP Project Manager; Mandy Putney, ODOT Urban Mobility Office Strategic Initiatives Director

Length: 25 minutes

ISSUE STATEMENT

The [Regional Transportation Plan](#) (RTP) is a state- and federally-required long-range transportation plan for the Portland metropolitan area. The RTP meets these federal and state requirements using an outcomes-based planning framework to guide planning and investment for all forms of travel – motor vehicle, transit, biking, and walking – and the movement of goods and freight. The plan was last updated in 2018; the next update is due by Dec. 6, 2023, when the current plan expires.

Amendments to the RTP are considered in between scheduled updates when a sponsoring agency requests changes to the funding, phasing, mode, function or general location of a project in the plan. The Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) jointly share responsibility for developing, adopting and amending the RTP to maintain compliance with federal and state requirements. As a land use action under the statewide land use planning program, the Metro Policy Advisory Committee (MPAC) serves in an advisory role to the Metro Council.

The purpose of this staff report is to introduce an amendment to the [2018 Regional Transportation Plan](#) (RTP) that has been requested by the Oregon Department of Transportation (ODOT). ODOT is studying options for a variable rate toll on all lanes of Interstate 205 (I-205) between Stafford Road and Oregon Route 213 (OR-213), known as the [I-205 Toll Project](#). Tolls would raise revenue to complete financing for the planned [I-205 Improvements Project](#) and manage congestion on this section of I-205. ODOT is preparing to move the I-205 Toll Project forward in the National Environmental Policy Act (NEPA) review process.

As part of this process, ODOT requested an amendment to the 2018 RTP. The requested amendment will:

- add the preliminary engineering phase for the [I-205 Toll Project](#) to the RTP financially constrained project list, and

- clarify the financial connection of the I-205 Toll Project to the I-205 Improvement Project in Chapter 8 of the RTP.

In summer 2020, ODOT launched an education and engagement period for the I-205 Toll Project to receive input on the draft purpose and need for the project, the toll alternatives to be studied, and key issues for analysis as required by NEPA. ODOT plans to continue public engagement on the I-205 Toll Project through 2022 (See the [I-205 Toll Project Public Involvement Plan](#)).

The requested amendment and supporting information submitted by ODOT are provided in **Attachment 1** and **Attachment 2**, respectively. The expectation is that amendments to the RTP follow the same adoption process as RTP updates. **Attachment 3** provides a more detailed schedule of the process and timeline for considering the requested RTP amendment and subsequent MTIP amendment. Key dates and milestones include:

- **Oct. 1 to Nov. 15, 2021** – A 45-day public comment period is underway. Comments may be submitted through an online comment form, email, mail and phone. The Metro Council will hold a public hearing on Nov. 4. Information is posted on Metro’s website: <https://www.oregonmetro.gov/news/public-notice-opportunity-comment-i-205-toll-project-amendment-regional-transportation-plan>
- **Fall 2021** – Metro staff will document and ODOT staff will respond to all substantive public comments received. This information will be provided to the Transportation Policy Advisory Committee on Transportation (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), JPACT and the Metro Council for discussion and consideration prior to requesting final recommendations and action.
- **Early 2022** – Request final action by JPACT and the Metro Council.

ACTION REQUESTED

No formal action is requested at this time. This is an opportunity for the Metro Council to ask questions and learn more about the requested RTP amendment from ODOT staff.

In addition, a hearing will be held to provide an opportunity for the public to provide feedback on the amendment as part of the 45-day public comment period that is underway, consistent with Metro’s Public Engagement Guide and RTP amendment procedures.

POLICY QUESTIONS FOR COUNCIL TO CONSIDER

1. Does Council have questions about the requested I-205 Toll Project amendment?
2. Does Council have questions about the timeline for consideration of the requested amendment?

STAFF RECOMMENDATIONS

None at this time, pending conclusion of the 45-day public comment period.

BACKGROUND

In 2018, JPACT and the Metro Council adopted a significant update to the RTP following three years of engagement that included more than 19,000 touch points with community members, community and business leaders, and local, regional and state jurisdictional partners. Through the extensive engagement that shaped the plan, Metro heard clear desires from community members for safe, smart, reliable and affordable transportation options for everyone and every type of trip.

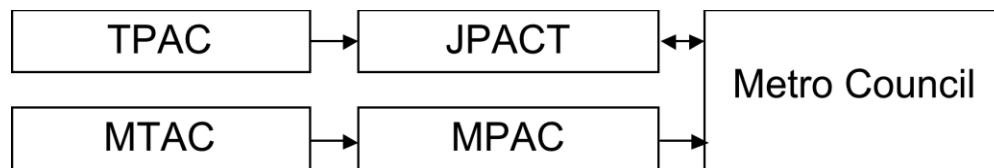
The 2018 RTP established a vision and regional transportation policy direction for planning and investment in the greater Portland transportation system. In addition to adequately maintaining the transportation system, investments aim to improve outcomes toward desired performance for the following priority policy outcomes:

- Equity
- Safety
- Climate
- Congestion relief

As the federally-designated metropolitan planning organization (MPO) for the Portland metropolitan area, Metro is responsible for developing and maintaining the RTP. As the regional government responsible for regional land use and transportation planning under state law, Metro is also responsible for developing and maintaining a regional transportation system plan (TSP), consistent with the Regional Framework Plan, statewide planning goals, the Oregon Transportation Planning Rule (TPR), the Metropolitan Greenhouse Gas (GHG) Reduction Rule, the Oregon Transportation Plan (OTP), and by extension the Oregon Highway Plan (OHP) and other state modal plans.

The Metro Council and JPACT jointly share responsibility for developing and adopting an updated RTP every five years to maintain compliance with federal and state requirements. As a land use action under the statewide land use planning program, the Metro Policy Advisory Committee (MPAC) serves in an advisory role to the Metro Council. The regional decision-making framework is shown in **Figure 1**.

Figure 1. Regional Transportation Plan (RTP) Decision-Making Framework



Amendments to the RTP are considered in between scheduled updates when a sponsoring agency requests changes to the funding, phasing, mode, function or general location of a project in the plan. There are several general sources for RTP amendment requests, including:

- (1) Oregon Department of Transportation (ODOT) requests that require an amendment to the RTP for specific projects or the phasing of existing projects due to a funding decision by the Oregon State Legislature or other action by the Oregon Transportation Commission;

- (2) city or county requests involving transportation projects in local transportation system plans (TSPs), area plans, concept plans or studies adopted through a public process;
- (3) transit agency requests to align transit plans or projects adopted through a public process and the Regional Transportation Plan; and
- (4) amendments resulting from a NEPA review process, corridor refinement planning as defined in the Oregon Transportation Planning Rule (TPR), or other studies that involve additions or deletions to the RTP financially constrained project list or a significant change in the mode, function or general location of a project on the RTP financially constrained project list.

The expectation is that amendments to the RTP follow the same adoption process as RTP updates. As described in [Chapter 8](#) (Section 8.4) of the RTP, such amendments require adoption by the JPACT and the Metro Council by Ordinance, accompanied by findings that demonstrate consistency with:

- regional priority policy outcomes, goals, objectives and policies;
- statewide planning goals;
- federal fiscal constraint requirements; and
- Metro’s adopted Public Engagement Guide and RTP amendment procedures.

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 Dec. 6, 2018.

ANTICIPATED EFFECTS

Approval of the RTP amendment will allow the I-205 Toll Project to continue to move forward in the NEPA review process that is underway. Projects and programs must be in the RTP’s financially constrained system in order to be eligible for federal and state funding, and to receive federal approvals during the NEPA review process. If approved, the 2018 RTP financially constrained project list amendment allows a separate amendment to the [2021-2024 Metropolitan Transportation Improvement Program](#) (MTIP) to move forward for consideration by JPACT and the Metro Council to program funding for the preliminary engineering phase for the I-205 Toll Project.

PACKET MATERIALS

- Is legislation required for Council action? **Yes**
- If yes, is draft legislation attached? **Yes**
- What other materials are you presenting today?
 - **Attachment 1.** Public Review Draft 2018 RTP Amendment
 - **Attachment 2.** I-205 Toll Project RTP Amendment supporting information submitted by ODOT
 - **Attachment 3.** Coordinated Timeline for Proposed I-205 Toll Project Amendments
 - Powerpoint presentation



Attachment 1. PUBLIC REVIEW DRAFT

2018 REGIONAL TRANSPORTATION PLAN (RTP) AMENDMENT

1. Amend 2018 RTP Chapter 8 (Table 8.3 and Section 8.1.3.8) to add the following information about the I-205 Toll Project as shown in ~~strikethrough~~ and underscore:

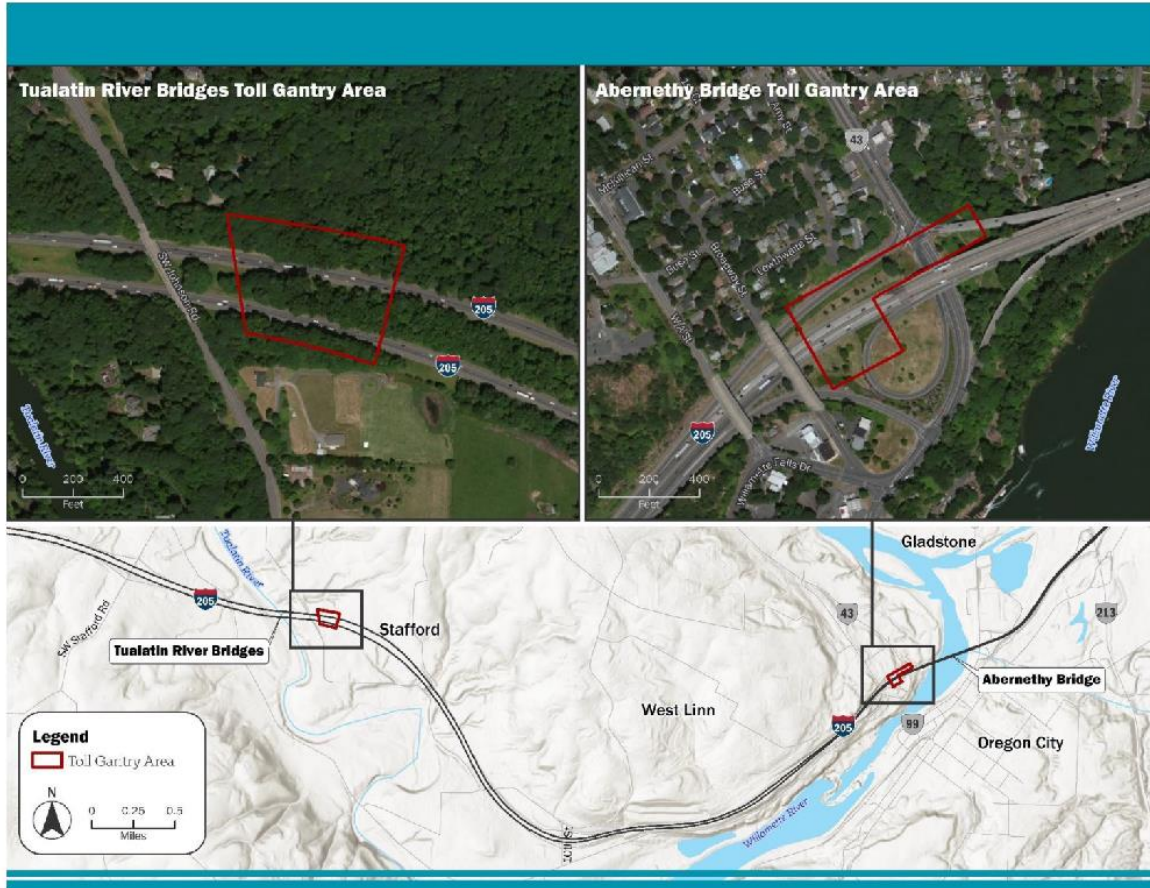
Table 8.3 Completed and Current Major Project Development

Project	Status
Interstate 5/Columbia River Crossing Project	LPA approved in July 2008. Record of decision signed by FHWA in December 2011. Project development work discontinued in 2013 in Washington and 2014 in Oregon. Joint Washington and Oregon Legislative Action Committee discussions begin in 2017.
Sunrise Project and Sunrise Jobs and Transportation Act Project	LPA approved in July 2009. Record of decision for Phase 1, Units 1, 2 and 3 signed by FHWA in February 2011. Phase 1 related projects were completed in June 2016. Environmental approval received for improvements on OR 224 at Rusk Road. Phase 2 and Phase 3 may require future NEPA reevaluation for improvements east of SE 122nd Ave, given changes in the built environment since 2010.
Division Transit Project	LPA approved in June 2017.
Southwest Corridor Project	LPA approved in Nov. 2018.
I-5 Rose Quarter Improvement Project	Environmental Assessment anticipated to be published in 2019. Design anticipated to begin in 2019.
MAX Red Line Improvements Project	LPA approval anticipated in January 2019. Documented Categorical Exclusion approval anticipated in 2019.
OR 217 Project	OR 217 Southbound: <ul style="list-style-type: none"> • Categorical Exclusion anticipated by October 2019. • OR 217 Northbound: Categorical Exclusion anticipated by April 2020.
I-205 South Corridor Widening and Seismic Improvements Project	Categorical Exclusion approved in December 2018. <u>Toll revenue will be needed to complete construction of this project. A separate Environmental Assessment for the I-205 Toll Project began in August 2020; expected completion in December 2022.</u>
Basalt Creek Parkway	IGA to plan for Basalt Creek signed by partners in 2011. Basalt Creek Transportation Refinement Study to define alignment completed in 2013 and adopted as an amendment to IGA. Categorical Exclusion anticipated in 2019.



Attachment 1. PUBLIC REVIEW DRAFT 2018 REGIONAL TRANSPORTATION PLAN (RTP) AMENDMENT

Figure 8.13b I-205 Toll Project Map



Source: ODOT



Attachment 1. PUBLIC REVIEW DRAFT
2018 REGIONAL TRANSPORTATION PLAN
(RTP) AMENDMENT

2. Amend 2018 RTP Appendix A to add I-205 Toll Project (Preliminary Engineering Phase) as follows:

RTP ID	Project Name	Start Location	End Location	Description	Estimated Cost (2016 dollars)	Time Period	Financially Constrained project list
<u>12099</u> <i>(new project)</i>	<u>I-205 Tolling Project (PE)</u>	<u>Oswego Hwy (OR 43) Interchange</u>	<u>Stafford Rd Interchange</u>	<u>The Project would toll all lanes of I-205 on or near the Abernethy Bridge and Tualatin River Bridge. The Project's purpose is to raise revenue to fund construction of the I-205 Improvements Project and manage congestion between Stafford Road and Oregon Route 213 (OR 213).</u>	<u>\$23,534,759</u>	<u>2018-2027</u>	<u>Yes</u>

I-205 Toll Project

Regional Transportation Plan Amendment

September 22, 2021



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I-205 Toll Project Public Involvement Plan

I-205 Toll Project Equitable Engagement Plan

Agencies and Stakeholders Involved in the I-205 Toll Project

Oregon Transportation Commission Meeting Minutes

2018 RTP Public Engagement and Non-Discrimination Checklist

1 Background

- ☒ A short history about why/how the project emerged and its importance to the region.
- ☒ A brief history of past actions and work that has been accomplished that has led to the proposed amendment (purpose and need description).

In 2017, the Oregon Legislature authorized substantial funding to improve highways, transit, biking and walking facilities, and use technology to make the state's transportation system work better through Oregon House Bill 2017 (HB 2017). As part of this comprehensive transportation package, the legislature also directed the Oregon Transportation Commission (Oregon Transportation Commission) to seek federal approval to implement value pricing (also referred to as tolling or congestion pricing) on I-5 and I-205 in the Portland metropolitan area to address congestion.

The Oregon Department of Transportation (ODOT) initiated the Portland Metro Area Value Pricing Feasibility Analysis shortly after the passage of HB 2017 to:

- Explore the options available.
- Determine how and where value pricing could help improve congestion on I-5 or I-205 during peak travel times.
- Begin to understand potential benefits and impacts to travelers and adjacent communities.

ODOT convened a Policy Advisory Committee for the Value Pricing Feasibility Analysis, which met from late 2017 through mid-2018. The Policy Advisory Committee developed [a recommendation to support the Oregon Transportation Commission's](#) efforts to implement Section 120 of HB 2017, which directs it to pursue approval from the Federal Highway Administration (FHWA) to implement congestion pricing on I-5 and I-205 in the analysis area.

In December 2018, ODOT submitted an [application to the FHWA](#). The application presented the Oregon Transportation Commission's application to implement freeway tolling projects, as directed in HB 2017, and sought a response from the FHWA providing confirmation and clarification of the following critical next steps:

- Eligibility and requirements under federal tolling programs
- Completeness of the proposed scope for additional analysis and project development
- FHWA ability to streamline required review under the National Environmental Policy Act (NEPA)

The projects identified in the application were selected through the Value Pricing Feasibility Analysis and reflect the majority recommendation of the Policy Advisory Committee. The recommendation for tolling on both I-5 and I-205 constitutes Oregon's proposed implementation of freeway tolling.

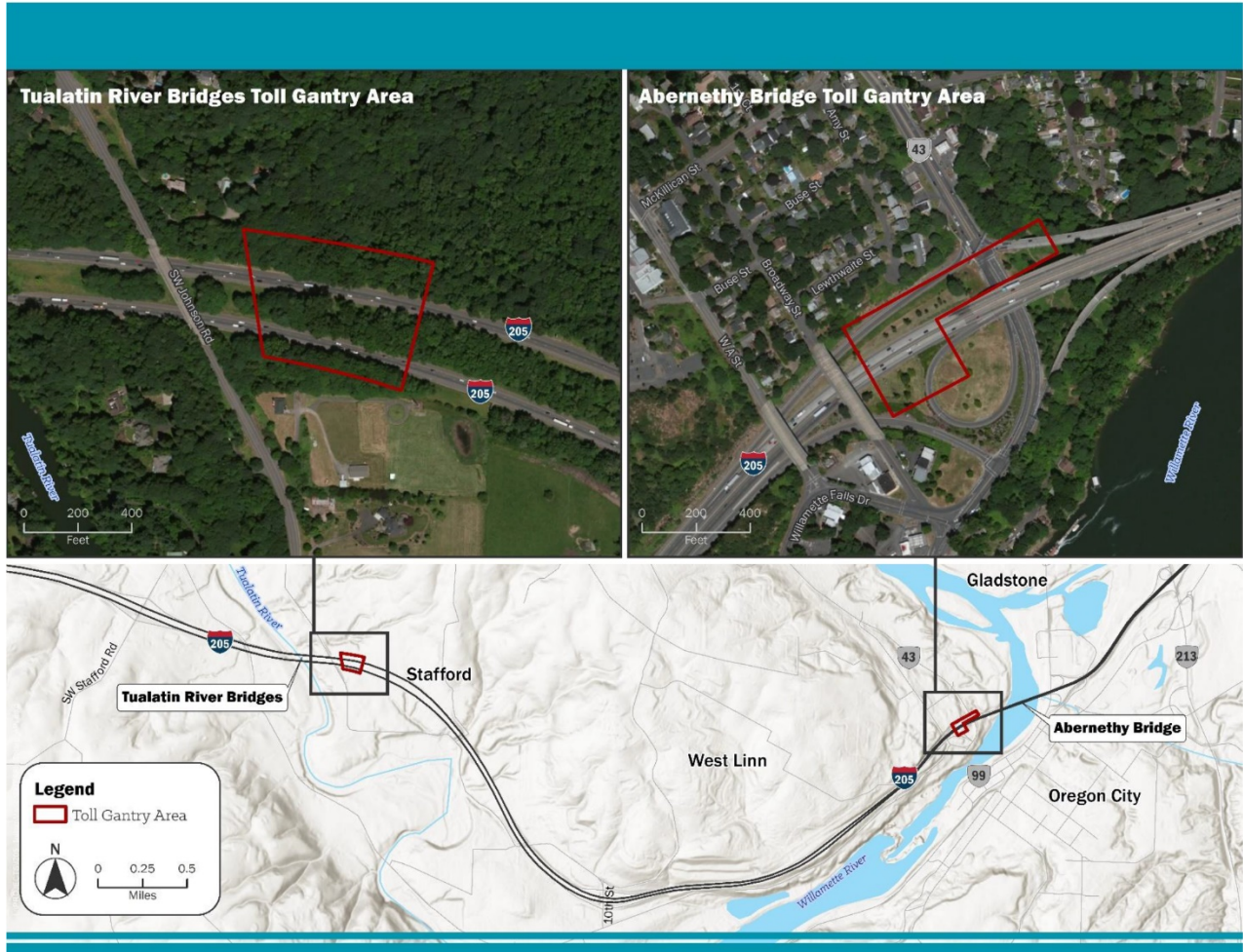
[FHWA responded to the application](#) in January 2019, which kicked off the next phase of analysis for the I-205 Toll Project.

In spring 2019, ODOT selected a consultant to begin planning for the environmental review phase for tolling in the I-5 and I-205 corridors. In fall/winter 2019/20 initial screening of five alternatives for the I-205 Toll Project was conducted to evaluate the performance of different toll configurations. A [summary of this analysis](#) is posted on ODOT's website.

In summer 2020, from August 3 to October 16, 2020, ODOT launched an education and engagement period specifically for the I-205 Toll Project. During this time, ODOT hosted numerous education and engagement activities to reach a broad audience. ODOT sought input at the beginning of the environmental review process to help refine the draft purpose and need for the Project, the toll alternatives to be studied, and key issues for analysis as required by NEPA. (See the I-205 Toll Project Public Involvement Plan attachment.)

In August 2021, following the legislative session in Oregon, ODOT determined that toll revenue was needed to complete construction of the [I-205 Improvements Project](#). The governor signed Oregon House Bill 3055 into law, which provides financing options that allow Phase 1A of the I-205 Improvements Project (reconstruction of Abernethy Bridge plus OR 43 and OR 99E interchanges) to be constructed beginning in spring/summer 2022. Toll funding will be needed to complete the remaining phases of the I-205 Improvements Project (Phase 1B (OR 99E to OR 213), Phase 1C (10th Street to Sunset Bridge), Phase 1D (OR 43 to 10th Street), and Phase 2 (10th Street to Stafford Road, including Tualatin River Bridges reconstruction); see Figure 1. Phase 1B is tentatively planned for construction in 2023. If tolling is approved upon completion of the environmental review process for the I-205 Toll Project, and pending development of a toll program, tolls could be used long term to pay back loans for Phase 1A and to pay for construction of the subsequent phases.

Figure 1. I-205 Toll Project – DRAFT MAP



- ☒ An overview of the primary purpose and secondary objectives for the project phase being amended into the RTP and its major work elements and milestones (e.g. complete NEPA and obtain the ROD, determine alternatives, selection of the agency preferred alternative, complete design and PS&E package, etc.)

The Oregon state legislature, region, and ODOT identified the I-205 Improvements Project as a priority project. The I-205 Improvements Project includes seismic bridge upgrades, adding the missing third lane north and south, and interchange improvements. The project received NEPA clearance in 2018; public engagement has been ongoing. In 2021, HB 3055 provided financing tools that allow construction on the first phase (Phase 1A) of the I-205 Improvements Project to begin in 2022, which includes replacement of the Abernethy Bridge and adjacent interchanges. Tolls are needed to fund subsequent phases of the I-205 Improvements Project, and pending completion of the Tolling Environmental Assessment, tolls would also be used as a payback option for funds borrowed for Phase 1A.

The purpose of the I-205 Toll Project is to use variable-rate tolls on the I-205 Tualatin River Bridges and Abernethy Bridge to raise revenue to complete the I-205 Improvements Project and manage congestion. The full text of the Purpose and Need Statement can be found [here](#).

Table 1 is a schedule of the major milestones for the I-205 Toll Project.

Table 1. I-205 Toll Project Major NEPA Milestones

Major NEPA Milestone	2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
NEPA Regional Transportation Modeling & DTA Subarea Modeling (2045 & 2027)		■	■	■				
Traffic Analysis (data collection, baseline, no-build and build)			■	■				
Environmental Assessment Tech Reports			■	■	■	■		
Draft Environmental Assessment			■	■	■	■		
Environmental Assessment Public Comment Period							■	
Environmental Assessment Comment Response Matrix							■	
Preferred Alternative Regional Modeling and Traffic Analysis (as							■	
Revised Transportation Tech Report							■	■
Prepare Final Environmental Assessment/FONSI							■	■
Final Environmental Assessment/FONSI								■

☒ Include a short description of any major project challenges expected to be addressed by the work elements and milestones.

There have been and will continue to be several challenges for the I-205 Toll Project. The project conducted an engagement evaluation survey following the summer 2020 engagement to learn how to improve. [A summary of findings is posted online.](#)

Some of the major challenges include:

- The ongoing COVID-19 pandemic – ODOT had to quickly adapt outreach and engagement from in-person to virtual. The tools continue to be refined to support engagement.
- This will be the first toll project in Oregon. There is a lack of understanding around modern/electronic tolling and the benefits of tolling.
- ODOT has formed an Equity and Mobility Advisory Committee and is the first toll program that is centering equity at this level during the planning and environmental review phase. This new approach reflects ODOT’s commitment to consider the following:
 - Persons experiencing low income who could be negatively affected financially
 - Availability of transportation options
 - Concern about diversion impacts to adjacent neighborhoods
 - Frustration that roads have already been paid for; lack of understanding about the current transportation funding environment
- Anticipated Timeline: 2020 – 2024. Initial I-205 Toll Project was identified at the end of the Value Pricing Feasibility Analysis in 2018. In summer 2020, the I-205 Toll Project officially initiated the NEPA process. The NEPA process is scheduled to be completed by quarter 4 of 2022. Starting in 2022 through 2024, ODOT will be developing toll technology and customer service back-office operations. During this time, the Oregon Transportation Commission will be undergoing a process to set toll rates. The earliest the I-205 Toll Project could begin to collect tolls would be in late 2024.

☒ A short description if there are other agencies or stakeholders involved in the project and their basic roles and responsibilities.

There are many agencies and stakeholders involved in the I-205 Toll Project. Below is a list of the agencies that were invited to formally participate in the environmental review process. Some agencies who declined participating agency status are involved in other ways on the I-205 Toll Project. Many stakeholders participate on the Equity and Mobility Advisory Committee, Regional Partner Agency Staff monthly meetings, Regional Modeling Group meetings, and the Transit and Multimodal Work Group meetings. The rosters of these groups are attached.

Federal regulations (23 USC 139) require that opportunities be provided for federal, state, and local agencies that have jurisdiction by law or a special interest in the project to formally participate in the project’s environmental review process. Three categories of agencies are involved:

- **Lead** – FHWA is the lead federal agency for NEPA compliance on the I-205 Toll Project. Serving as a joint lead agency with FHWA, ODOT will share in the responsibility to prepare the NEPA document.
- **Cooperating** – A cooperating agency is any federal agency, other than a lead agency, that has jurisdiction by law or special expertise with respect to any environmental impact involved in a proposed project or project alternative. No cooperating agencies have been identified for the I-205 Toll Project.
- **Participating** – Participating agencies that are not cooperating agencies are those having a specific interest in the I-205 Toll Project. Within this Coordination Plan, the term “participating agencies” includes Tribes with an interest in the I-205 Toll Project. These groups also to participate in the development of the Environmental Assessment.

Table 2. Lead Agencies

Agency	Responsibilities
Federal Highway Administration (FHWA)	<ul style="list-style-type: none"> • Manage 23 USC 139 process; prepare Environmental Assessment; provide opportunity for public, participating and cooperating agency involvement
Oregon Department of Transportation (ODOT)	<ul style="list-style-type: none"> • Manage 23 USC 139 process; prepare Environmental Assessment; provide opportunity for public, participating and cooperating agency involvement

Table 3. Agencies and Tribes Invited to be Participating Agencies

Agency	Responsibilities	Status
Federal		
National Marine Fisheries Service (NMFS)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: Water quality and species protected under the Endangered Species Act. 	No response
U.S. Environmental Protection Agency (US EPA)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: environmental or socioeconomic impacts. 	Declined
U.S. Fish and Wildlife Service (USFWS)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: water quality and species protected under the Endangered Species Act. 	No response
Tribes		
Confederated Tribes of the Grand Ronde Community of Oregon	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	Declined

Agency	Responsibilities	Status
Confederated Tribes of Siletz Indians	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response
Confederated Tribes of the Umatilla Indian Reservation	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response
Confederated Tribes of the Warm Springs Reservation of Oregon	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response
Confederated Tribes and Bands of the Yakama Nation	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response

Agency	Responsibilities	Status
Cowlitz Indian Tribe	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response
Nez Perce Tribe	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: archaeology, history, and tribal interests. 	No response
State		
Oregon Department of Environmental Quality (DEQ)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: environmental impacts. 	Accepted
Oregon Department of Fish and Wildlife (ODFW)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: water quality, fish and wildlife species. 	No response

Agency	Responsibilities	Status
Oregon Department of Land Conservation and Development (DLCDD)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: land use, statewide land use goals. 	No response
Oregon Department of Energy (ODOE)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: energy. 	No response
Oregon Department of State Lands (DSL)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: wetlands and waterways, state-owned lands. 	Declined
Oregon State Historic Preservation Office (SHPO)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: Historic Resources, Archaeological Resources, and Historic Preservation Act Section 106 compliance. 	Accepted

Agency	Responsibilities	Status
Oregon Tourism Commission (Travel Oregon)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: tourism economics. 	No response
Washington State Department of Transportation (WSDOT)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency: transportation and transportation planning. 	Accepted
Regional		
C-TRAN	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted
Metro	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted

Agency	Responsibilities	Status
Port of Portland	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted
Port of Vancouver	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted
Southwest Washington Regional Transportation Council (RTC)	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted
TriMet	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies for the following technical topics based on the special expertise or jurisdiction of the agency. 	Accepted
Local		
Clackamas County	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted

Agency	Responsibilities	Status
Clark County	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
Marion County	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
Multnomah County	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
Washington County	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Camas	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response

Agency	Responsibilities	Status
City of Canby	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Durham	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Gladstone	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Gresham	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Happy Valley	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted

Agency	Responsibilities	Status
City of Johnson City	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Lake Oswego	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of King City	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Maywood Park	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Milwaukie	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted

Agency	Responsibilities	Status
City of Oregon City	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Portland	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Rivergrove	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Sherwood	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of Tigard	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response

Agency	Responsibilities	Status
City of Tualatin	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Vancouver	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Washougal	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	No response
City of West Linn	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted
City of Wilsonville	<ul style="list-style-type: none"> Review Environmental Assessment for sufficiency and provide comments. Identify any issues of concern regarding the I-205 Toll Project’s potential environmental impacts and provide timely input on unresolved issues. Provide comments on the purpose and need; range of alternatives; and methodologies based on the special expertise or jurisdiction of the agency. 	Accepted

2 Regional Significance Determination

- The transportation project is located on a facility designated in one or more of the RTP network maps.

Within the 2018 RTP, I-205 is designated:

- Throughway on the regional motor vehicle network map (Figure 3.13)
- Frequent bus and future high-capacity transit on the regional transit network map (Figure 3.16)
- Main roadway route on the regional freight network map (Figure 3.21)

- The transportation investment requires permission or approval(s) from the U.S. Department of Transportation or project level NEPA review.

The I-205 Toll Project is currently in a project-level NEPA review, currently classified as an Environmental Assessment, which is anticipated to be completed in 2022.

- Other information for Metro staff to consider (please describe):

This is the first toll project in Oregon and will be foundational to providing a revenue stream to fund highway and multimodal congestion relief projects in the corridor, including funds toward the construction of the I-205 Implementation Project. Variable-rate tolls will help manage travel demand, resulting in reduced traffic congestion and benefiting those who pay the toll with a faster, more reliable trip.

FHWA has requested this RTP update, to clarify the financial connection between the I-205 Improvements Project and the I-205 Tolling Project. In addition, FHWA requires NEPA analysis to be completed under the preliminary engineering phase.

3 Regional Transportation Plan Consistency

- Identify the RTP Chapter 2 **regional goals and objectives** being addressed by this transportation investment – and provide a brief description of how.]

GOAL 1: Vibrant Communities

The greater Portland region is a great and affordable place to live, work and play where people can easily and safely reach jobs, schools, shopping, services, and recreational opportunities from their home by walking, biking, transit, shared trip or driving.

Objective 1.1 2040 Growth Concept Implementation – Focus growth and transportation investment in designated 2040 growth areas (the Portland central city, regional and town centers, corridors, main streets, and employment and industrial areas).

Objective 1.2 Walkable Communities – Increase the share of households in walkable, mixed-use areas served by current and planned frequent transit service.

Objective 1.3 Affordable Location-Efficient Housing Choices – Increase the number and diversity of regulated affordable housing units within walking distance of current and planned frequent transit service.

Objective 1.4 Access to Community Places¹ – Increase the number and variety of community places that households, especially households in historically marginalized communities, can reach within a reasonable travel time for all modes of travel.

Response:

The I-205 Toll Project performance measures will specifically measure access from households in our Equity Framework-identified communities, which includes and expands upon Metro’s equity definition of historically marginalized communities, to jobs, parks, and social resources (health services, community centers, grocery stores, schools, places of worship, etc.). The goal tied to these performance measures is to “provide benefits for historically and currently underserved communities.”

GOAL 2: Shared Prosperity

People have access to jobs, goods and services and businesses have access to workers, goods and markets in a diverse, inclusive, innovative, sustainable and strong economy that equitably benefits all the people and businesses of the greater Portland region.

Objective 2.1 Connected Region – Build an integrated system of throughways, arterial streets, freight routes and intermodal facilities, transit services and bicycle and pedestrian facilities, with efficient connections between modes that provide access to jobs, markets and community places within and beyond the region.

Objective 2.2 Access to Industry and Freight Intermodal Facilities – Increase access to industry and freight intermodal facilities by a reliable and seamless freight transportation system that includes air

cargo, pipeline, trucking, rail, and marine services to facilitate efficient and competitive shipping choices for goods movement in, to and from the region.

Objective 2.3 Access to Jobs and Talent – Attract new businesses and family-wage jobs and retain those that are already located in the region while increasing the number and variety of jobs that households can reach within a reasonable travel time.

Objective 2.4 Transportation and Housing Affordability – Reduce the share of income that households in the region spend on transportation to lower overall household spending on transportation and housing.

Response:

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals:

- Support safety, regardless of mode of transportation.
- Support multimodal transportation choices.
- Support interoperability with other toll systems.
- Support regional economic growth.

I-205 Toll Project performance measures go into greater detail about how the analysis on impacts to bicycle and transit is being done with a similar rigor to that for automobiles and freight movement. In coordination with Metro staff, we are developing a travel demand model that extends out of the Metro Urban Growth Boundary to understand impacts on areas within and beyond the region. Our performance measures also call out the specific regional and local impacts to movement of freight and commercial transportation.

GOAL 3: Transportation Choices

People throughout the region have safe, convenient, healthy and affordable options that connect them to jobs, school, services, and community places, support active living and reduce transportation-related pollution.

Objective 3.1 Travel Choices – Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce vehicle miles traveled.

Objective 3.2 Active Transportation System Completion – Complete all gaps in regional bicycle and pedestrian networks.

Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.

Objective 3.4 Access to Active Travel Options – Increase household and job access to planned regional bike and walk networks.

Response:

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals:

- Support safety, regardless of mode of transportation.
- Support multimodal transportation choices.

- Maximize interoperability with other transportation systems.

I-205 Toll Project performance measures go into greater detail about how the analysis on impacts to bicycle and transit is being done with a similar rigor to that for automobiles and freight movement.

Through the work of our Transit Multimodal Work Group, which comprises representatives from most of the region's transit providers, we have been discussing how the fare and technology system between tolling and transit can be integrated and seamlessly interoperable for the customer.

Through the work of our Equity and Mobility Advisory Committee, we have been providing research on how tolling has been coordinated with transit and multimodal transportation investments from around the United States and the world. Their work in communicating preferred policy and strategies for ODOT and the Oregon Transportation Commission will help inform and further the conversation for commitments to address transit and multimodal transportation needs in developing the I-205 Toll Project and the Oregon Toll Program, which has statewide impacts.

GOAL 4: Reliability and Efficiency

The transportation system is managed and optimized to ease congestion, and people and businesses are able to safely, reliably and efficiently reach their destinations by a variety of travel options.

Objective 4.1 Regional Mobility – Maintain reasonable person-trip and freight mobility and reliable travel times for all modes in the region's mobility corridors, consistent with the designated modal functions of each facility and planned transit service within the corridor.

Objective 4.2 Travel Management – Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Objective 4.3 Travel Information – Increase the number of travelers, households and businesses with access to real-time comprehensive, integrated, and universally accessible travel information.

Objective 4.4 Incident Management – Reduce incident clearance times on the region's transit, arterial and throughway networks through improved traffic incident detection and response.

Objective 4.5 Demand Management – Increase the number of households and businesses with access to outreach, education, incentives and other tools that increase shared trips and use of travel options.

Objective 4.6 Pricing – Expand the use of pricing strategies to manage vehicle congestion and encourage shared trips and use of transit.

Objective 4.7 Parking Management – Manage the supply and price of parking in order to increase shared trips and use of travel options and to support efficient use of urban land.

Response:

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals:

- Support safety, regardless of mode of transportation.

- Support multimodal transportation choices.
- Support interoperability with other toll systems.
- Support regional economic growth.

I-205 Toll Project performance measures go into greater detail about how the analysis on impacts to bicycle and transit is being done with a similar rigor to that for automobiles and freight movement. Person throughput in the corridor is a specific measure. ODOT is collaborating with Metro on the regional travel demand model, which includes all of the transportation and transit assumptions in the fiscally constrained Regional Transportation Plan project list, to inform the impacts analysis.

After the I-205 Toll Project completes the Environmental Assessment, a toll-rate setting process will begin. This process will identify the real-time data and decision-making process for future adjustments to the toll rate schedule. Based on the modeling data and feedback in the environmental review process, ODOT will propose a variable rate, and set the schedule for congestion pricing on the I-205 Toll Project that is intended to manage vehicle congestion, encourage shared trips, and increase transit use.

Through the work of our Transit Multimodal Work Group, which comprises representatives from most of the region's transit providers and Transportation Management Agencies, we have been discussing how to increase the number of households and businesses with access to outreach, education, incentives and other tools that increase shared trips and use of travel options.

GOAL 5: Safety and Security

People's lives are saved, crashes are avoided and people and goods are safe and secure when traveling in the region.

Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.

Objective 5.2 Transportation Security – Reduce the vulnerability of the public and critical passenger and freight transportation infrastructure to crime and terrorism.

Objective 5.3 Preparedness and Resiliency – Reduce the vulnerability of regional transportation infrastructure to natural disasters, climate change and hazardous incidents.

Response:

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals:

- Limit additional traffic diversion from tolls on I-205 to adjacent roads and neighborhoods.
- Support safety, regardless of mode of transportation.
- Contribute to regional improvements in air quality and support the State's climate-change efforts.
- Support multimodal transportation choices.

I-205 Toll Project performance measures go into greater detail about how we are measuring the impacts to safety for all modes of travel on the highway and roadways within the Area of Potential Impact. Additionally, through the review of performance measures with our Equity and Mobility Advisory Committee, we revised and updated our performance measures to understand impacts to neighborhood air quality, heat islands, and stress on the bike/walk system (e.g., using Level of Traffic Stress as a measure).

As the I-205 Toll Project is needed to fully deliver the I-205 Improvements Project, the seismic upgrade of the Abernathy Bridge and Tualatin River Bridges will provide an essential enhancement to the region's and state's infrastructure. This route is on crucial freight and emergency response route.

Additional bridges will either be upgraded or replaced to accommodate widening and withstand a major earthquake at the following locations over I-205:

- West A Street
- Sunset Avenue
- Tualatin River
- Borland Road
- Woodbine Road
- Main Street
- 10th Street
- Blankenship Road

GOAL 6: Healthy Environment

The greater Portland region's biological, water, historic and cultural resources are protected and preserved.

Objective 6.1 Biological and Water Resources – Protect fish and wildlife habitat and water resources from the negative impacts of transportation.

Objective 6.2 Historic and Cultural Resources – Protect historic and cultural resources from the negative impacts of transportation.

Objective 6.3: Green Infrastructure – Integrate green infrastructure strategies in transportation planning and design to avoid, minimize and mitigate adverse environmental impacts.

Objective 6.4: Light Pollution – Minimize unnecessary light pollution to avoid harm to human health, farms and wildlife, increase safety and improve visibility of the night sky.

Objective 6.5: Habitat Connectivity – Improve wildlife and habitat connectivity in transportation planning and design to avoid, minimize and mitigate barriers resulting from new and existing transportation infrastructure.

Response

The I-205 Toll Project performance measures will measure and avoid, minimize, or mitigate barriers through design to biological, water, historic and cultural resources.

GOAL 7: Healthy People

People enjoy safe, comfortable and convenient travel options that support active living and increased physical activity, and transportation-related pollution that negatively impacts public health are minimized.

Objective 7.1 Active Living – Improve public health by providing safe, comfortable and convenient transportation options that support active living and physical activity to meet daily needs and access services.

Objective 7.2 Clean Air – Reduce transportation-related air pollutants, including criteria pollutants and air toxics emissions.

Objective 7.3 Other Pollution Impacts – Minimize air, water, noise, light and other transportation-related pollution health impacts.

Response

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals or objectives:

- Contribute to regional improvements in air quality and support the State’s climate-change efforts.
- Support equitable and reliable access to health promoting activities (e.g., parks, trails, recreation areas) and health care clinics and facilities.
- Support multimodal transportation choices.

I-205 Toll Project performance measures go into greater detail about how the analysis will help analyze impacts to air pollutants, emissions, and minimize impacts to air, water, and noise, so that we can avoid, minimize, or mitigate.

Through the review of performance measures with our Equity and Mobility Advisory Committee, we revised and updated our performance measures to understand impacts to neighborhood air quality, heat islands, and stress on the bike/walk system (e.g., using Level of Traffic Stress as a measure).

GOAL 8: Climate Leadership

The health and prosperity of people living in the greater Portland region are improved and the impacts of climate change are minimized as a result of reducing transportation-related greenhouse gas emissions.

Objective 8.1 Climate Smart Strategy Implementation – Implement policies, investments and actions identified in the adopted Climate Smart Strategy, including coordinating land use and transportation; making transit convenient, frequent, accessible and affordable; making biking and walking safe and convenient; and managing parking and travel demand.

Objective 8.2 Greenhouse Gas Emissions Reduction – Meet adopted targets for reducing transportation-related greenhouse gas emissions.

Objective 8.3 Vehicle Miles Traveled – Reduce vehicle miles traveled per capita.

Objective 8.4 Low and Zero Emissions Vehicles – Support state efforts to transition Oregon to cleaner, low carbon fuels and increase the adoption of more fuel-efficient vehicles and alternative fuel vehicles, including electric and hydrogen vehicles.

Objective 8.5 Energy Conservation - Reduce transportation-related consumption of energy and reliance on sources of energy derived from petroleum and gasoline.

Objective 8.6 Green Infrastructure – Promote green infrastructure that benefits both climate and other environmental objectives, including improved stormwater management and wildlife habitat.

Response

The I-205 Toll Project Purpose and Need Statement specifically identifies the following goals or objectives:

- Contribute to regional improvements in air quality and support the State’s climate-change efforts.
- Support management of congestion and travel demand.

I-205 Toll Project performance measures go into greater detail about how the analysis will help analyze and reduce impacts to energy use, vehicle miles traveled, and greenhouse gas emissions.

Additionally, the I-205 Toll Project performance measures go into greater detail about how the analysis on impacts to bicycle and transit is being done with a similar rigor to that for automobiles and freight movement.

Through the work of our Transit Multimodal Work Group, which comprises representatives from mostly all of the region’s transit providers, we have been discussing how the fare and technology system between tolling and transit can be integrated and seamlessly interoperable for the customer.

Through the work of our Equity and Mobility Advisory Committee, we have been providing research on how tolling has been coordinated with transit and multimodal transportation investments from around the United States and the world. Their work in communicating preferred policy and strategies for ODOT and the Oregon Transportation Commission will help inform and further the conversation for commitments to address transit and multimodal transportation needs in developing the I-205 Toll Project and the Oregon Toll Program, which has statewide impacts.

GOAL 9: Equitable Transportation

The transportation-related disparities and barriers experienced by historically marginalized communities, particularly communities of color, are eliminated.

Objective 9.1 Transportation Equity – Eliminate disparities related to access, safety, affordability and health outcomes experienced by people of color and other historically marginalized communities.

Objective 9.2 Barrier Free Transportation – Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other historically marginalized communities face to meeting their travel needs.

Response

The I-205 Toll Project Purpose and Need Statement specifically identifies the goal of provide benefits for historically and currently excluded and underserved communities. How this would be accomplished is further defined in the I-205 Toll Project objectives and performance measures for this goal, as well as the Oregon Toll Program’s Equity Framework. The Equity Framework is a document that was developed in coordination between ODOT and the Equity and Mobility Advisory Committee. Key elements of this document include the following:

- Articulation of a trauma-informed approach.
- A more iterative step-by-step process that is changing the way ODOT conducts the environmental review process.
- Definition for equity groups that goes beyond what is traditionally required by Environmental Justice analysis.
- Pushing ODOT to commit to actions that advance equity, not just mitigate impact.
- Recognizing ODOT’s historical and current role in furthering inequality.

Building upon the work of the Value Pricing Feasibility Analysis, the Oregon Transportation Commission has directed ODOT and the Equity and Mobility Advisory Committee to develop options that address equity in tolling by increased transit and transportation options, addressing impacts of diversion on neighborhood health and safety, and impacts to affordability. Additionally, through the Oregon Legislature, ODOT will be required to report back on an equitable, income-based toll rate by September 2022.

GOAL 10: Fiscal Stewardship.

Regional transportation planning and investment decisions provide the best return on public investments.

Objective 10.1 Infrastructure Condition – Plan, build and maintain regional transportation assets to maximize their useful life, minimize project construction and maintenance costs and eliminate maintenance backlogs.

Objective 10.2 Sustainable Funding – Develop new revenue sources to prepare for increased demand for travel on the transportation system as our region grows.

Response

The quality of our transportation infrastructure and availability of funds are not keeping pace with population and jobs growth in our region. The federal gas tax that funds transportation projects has not increased since 1993, and Oregon state transportation funds have been primarily dedicated to maintaining aging infrastructure. Allowing the system to continue on its

current trajectory will result in a severely diminished economy, reduce quality of life, and deepen current inequities.

ODOT's Urban Mobility Office is charged with advancing ODOT's mission to comprehensively address some of the region's most pressing transportation challenges, including equity, climate change, safety, congestion, and reliable funding. The Urban Mobility Office is working on a plan to manage congestion for decades to come through implementation of congestion pricing, targeted elimination of highway bottlenecks, and strategic multimodal investments across the transportation network, in close coordination with partner agency efforts. The Oregon Toll Program is foundational to delivering this strategy. Tolling can manage congestion through variable-rate tolls, while also providing revenue for strategic transportation improvements. Together, the investments and strategies will provide people with faster and more efficient travel using the transportation mode of their choice. The I-205 Toll Project is the first toll project in the metropolitan region and can be the beginning of the larger Oregon Toll Program implementation.

The I-205 Toll Project will implement tolls in the vicinity of the Abernethy Bridge and Tualatin River Bridges in Clackamas County to fund the I-205 Improvements Project. As considered, tolls would help fund construction of the planned I-205 Improvements Project while giving travelers a better and more reliable trip. The I-205 Toll Project will also fund equity and mobility strategies that contribute to a more equitable toll project. Toll collection can continue in perpetuity, after the debt commitment for construction of the I-205 Improvements Project is paid. This ongoing revenue source can continue to pay for transportation investments into the future.

GOAL 11: Transparency and Accountability

Regional transportation decisions are open and transparent and distribute the benefits and burdens of our investments in an equitable manner.

Objective 11.1 Meaningful Public and Stakeholder Engagement – Engage more and a wider diversity people in providing input at all levels of decision-making for developing and implementing the plan, particularly people of color, English language learners, people with low income and other historically marginalized communities.

Objective 11.2 Performance-Based Planning – Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.

Objective 11.3 Coordination and Cooperation – Improve coordination and cooperation among the owners and operators of the region's transportation system.

Response

ODOT is employing many strategies to ensure engagement and transparency around decisions and the decision-making process. All of the engagement plans provide the various strategies we are employing to communicate information. A summary of the early project engagement for the

Purpose and Need Statement, alternatives and goals and objectives can be found in the [I-205 Engagement Summary](#).

Additionally, the Equity and Mobility Advisory Committee developed [the Equity Framework that guides the entirety of this project, including the technical analysis and the public engagement strategies](#). [The goals of the toll projects' equity framework are to:](#)

- Gain better outcomes for communities who have been historically [and are currently underrepresented and underserved by transportation projects](#)
- Be [transparent, inclusive and intentional when engaging communities in solutions](#)

In addition, the I-205 Toll Project conducted an [initial demographic assessment](#), based on a review of US Census Bureau and American Community Survey data, for public engagement to identify people experiencing low income and other historically and currently excluded or underserved communities. The following findings and actions resulted from the demographic analysis:

- For the I-205 project area corridor, specifically, project engagement should focus on reaching seniors, people experiencing low income, and people with disabilities at the northern edge of the project area. Additionally, the I-205 project area corridors contain linguistically isolated households that speak Spanish and Asian languages, including Chinese.
- Maps for the demographic analysis were developed and provided to the Equity and Mobility Advisory Committee for their recommendation process.
- Early traffic results combined with census tract analysis of people experiencing low incomes has led to planning focused engagement in areas where traffic impacts could affect historically and currently excluded or underserved communities, particularly Canby and Gladstone. This work is ongoing.

A more rigorous demographic analysis at the census tract level is ongoing to support Environmental Assessment development.

Identify the RTP investment priorities being addressed by this transportation investment – improving safety, advancing equity, reducing greenhouse gas emissions and/or managing congestion – and provide a brief description of how.

THE CHALLENGE

Congestion in the Portland metropolitan area has steadily increased in the past decade, with regional growth trends showing that these increases are likely to be sustained and expanded for the foreseeable future. The impacts of the COVID-19 pandemic resulted in reduced traffic on the transportation system during the past year, but we are experiencing traffic levels return to near pre-pandemic levels on many regional roadways. May 2021 traffic volumes on the region's freeway network approached 92% of pre-pandemic levels.

Significant population and employment growth in the region are straining the region's roadways. The population growth trajectory in the Portland metropolitan area is anticipated to accelerate in the coming decades, with a 23% population growth from 2.5 million to over 3 million residents between 2018 and 2040, followed by a 43% increase to 3.5 million residents by 2060.¹ Job growth in greater Portland continues to outpace that of the United States average, with job growth in Portland occurring at an average annual rate of 2% in 2019, which was greater than the nationwide average of 1.6%.²

ODOT has observed severe congestion throughout the region's freeway network. In 2019, evening peak travel times on the most congested portions of I-5 and I-205 approached three times that of the "freeflow" duration without congestion. Sections of I-5 and I-205 with older designs, sudden lane reductions or on-ramps with significant demand have resulted in these segments operating as "bottlenecks," with average travel times falling below 75% of freeflow speed (45 miles per hour). While the daily economic impact of delayed vehicles on regional freeways in 2019 is \$1.2 million, congestion also spurs increased air pollution and collisions.

The quality of our transportation infrastructure and availability of funds are not keeping pace with population and jobs growth in our region. The federal gas tax that funds transportation projects has not increased since 1993, and Oregon state transportation funds have been primarily dedicated to maintaining aging infrastructure. Much of the region's infrastructure is at risk of failing in a significant earthquake and needs updating. Transportation emissions are Oregon's largest single source of greenhouse gas emissions, and our transportation system contributes to inequities experienced by historically and currently underrepresented and underserved communities.

Allowing the system to continue on its current trajectory will deepen current inequities, severely diminish the economy, reduce quality of life, and result in increased greenhouse gas emissions.

A region cannot build its way out of congestion. Countless locations across the world have tried and failed to do so. Oregon is rightly proud of our investments in multimodal infrastructure. We know that highways are only one part of a thriving transportation network.

OUR CHARGE

ODOT's Urban Mobility Office is charged with advancing ODOT's mission to comprehensively address some of the region's most pressing transportation challenges, including equity, climate change, safety, congestion, and reliable funding. The Urban Mobility Office is working on a plan to manage congestion for decades to come through implementation of congestion pricing,

¹ Census Reporter. 2018. Accessed June 17, 2021. <https://censusreporter.org/profiles/16000US4159000-portland-or/>.

² Portland Business Alliance. 2020. Value of Jobs State of the Economy. Accessed March 15, 2021. <https://portlandalliance.com/assets/pdfs/economic-reports/2020-VOJ-State-of-Economy-WEB.pdf>.

targeted elimination of highway bottlenecks, and strategic multimodal investments across the transportation network.

The Oregon Toll Program is foundational to delivering this strategy. Tolling can manage congestion through variable-rate tolls, while also providing revenue for strategic transportation improvements. Together, the investments and strategies will provide people with faster and more efficient travel using the transportation mode of their choice. The I-205 Toll Project is the first toll project in the metropolitan region and can be the beginning of the larger toll program implementation.

- **Advancing equity**

- Established Equity Framework and Equity and Mobility Advisory Committee, which deepens relationships and partnerships with historically and currently underrepresented and underserved communities.
- The Equity Framework is changing the way ODOT would normally do the environmental review process to one that is more transparent and iterative.
- The Equity Framework is pushing ODOT to commit to actions that advance equity, not just mitigate impact. For example, the I-205 Toll Project will evaluate strategic investments to advance equity for transit and multimodal transportation options, neighborhood health and safety, and affordability
- Tolling is one funding tool that can more accurately reflect the true cost of those contributing to peak-hour congestion and benefit low-income drivers who value a reliable trip and easier access to more jobs.
- Congestion pricing coupled with improvements around bottlenecks provides congestion relief that can improve air quality in communities adjacent to the highway, which are disproportionately historically marginalized or excluded communities.
- Through the Oregon Legislature, ODOT will be required to report back on an equitable, income-based toll rate by September 2022.

- **Improving safety**

- Through variable toll rates, better congestion management reduces the large speed differences in stop-and-go traffic that backs up at peak travel hours and leads to severe injury crashes or deaths.
- Evaluating strategic safety and health investments in areas affected by I-205 toll-based diversion as to determine what investments would advance equity through safety improvements.
- I-205 Improvements Project, which includes crucial seismic upgrades, is made possible with tolling.
- New roundabout with the I-205 Improvements Project will improve safety and operations for northbound travelers accessing I-205.

- Auxiliary lanes will be lengthened and improved to address substandard merging and reduce traffic weaving.
- **Climate**
 - Reduces greenhouse gas and vehicle miles traveled through mode shifts. Project evaluating expanded transportation options.
 - Reduces greenhouse gas emissions by managing congestion so that fewer hours are spent waiting in highway congestion.
 - Abernathy Bridge improvements will construct the first earthquake-ready interstate structure across the Willamette River and seismic upgrades will be done to eight other corridor bridges, with the I-205 Improvements Project.
- **Congestion**
 - Tolling can manage congestion through variable-rate tolls, while also providing revenue for strategic transportation improvements.
 - Supports improved travel time, reliability, and efficient movement of goods.
 - Supports movement of regional and statewide economic development by opening access to a wider range of jobs and improving predictability of travel times.
 - Evaluating strategic investments made to advance equity through safety improvements in areas affected by toll-based diversion.
 - I-205 Improvements Project, which includes crucial seismic upgrades, is made possible with tolling.

Describe how project is consistent with and supports implementation of RTP System and Regional Design policies (see [RTP Chapter 3, Section 3.2 through Section 3.11](#)).

3.2 OVERARCHING SYSTEM POLICIES

3.2.1 Safety and security policies

3.2.1.1 Regional Transportation Safety Strategy (2018)

3.2.1.2 Using the Safe System approach

3.2.1.3 Regional high injury corridors and intersections

3.2.1.4 Safety and security policies

Response

The I-205 Toll Project meets the safety strategy and safety and security policies in the following ways:

- The I-205 Toll Project is relying on the regional travel demand model and also more refined modeling with the Dynamic Traffic Analysis and Multi Criteria Evaluation tool to analyze traffic patterns.

- For roadway safety, the NEPA analysis will assess the change in roadway safety conditions (based on Highway Safety Manual Part C Methodology) as well as change in roadway queues that could affect safety
- For bicycle and pedestrian modes, safety will be qualitatively addressed based on changes in Level of Traffic Stress (LTS) for each mode based on ODOT's bicycle and pedestrian documented LTS calculation methodology
- Through variable toll rates, better congestion management reduces the large speed differences in stop-and-go traffic that backs up at peak travel hours and leads to severe injury crashes or deaths.
- Evaluating strategic safety and health investments in areas impacted by I-205 toll-based diversion as to determine what investments would advance equity through safety improvements.
- New roundabout with the I-205 Improvements Project will improve safety and operations for northbound travelers accessing I-205.
- Auxiliary lanes will be lengthened and improved to address substandard merging and reduce traffic weaving.

3.2.2 Transportation equity policies

3.2.2.1 Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion (2016)

3.2.2.2 Transportation equity and the Regional Transportation Plan

3.2.2.3 Regional Transportation Plan equity focus areas

3.1.2.4 Transportation equity policies (7 policies)

Response

ODOT's strategic plan and Urban Mobility Office implementation of the plan includes the charge to serve all Oregonians equitably. The voices of our community matter and influence the work we do. A focus on equity ensures that we look beyond merely improving the system to improving the quality of life of every Oregonian. This includes being mindful of the benefits and burdens created by our work and ensuring they are distributed equitably. The equity goal includes focusing on workforce diversity and opportunities for advancement, expanding economic opportunities for minority groups, climate-change equity, and creating more representative public engagement processes.

- **Advancing equity in the I-205 Toll Project**
 - Established Equity Framework and Equity and Mobility Advisory Committee, which deepens relationships and partnerships with historically and currently underrepresented and underserved communities.
 - The Equity Framework is changing the way ODOT would normally do the environmental review process to one that is more transparent and iterative.

- The Equity Framework is pushing ODOT to commit to actions that advance equity, not just mitigate impact. For example, the I-205 Toll Project will evaluate strategic investments to advance equity for transit and multimodal transportation options, neighborhood health and safety, and affordability
- Tolling is one funding tool that can more accurately reflect the true cost of those contributing to peak-hour congestion and benefit low-income drivers who value a reliable trip and easier access to more jobs.
- Congestion pricing coupled with improvements around bottlenecks provides congestion relief that can improve air quality in communities adjacent to the highway, which are disproportionately historically marginalized or excluded communities.
- Through the Oregon Legislature, ODOT will be required to report back on an equitable, income-based toll rate by September 2022.

The I-205 Toll Project conducted an [Initial demographic assessment](#), based on a review of U.S. Census Bureau and American Community Survey data, for public engagement to identify people experiencing low income and other historically and currently excluded or underserved communities. The following findings and actions resulted from the demographic analysis:

- For the I-205 project area corridor, specifically, project engagement should focus on reaching seniors, people experiencing low income, and people with disabilities at the northern edge of the project area. Additionally, the I-205 project area corridors contain linguistically isolated households that speak Spanish and Asian languages, including Chinese.
- Maps for the demographic analysis were developed and provided to the Equity and Mobility Advisory Committee for their recommendation process
- Early traffic results combined with census tract analysis of people experiencing low incomes has led to planning focused engagement in areas where traffic impacts could affect historically and currently excluded or underserved communities, particularly Canby and Gladstone. This work is ongoing.
- A more rigorous demographic analysis at the census tract level is ongoing to support Environmental Assessment development.

3.2.3 Climate leadership policies

3.2.3.1 Climate Smart Strategy (2014)

3.2.3.2 Climate Smart Strategy policies (9 policies – note Policy 4 safety and reliability and Policy 5 Managed system)

3.2.3.3 Climate Smart Strategy toolbox of potential actions (Appendix J)

3.2.3.4 Climate Smart Strategy monitoring

3.2.3.5 Transportation preparedness and resilience

Response

Greenhouse gas emissions from cars and trucks have been rising since 2013 and represented 39% of total statewide emissions in 2016 (Oregon Global Warming Commission 2018). Idling vehicles sitting in congested conditions contribute to these emissions. In March 2020, the governor signed an executive order to reduce greenhouse gas emissions 45% below 1990 levels by 2035 and 80% below 1990 levels by 2050.

The I-205 Toll Project is consistent with the RTP policies related to climate change because it will result in greenhouse gas reduction through reduced vehicle miles traveled resulting from mode shifts. The project is evaluating expanded transportation options. The project will also reduce greenhouse gas emissions by managing congestion so fewer hours are spent waiting in in highway congestion.

3.2.4 Emerging technology policies

3.2.4.1 Emerging Technology Strategy (2018)

3.2.4.2 Emerging technology principles

3.2.4.3 Emerging technology policies

Response

The I-205 Toll Project will be all electronic tolling. The full technology design has not been developed, but ODOT plans to utilize and leverage applicable emerging technology as design of the toll collection technology is developed.

3.3 REGIONAL DESIGN AND PLACEMAKING VISION AND POLICIES

3.3.1 Streets serve many functions

3.3.2 Regional design classifications

3.3.3 Designs for safe and healthy transportation for all ages and abilities

3.3.4 Designs for stormwater management and natural, historic and cultural resource protection

Response

The Oregon Toll Program is committed to minimizing burdens and maximizing benefits to communities historically and currently excluded or underserved by the transportation system. These communities include varying ages, abilities and other factors. To achieve equitable outcomes and an equitable process in the I-205 Toll Project, ODOT seeks to actively engage these communities. The Oregon Toll Program will consistently and intentionally inform, listen to, learn from, and empower these communities throughout the I-205 Toll Project's development, implementation, monitoring, and evaluation processes. The I-205 Toll Project is still in NEPA evaluation, and the input described above will inform the project design.

3.4 REGIONAL NETWORK VISIONS, CONCEPTS AND POLICIES

3.4.1 Regional mobility corridor concept

Response

The I-205 Toll Project will operate on the designated I-205 throughway, an element of the regional mobility corridor concept that “integrates throughways, high capacity transit, arterial streets, frequent bus routes, freight/passenger rail and bicycle parkways into subareas of the region that work together to provide for regional, statewide and interstate travel” (RTP, page 3-55). ODOT seeks to implement the I-205 Toll Project on one of the top reoccurring throughway bottlenecks in the region (2013 – 2015) (RTP, Figure 4.41) to help manage congestion in this area and raise revenue to construct the I-205 Improvements Project. The I-205 Toll Project will contribute to the purpose of the regional mobility corridor concept by easing congestion on this critical throughway to move people and goods more efficiently through the region. As the I-205 Toll Project is developed and evaluated, it is considering opportunities to support bicycling, walking and access to transit in the corridor.

3.5 REGIONAL MOTOR VEHICLE NETWORK VISION AND POLICIES

3.5.1 Regional motor vehicle network vision

3.5.2 Regional motor vehicle network concept

3.5.3 Regional motor vehicle network policies (Throughways)

3.5.4 Interim regional mobility policy

3.5.5 Congestion management process – (also called out 4th bullet – next section)

Response

The I-205 Toll Project is part of the comprehensive congestion management strategy that ODOT is implementing. The Urban Mobility Office was established to oversee, align, and implement ODOT’s core urban mobility projects to achieve regional congestion relief, mobility, and safety for all users of the highway and interstate system. In addition, the Urban Mobility Office is implementing the Oregon Toll Program that will contribute to regional congestion relief and secure sustainable funding to modernize, not just maintain, the transportation system.

In line with ODOT’s mission, the Urban Mobility Office envisions an Oregon where all people have access to the mode of transportation that works best for them. ODOT is committed to supporting and investing in projects that provide a modern transportation system for all users. This includes multimodal transportation investments like public transportation, bicycle and pedestrian facilities, and safety enhancements like seismic upgrades to bridges, bottleneck alleviation to reduce potential crashes, and more protected facilities for all users. This commitment comes in two forms: delivering projects and supporting partner projects.

The I-205 Toll Project will implement tolls in the vicinity of the Abernethy Bridge and Tualatin River Bridges in Clackamas County to fund the I-205 Improvements Project and manage congestion. The toll project is currently being evaluated for benefits and impacts. As considered, tolls would help fund construction of the planned I-205 Improvements Project while giving travelers a better and more reliable trip.

Managing congestion on throughways will contribute to overall motor vehicle network efficiencies in the region. Implementing the I-205 Toll Project on the segment of the I-205 throughway between Stafford Road and the OR 43 interchange, will ease congestion at this top reoccurring regional throughway bottleneck, by:

- Providing funds to construct the I-205 Improvements Project, which includes seismic upgrades to bridges and a third travel lane in each direction among other improvements, and
- Shifting some drivers to either change their time of travel to less congested times of day; to other modes of travel like bus, biking or walking; or to not make their trip at all.

The implementation of the I-205 Toll Project is in direct support of the following regional motor vehicle network policies:

- *Policy 1 – Preserve and maintain the region’s motor vehicle network system in a manner that improves safety, security and resiliency while minimizing life cycle cost and impact on the environment.* Tolls will allow ODOT to actively manage capacity on the segment of I-205 throughway to allow for continues travel. The easing of stop/start traffic will result in a safer travel environment and result in less rear-end crashes. Further, the I-205 Toll Project will implement tolls in the vicinity of the Abernethy Bridge and Tualatin River Bridges in Clackamas County to fund the I-205 Improvements Project, which includes seismic upgrades to the Abernethy Bridge and Tualatin River Bridges, and several other bridges in the project area, contributing to the region’s resiliency in the event of a large earthquake.
- *Policy 3 – Actively manage and optimize capacity on the region’s throughway network for longer, regional, statewide and interstate travel.* The I-205 Toll Project will actively manage and optimize capacity on this segment of the I-205 throughway.
- *Policy 5 - Strategically expand the region’s throughway network up to six travel lanes plus auxiliary lanes between interchanges to maintain mobility and accessibility and improve reliability for regional, statewide and interstate travel.* The I-205 Toll Project will implement tolls in the vicinity of the Abernethy Bridge and Tualatin River Bridges in Clackamas County to fund the I-205 Improvements Project, which includes a third travel lane in each direction between Stafford Road and the OR 43 interchange.
- *Policy 6 – In combination with increased transit service, consider use of congestion pricing to manage congestion and raise revenue when one or more lanes are being added to throughways.* The I-205 Toll Project will implement tolls (synonymous with the term congestion pricing in this case), in the vicinity of the Abernethy Bridge and Tualatin River Bridges in Clackamas County to fund the I-205 Improvements Project, which includes a third travel lane in each direction between Stafford Road and the OR 43 interchange. The I-205 Toll Project is considering and evaluating opportunities to support transit investments in the corridor.
- *Policy 10 – Address safety needs on the motor vehicle network through coordinated implementation of cost-effective crash reduction engineering measures, education, and*

enforcement. The I-205 Toll Project will reduce crashes through interchange improvements that reduce conflicts between drivers entering and exiting the through traffic.

3.6 REGIONAL TRANSIT NETWORK VISION AND POLICIES

3.6.1 Regional transit network vision

3.6.2 Regional transit network concept

3.6.3 Regional transit network functional classifications and map

3.6.4 Regional transit network policies (8 Policies)

Response

ODOT is working closely with local jurisdiction partners and transit providers to better understand how to support the transit policies.

3.7 REGIONAL FREIGHT NETWORK VISION AND POLICIES

3.7.1 Regional freight network concept facilities.

3.7.2 Regional freight network policies (7 Policies)

3.7.3 Regional freight network classifications and map

Response

The I-205 Toll Project is located in the Clackamas Industrial Area freight regional freight network.

Movement of people and goods is critical to support a growing economy. Freight tonnage in the Portland region is expected to double by 2040, with 75% of total freight tonnage moved by truck. I-205 is a designated north-south interstate freight route in a roadway network that links Canada, Mexico and major ports along the Pacific Ocean. Trucks represent 6% to 9% of total traffic on I-205.

Congestion on I-205 affects the ability to deliver goods on time, which results in increased costs and uncertainty for businesses. The cost of congestion on I-205 increased by 24% between 2015 and 2017, increasing to nearly half a million dollars each day in 2017 (ODOT 2018b). Increasing congestion and demand and for goods will result in more delay, costs, and uncertainty for all businesses that rely on I-205 for freight movement.

The I-205 Toll Project supports regional freight policies by improving travel reliability and reducing congestion. The I-205 Toll Project shows the potential to improve traffic conditions in the transportation system during peak hours. The project shows an overall vehicle-hours travelled reduction due to travel-time savings on the freeway.

The I-205 Toll is expected to reduce vehicle throughput on tolled segments of I-205 because of the toll diversion. Tolling causes some drivers to divert their trips to other routes (rerouting) or destinations, other modes (mode shift), or other times of day. Daily traffic volumes are reduced.

3.8 REGIONAL ACTIVE TRANSPORTATION NETWORK VISION

3.8.1 Regional active transportation network vision

Response

ODOT is working closely with local jurisdiction partners to better understand how to support the regional active transportation network vision.

3.9 REGIONAL BICYCLE NETWORK CONCEPT AND POLICIES

3.9.1 Regional bicycle network concept

3.9.2 Regional bicycle network policies (5 policies)

3.9.3 Regional bicycle network functional classifications and map

Response:

ODOT is working closely with local jurisdiction partners to better understand how to support the regional bicycle network concept and policies.

3.10 REGIONAL PEDESTRIAN NETWORK CONCEPT AND POLICIES

3.10.1 Regional pedestrian network concept

3.10.2 Regional pedestrian network policies

3.10.3 Regional pedestrian network classifications and map

Response

ODOT is working closely with local jurisdiction partners to better understand how to support the regional pedestrian network concept and policies.

3.11 TRANSPORTATION SYSTEM MANAGEMENT AND OPERATIONS VISION AND POLICIES

3.11.1 Transportation system management and operations concept

3.11.2 Transportation system management and operations policies (7 policies, #1 is about pricing)

Response:

The I-205 Toll Project will be the first pricing project in the Portland metropolitan area and will be the catalyst for developing a regional system of pricing. Congestion pricing is a strategy that supports the RTP's transportation system management and operations concept to:

- Improve safety and travel time reliability.
- Improve transit on-time arrival and speeds.
- Reduce travel delay.
- Decrease vehicle miles traveled and drive alone trips.
- Reduce fuel use and corresponding air pollution and greenhouse gas emissions.

The implementation of the I-205 Toll Project is in direct support of the following transportation system management and operations policies:

- *Policy 1 - Expand use of pricing strategies to manage travel demand on the transportation system in combination with adequate transit service options.* The I-205 Toll Project will be the first pricing project in the Portland metropolitan area and will be the catalyst for developing a regional system of pricing. ODOT is working closely with local jurisdiction partners and transit providers to better understand how to support the transit policies.
- *Policy 2 – Expand use of access management, advanced technologies and other tools to actively manage the transportation system.* The I-205 Toll Project will be the first congestion pricing project in the Portland metropolitan area and will be the catalyst for developing a regional system of pricing.

Describe how identification of the project followed the RTP congestion management process policies (See [RTP Chapter 3, Section 3.5.5](#)) by considering the transportation strategies as described in Section 3.5.5 and Metro Code section [3.08.220.A](#).

The RTP calls for implementing system and demand management strategies and other strategies prior to building new motor vehicle capacity, consistent with the federal Congestion Management Process, Oregon Transportation Plan policies (including Oregon Highway Plan Policy 1G), and Section 3.08.220 of the Regional Transportation Functional Plan. In some parts of the greater Portland region, the transportation system is generally complete, while in other parts of the region, especially those where new development is planned, significant amounts of infrastructure will be added. In both contexts, management strategies have great value. Where the system is already built out, such strategies may be the only ways to manage congestion and achieve other objectives. Where growth is occurring, system and demand management strategies can be integrated before and during development to efficiently balance capacity with demand.

4 Fiscal Constraint

- Provide estimated total project cost in 2016 dollars for each phase through construction, and anticipated cost and timing for each project phase.
- Identify source of cost estimate to identify the confidence level of project costs (select one of the following):

- **Conceptual estimate:** These cost estimates are used where a significant need has been identified but a detailed project scope has not been developed. These cost estimates have the potential to change significantly as the project scope becomes more defined.
- **Planning-level estimate:** These cost estimates are based on a generally defined scope. Cost estimates are usually based on limited field-work and general cost assumptions. No actual design work has been done prior to the development of these cost estimates. The cost estimate could still change significantly as design work begins, but the estimate is more reliable than the conceptual estimates. (e.g., comprehensive plan, TSP, Metro cost estimate worksheet, corridor plan).
- **Engineer's estimate:** These cost estimates are based on actual preliminary design work. If done for all facets of the project and there are no further additions to the project scope, these estimates should represent a fairly accurate cost for the project. (e.g. detailed planning report, preliminary engineering, final design, NEPA documentation, etc.)

Construction costs will be part of the statewide program development costs. The preliminary engineering phase will cost an estimated \$27,257,890 in 2021 dollars. Construction phase costs are unknown prior to preliminary engineering efforts, including NEPA, but would come from the statewide toll program, which is new revenue and therefore would not affect the fiscal constraint. The funding source for the preliminary engineering phase is additional federal money that was greater than anticipated and therefore new money that was not forecast by ODOT and not included in the RTP financial forecast.

- Describe and provide documentation of relevant funding sources to be considered and/or secured for the project or changes to existing RTP financially constrained revenue assumptions.

New funds that were not previously anticipated will be used for this project. ODOT had a federal funding assumption and the federal authorization was greater than anticipated. See the attached Oregon Transportation Commission meeting minutes.

5 Performance

- Describe how the project or program advances one or more of the RTP investment priorities – improving safety, advancing equity, reducing greenhouse gas emissions and/or managing congestion.

The I-205 Toll Project is currently in the environmental review phase. Performance measures for all four of the RTP investment priorities are included in the metrics that will be analyzed during the NEPA process. The following performance measures have been developed with input from regional and local partners, as well as the Toll Program’s Equity and Mobility Advisory Committee:

- **Improving Safety**
 - An assessment of the potential for additional diversion onto the surrounding street system, especially onto neighborhood streets designed for low speed, low volume conditions.
- **Advancing Equity**
 - Consideration of [equity and mobility strategies](#) to ensure people of all demographics receive travel benefits.
- **Reducing Greenhouse Gas Emissions**
 - An assessment of the potential to reduce greenhouse gas emissions in the corridor by reducing start/stop traffic.
 - Congestion pricing is widely viewed as one tool that can likely help Oregon meet statewide greenhouse reduction goals. House Bill 3055 amended ORS 383.001 to explicitly acknowledge Oregon’s congestion issue and the role tolling has in alleviating the issue and supporting climate goals: “Significant traffic congestion adversely impacts Oregon’s economy and the quality of life of Oregon’s communities. Where appropriate, variable-rate tolls should be applied to reduce traffic congestion and support the state’s greenhouse gas emissions reduction goals.”
- **Managing Congestion**
 - Inclusion of a variable-rate toll that is higher during peak hours.
 - An assessment of whether improved reliability on I-205 will make bus service on the highway a viable option to improve the currently limited public transportation options between West Linn, Oregon City and the I-5 corridor.
 - An evaluation of existing transit during peak periods to accommodate any shift in travel modes.

Describe how the project or program contributes one or more of the federal and/or regional performance targets (RTP Chapter 2) for the transportation system.

- **Affordability**
 - Working under the Equity Framework developed by the Oregon Toll Program's Equity and Mobility Advisory Committee, affordability is a key topic of interest. ODOT will prepare a report for the legislature in September 2022 on equitable income-based toll rates.
- **Safety**
 - A multimodal safety analysis will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.
- **Multimodal travel**
 - An assessment of multimodal travel changes will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.
 - A multi-agency transit and multimodal working group is meeting regularly to support project development.
- **Mode share and Regional non-drive alone modal targets**
 - A mode share assessment will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.
- **System completion (bicycle and pedestrian)**
 - Opportunities to complete bicycle and pedestrian facilities on or adjacent to impacted roadways will be explored as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.
- **Congestion and Regional mobility policy (volume/capacity ratio)**
 - Midday 1-hour peak target is 0.9 and the PM 2-hour peak target is 0.99. A volume to capacity analysis will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022; however, volume to capacity ratio is expected to be below the maximum targets as congestion along I-205 is managed.
- **Freight delay**
 - Delay for freight is expected to be reduced as congestion is managed.
 - An assessment of multimodal travel changes, including to truck freight, will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.

- **Clean air**
 - An assessment of air quality impacts and benefits will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.
- **Greenhouse gas emission reduction**
 - An assessment of greenhouse gas emissions will be conducted as part of the NEPA analysis and disclosed in the Environmental Assessment scheduled to be released summer 2022.

Describe whether this is a safety project, consistent with criteria used to determine eligibility for state and federal safety program funding (e.g. HSIP or ARTS). This element aims to identify projects with the primary purpose of addressing a documented safety problem at a documented high injury or high risk location with one or more proven safety countermeasure(s).¹

While ODOT anticipates this I-205 Toll Project to result in overall safer travel conditions, this project is not addressing a documented safety problem at a documented high injury or high risk location.

Provide links to reports or other documents that support the above descriptions.

- Equity and Mobility Advisory Committee:
<https://www.oregon.gov/odot/tolling/Pages/Advisory-Committee.aspx>
- Equity Framework:
[https://www.oregon.gov/odot/tolling/Documents/Toll Projects Equity Framework with AppendixA.pdf](https://www.oregon.gov/odot/tolling/Documents/Toll%20Projects%20Equity%20Framework%20with%20AppendixA.pdf)
- I-205 Toll project draft performance measures:
<https://www.oregon.gov/odot/tolling/Documents/I-205%20Toll%20Project%20DRAFT%20Evaluation%20Performance%20Measures.pdf>
- I-205 Toll Project Methodology Memos for all NEPA disciplines is within the project's resource library, here: <https://www.oregon.gov/odot/tolling/Pages/Library.aspx>

Submit RTP modeling details for projects that include bicycle infrastructure and/or roadway capacity, if needed.

ODOT is partnering with Metro to complete the modeling for the I-205 Toll Project. For the NEPA analysis, the “Build” alternative includes a toll on the Abernethy Bridge and Tualatin River Bridges and the construction of the I-205 Improvements Project (called the I-205 South

project and the I-205 Abernethy Bridge and I-205 Northbound and Southbound Widening projects in the 2018 RTP). Roadway capacity is added with the addition of the missing third lane between OR 213 and Stafford Rd.

Analysis was conducted on this alternative (referred to as Alternative 3) and is presented in the [I-205 Toll Project Final Comparison of Screening Alternatives Technical Report \(March 31, 2021\)](#) and [Final Addendum \(September 1, 2021\)](#). The following tables summarize a few select regional modeling findings:

Table 4. Change in Regional Daily Vehicle Miles Traveled (VMT) (2027)

Type of VMT	VMT Change
Freeway	-413,000
Non-Freeway	+179,000
Total	-234,000

Table 5. Change in Regional Daily Vehicle Hours Traveled (VHT) (2027)

Type of VHT	VHT Change
Freeway	-13,300
Non-Freeway	+8,900
Total	-4,400

Table 6. Change in I-205 Daily Vehicular Volumes (Relative to 2027 Baseline)

I-205 Segment	Volume Change
Stafford Road to 10th Street	-36%
10th Street to OR 43	-24%
OR 43 to OR 99E	-33%
OR 99E to OR 213	-19%

Table 7. Change in Daily Person Trips by Mode (2027)

Trip Type	Trips
Single-Occupancy Vehicle	-5,500
High-Occupancy Vehicle	+4,500
Transit	<+500
Active (Bicycle, Pedestrian)	+1,000

Table 8. Daily Percentage Change in Volume at Select I-205 Locations (2027)

I-205 Locations	Volume Change
I-205 between I-5 and Stafford Road	-20 to -30%
I-205 north of 82nd Drive Overcrossing	-5 to -10%

Submit GIS shapefile of project, following 2018 RTP GIS submission instructions.

Shapefile is included.

6 Public Engagement

Describe the transportation planning and decision-making process through which the project was identified, how interested/affected stakeholders² were meaningfully engaged, and the opportunities for public feedback that were available during the process.

Planning and environmental review for the I-205 Toll Project builds on direction from the Oregon Legislature and the results of a feasibility analysis. In 2017, Oregon House Bill 2017 (“Keep Oregon Moving”) was passed to improve area highways; enhance transit, biking, and walking facilities; and use technology to make the transportation system work better. As part of this comprehensive transportation package, the Oregon Transportation Commission was directed to study tolling on I-5 and I-205 in the Portland metropolitan area. In response, ODOT initiated the Portland Metro Area Value Pricing Feasibility Analysis (Value Pricing Feasibility Analysis) to explore toll options, determine how and where tolling could help improve congestion on I-5 or I-205 during peak travel times, and discuss potential benefits and impacts to travelers and adjacent communities. During this time period, the location for the I-205 Toll Project was identified as feasible and a priority for further study and analysis.

In summer 2020, from August 3 to October 16, 2020, ODOT launched an education and engagement period for the I-205 Toll Project. During this time, ODOT hosted numerous education and engagement activities to reach a broad audience. The agency sought input at the beginning of the environmental review process to help refine the draft purpose and need for the I-205 Toll Project, the toll alternatives to be studied, and key issues for analysis as required by NEPA. ODOT received more than 4,600 survey responses, letters, emails, voicemails, and comments at meetings and briefings between August 3 and October 16, 2020.

A few engagement activities occurred in July 2020 prior to the start of the formal comment period. At these presentations, participants were notified of the starting date for the formal comment period, and the launches of the online open house and online survey, which were August 3, 2020.

This engagement was an opportunity for agencies, community groups, corridor travelers, and the public to provide their input on the following:

- Draft Purpose and Need Statement, including I-205 Toll Project goals and objectives.
- Recommended alternatives as potential tolling strategies to study in depth.
- Concerns and potential impacts to consider during the environmental review.
- Strategies to make a toll system work for better for all travelers and local residents.

Because of the ongoing COVID-19 pandemic, all engagement activities were conducted virtually to maintain physical distancing and protect public health. The I-205 Toll Project team

actively sought out comments from local, regional, and regulatory agencies; residents and businesses that rely on or are located next to I-205; and members of communities who have been historically and currently excluded and underserved in planning processes and underserved by the transportation system.

Below is a summary of the engagement that informed the I-205 Toll Project (with links to relevant reports):

- **Decision-making process:**
 - The need for tolling for congestion management and revenue generation was identified as part of HB 2017 legislative process
 - Result of Value Pricing Feasibility Analysis: I-205 near the Abernethy Bridge was selected both by the Policy Advisory Committee and by the [Oregon Transportation Commission](#)
- **Value Pricing Feasibility Analysis Stakeholder engagement – 2017 to 2018**
 - Policy Advisory Committee
 - 50 Presentations/briefings to local governments and community organizations
 - Notification through news releases/newsletters, social media, digital advertising, media coverage
 - 8 open houses, two online open houses ([winter 2018](#) and [spring 2018](#))
 - 6 discussion groups with historically excluded communities
- **I-205 Toll Project stakeholder engagement – 2020 to present**
 - I-205 Toll Project Public Involvement Plan (attached)
 - I-205 Toll Project Equitable Engagement Plan (attached)
 - [Equity and Mobility Advisory Committee](#) (May 2020 to present) – [Charter is located here.](#)
 - Presentations/briefings to local governments and community organizations (summer 2020, late fall 2021, summer 2021)
 - Regular updates to partner agency staff at monthly or bi-monthly meetings
 - [Online open house](#) (also in [Spanish](#)) and [webinar series](#), summer 2020
 - Notification of comment period via Enewsletter, news release, print and digital advertising, social media, radio ad, media coverage (See [Chapter 4](#) and [Appendix B](#) of the engagement summary.)
 - Outreach to historically and currently excluded or underserved communities with flyers at gathering places and direct outreach via engagement liaisons in summer 2020 (See [Chapter 4](#) of engagement summary.)

- **Planned:** Outreach to historically and currently excluded or underserved communities, neighborhoods and business groups in fall 2021 on impact analysis (attached)
- **Value Pricing Feasibility Analysis Opportunities for feedback**
 - Public comment period at each Policy Advisory Committee meeting
 - [Winter 2018 survey on traffic problems and concerns.](#)
 - [Environmental justices survey and discussion groups](#)
 - [Spring 2018 survey on concepts and potential mitigation](#)
 - [Oregon Transportation Commission listening session in July 2018](#), which was summarized in the [summer 2018 report](#)
 - Comment form on website; project email and voice mail
- **[I-205 Toll Project opportunities for feedback](#)**
 - Public comment period or breakout group at each Equity and Mobility Advisory Committee meeting
 - Ongoing conversations with partner agencies on purpose and need, alternatives, technical analysis through formal meetings and briefings, including:
 - Monthly Regional Partner Agency Staff Meetings – senior staff from metro region and Southwest Washington
 - Region 1 Area on Transportation Commission, and now the Region 1 Area on Transportation Commission Toll Work Group
 - Regional Modeling Group – technical and policy staff from regional and Southwest Washington Agencies
 - Transit and Multimodal Working Group – transit staff from regional partner agencies and transit providers
 - [Summer 2020 survey in five languages](#) on project purpose and need; recommended alternatives
 - Comment form on website; project email and voice mail

Describe how feedback from the public was incorporated into the development of the project.

The public engagement from the Value Pricing Feasibility Analysis informed the approach taken for the I-205 Toll Project. The I-205 Toll Project has requested formal and informal comments from the public and stakeholders, including historically excluded populations, since February 2020.

Development of the I-205 Toll Project is ongoing; an Environmental Assessment is currently underway to evaluate the impacts of implementing a toll on I-205 at Abernethy Bridge and Tualatin River Bridges. There will be additional opportunities for the public to engage,

including a formal 45-day comment period after the Environmental Assessment publication in spring 2022. There are several ways feedback was included:

- Edits to the Purpose and Need Statement, goals and objectives to reflect stakeholder feedback with additional focus on the needs of historically excluded communities, diversion and climate change.
- The I-5 Toll Project was expanded to the Regional Mobility Pricing Project to reflect stakeholder desires for a regional project on larger sections of I-5 and I-205.
- Traffic analysis and intersection locations for further analysis reflect diversion concerns from local residents and partner agencies; this effort is continuing through 2021 as the Environmental Assessment is developed.
- ODOT added [performance measures](#) recommended by Equity and Mobility Advisory Committee and partner agencies to better quantify effects of the toll project to local community.

Describe what demographic assessment was done to identify communities of color, people with limited English proficiency, people with low income and other historically marginalized communities as stakeholders.

The I-205 Toll Project conducted an [Initial demographic assessment](#), based on a review of U.S. Census Bureau and American Community Survey data, for public engagement to identify people experiencing low income and other historically and currently excluded or underserved communities. The following findings and actions resulted from the demographic analysis:

- For the I-205 project area corridor, specifically, project engagement should focus on reaching seniors, people experiencing low income, and people with disabilities at the northern edge of the project area. Additionally, the I-205 project area corridors contain linguistically isolated households that speak Spanish and Asian languages, including Chinese.
- Maps for the demographic analysis were developed and provided to the Equity and Mobility Advisory Committee for their recommendation process
- Early traffic results combined with census tract analysis of people experiencing low incomes has led to planning focused engagement in areas where traffic impacts could affect historically and currently excluded or underserved communities, particularly Canby and Gladstone. This work is ongoing.

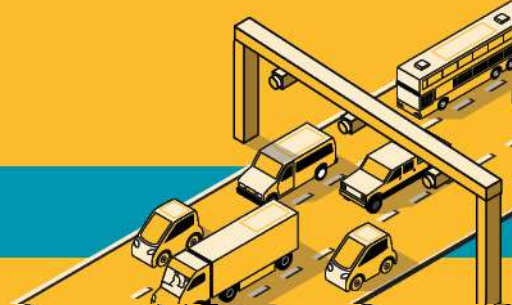
A more rigorous demographic analysis at the census tract level is ongoing to support Environmental Assessment development.

Submit the 2018 RTP Public Engagement and Non-Discrimination Checklist.

- See attached

I-205 Toll Project

Public Involvement Plan



Updated: April 23, 2021

PURPOSE

This plan will inform and guide the project team during the environmental review for the I-205 Toll Project (Project). It describes goals, objectives, performance measures, audiences, and tools to guide the public information and engagement activities that will be used to support ongoing project development and key decisions during the National Environmental Policy Act (NEPA) process. More detailed implementation plans will be written before each stage of the technical analysis to identify which tools will be used to ensure transparent delivery of information and public engagement that supports decision-making.

This plan seeks to apply the principles and approach detailed in the [Oregon Toll Program's Equity Framework](#). (See Attachment A.) The Oregon Toll Program has made the development of community mobility and equity strategies key components of successful toll projects. The Oregon Toll Program is committed to minimizing burdens and maximizing benefits to historically and currently excluded and underserved communities. The Oregon Toll Program will engage these communities so that it can intentionally inform, listen to, learn from, and empower them throughout the Project's development, implementation, monitoring, and evaluation processes.

Equitable engagement considerations and approach

Tolling improves travel reliability and provides revenue to finance improvements in the transportation system. However, tolling may result in greater impacts to historically and currently excluded and underserved communities due to the potential for disproportionately higher transportation costs, more limited transportation options in lower cost housing areas, limited schedule flexibility, and additional traffic rerouting through their neighborhoods by drivers attempting to avoid tolls. See Attachment B, I-205 Toll Project Equitable Engagement Plan, for a detailed approach to engage affected communities who have been historically and currently excluded and underserved.

OVERVIEW AND CONTEXT

Oregon House Bill 2017— "Keep Oregon Moving"—directed the Oregon Transportation Commission (OTC) to develop a proposal for value pricing (tolling) on I-5 and I-205 in the Portland metro area to reduce congestion and raise revenue for bottleneck improvements. The Portland Metro Area Value Pricing Feasibility Analysis concluded in late 2018 with an application to the Federal Highway Administration (FHWA) to proceed with tolling. FHWA responded with the steps necessary to proceed. The application describes the study areas on I-5 and I-205 and serves as a guide for two projects: I-205 Toll Project and I-5 and I-205 Regional

Toll Project. (Note: The environmental review and public input process for the I-5 and I-205 Regional Toll Project will occur in parallel with the I-205 Toll Project.)

In 2020, the ODOT Urban Mobility Office created the Comprehensive Congestion Management and Mobility Plan (CCMMP) to meet the direction of House Bill 2017. The CCMMP outlines priority projects that collectively improve urban mobility across the Portland metro area, with tolling as an essential funding strategy.

Projects in the CCMMP are underway and include:

- I-205 Improvements Project
- I-5 Rose Quarter Improvement Project
- Oregon Toll Program Implementation
- Interstate Bridge Replacement
- I-5 Boone Bridge Improvement Project

Description of the Project

ODOT is studying options with a variable rate toll on all lanes of I-205 between Stafford Road and OR 213. Tolls will raise revenue to complete financing for the planned I-205 Improvements Project and manage congestion. The I-205 Improvements Project includes seismic upgrades to the Abernethy Bridge and eight other bridges on I-205 and the extension of a third lane in each direction.

Tolls will be paired with strategies that:

- Help improve affordability of the transportation system.
- Identify opportunities and improve access to multi-modal options; including transit
- Address community health, including strategies to reduce negative effects to neighborhoods from changed traffic patterns, i.e. diversion.

Because the Project is the first toll project in the Portland metro area, some decisions and policies made through the development of this Project will also apply to future toll projects developed as part of the Oregon Toll Program.

Current status

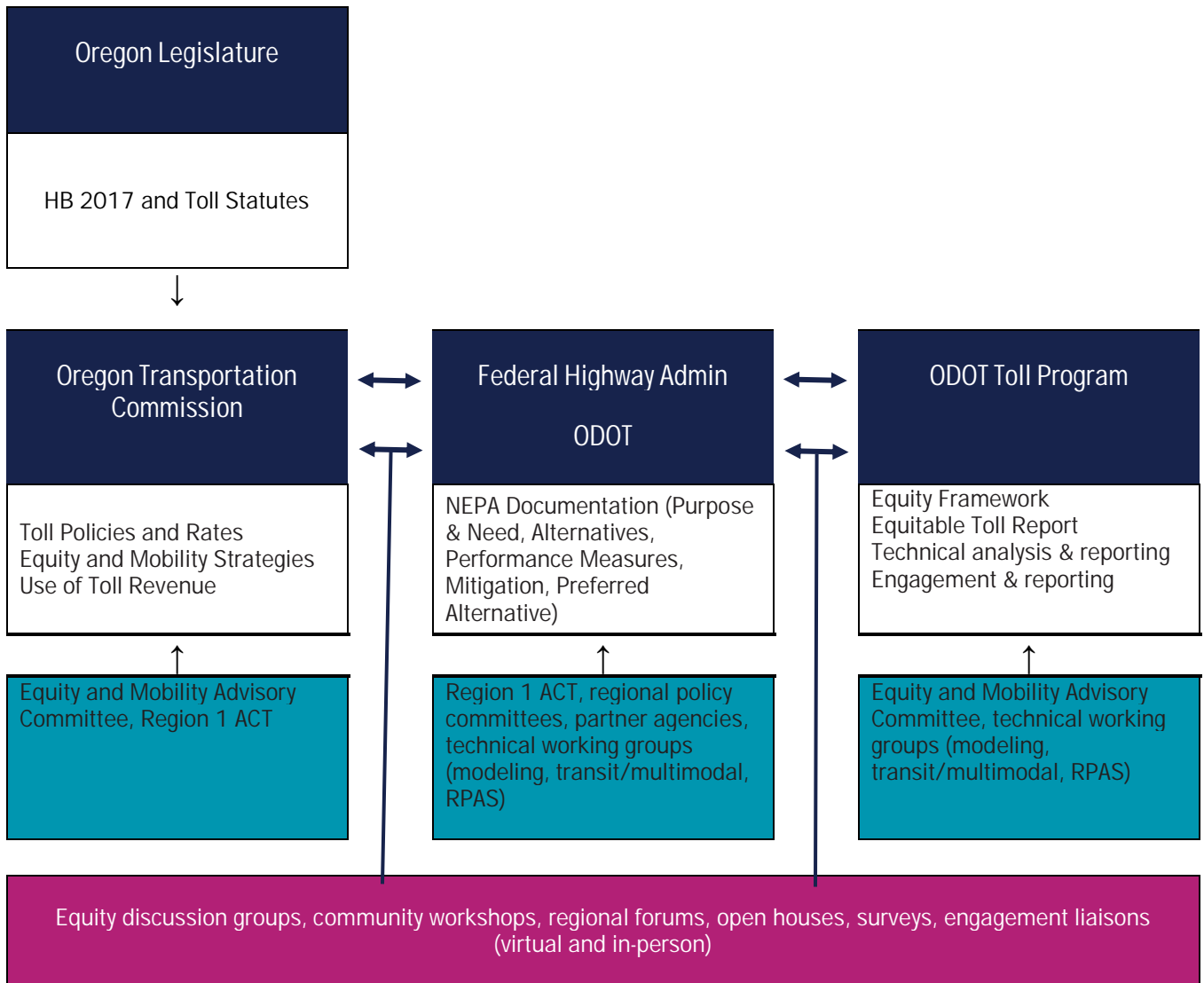
The Project is currently in the environmental review and public input phase to identify toll endpoints and equity and mobility strategies. Two alternatives, plus a “no build” alternative, are under review.

Tolling is not expected to be implemented in the Portland metro area before 2024. The OTC, as the toll authority, will establish toll rates after the conclusion of the environmental review and installation of toll equipment and collection systems.

I-205 TOLL PROJECT SCHEDULE

	2020	2021	2022	2023	2024
I-205 Improvements	Project design and bid		Construction (4 years) →		
I-205 Toll Project		Environmental review			★ Earliest tolls begin
Equity	Equitable engagement				

ADVISORY AND ENGAGEMENT STRUCTURE



Public engagement scope

Public engagement will inform key decisions and activities for the environmental review phase. Decisions related to the Project and toll policies are made at multiple places, as shown above.

The 15-member Equity and Mobility Advisory Committee convened for the Oregon Toll Program in mid-2020 provides an important forum for connecting to community members who understand the needs of those historically and currently excluded and underserved by transportation projects and are our ambassadors to their communities. In addition, ODOT will engage regularly with agency partners and regional policy committees to ensure community needs are considered.

Key Decisions	Primary Engagement Methods	Decision Maker
Equitable engagement plan and activities	<ul style="list-style-type: none"> Stakeholder interviews Community Based Organization interviews Equity and Mobility Advisory Committee Workshop with community engagement liaisons 	Toll Program
Equity framework	<ul style="list-style-type: none"> Equity and Mobility Advisory Committee Equity strategy group 	Toll Program
Evaluation criteria and performance measures for process equity	<ul style="list-style-type: none"> Equity and Mobility Advisory Committee 	ODOT. FHWA provides process oversight.
NEPA analysis: <ul style="list-style-type: none"> Statement of purpose and need, goals and objectives Range of alternatives Evaluation criteria and performance measures for analysis 	<ul style="list-style-type: none"> Regional policy committees (Region 1 ACT, JPACT) Direct engagement of partner agencies Technical working groups Online open houses/webinars Online survey Community engagement liaison outreach Equity and Mobility Advisory Committee 	ODOT; FHWA provides process oversight.
Toll policies and strategies related to mobility and equity	<ul style="list-style-type: none"> Equity discussion groups (in-person or online) Equity and Mobility Advisory Committee Technical working groups Regional policy committees (Region 1 ACT, JPACT, RTC) Online survey/webinars Community engagement liaison outreach 	OTC
Selection of equity and mobility strategies for preferred alternative	<ul style="list-style-type: none"> Technical working groups 	ODOT

Key Decisions	Primary Engagement Methods	Decision Maker
	<ul style="list-style-type: none"> Equity and Mobility Advisory Committee 	
NEPA analysis: <ul style="list-style-type: none"> Preferred alternative 	<ul style="list-style-type: none"> Regional policy committees (Region 1 ACT, JPACT) Direct engagement of partner agencies Technical working groups Website/info sharing Equity and Mobility Advisory Committee 	ODOT
Draft Environmental Assessment	<ul style="list-style-type: none"> Regional policy committees (Region 1 ACT, Metro) Open houses Online open houses/webinars Comment form Community engagement liaison outreach 	ODOT; FHWA provides process oversight
Refinement of preferred alternative to include community mobility and equity strategies and mitigation	<ul style="list-style-type: none"> Equity and Mobility Advisory Committee Technical working groups Direct engagement of partner agencies Community workshops 	ODOT
NEPA Decision		FHWA

Note: Toll Program refers to the project team for the toll projects. ODOT refers to the agency and includes staff outside the Toll Program.

STAKEHOLDER ASSESSMENT

Audiences and stakeholders

Primary audiences for engagement are those who are directly affected by the Project. They include:

Historically and currently excluded and underserved communities dependent on or affected by I-205: People experiencing low-incomes, youth, older adults, Black, Indigenous, multi-racial, and people of color, people who speak a language other than English, people living with disabilities, people who do not use or have access to traditional financial services (unbanked), and people who are experiencing houselessness, who may face challenges accessing employment and other services.

- Equity thought leaders; community-based organizations and faith-based organizations
- Community Engagement Liaisons
- Senior centers
- Transit providers
- Ride share services for people experiencing disabilities.

Local and state elected officials and agency staff in the Portland metro area, including Southwest Washington:

- Metro Regional Government, Southwest Washington Regional Transportation Council, four counties (Clackamas, Washington, Multnomah, Clark), City of Portland, City of Vancouver, cities/communities affected by congestion or rerouting from I-205 near Abernethy Bridge (Oregon City, West Linn, Tualatin, Lake Oswego, Canby, Gladstone, Milwaukie, Stafford and Wilsonville)
- Oregon and Washington state senators and representatives in the Portland metro area
- Transit providers (TriMet, SMART, C-TRAN, Clackamas CC)

Commuters/travelers through the I-205 corridor where tolls are being considered:

- People who use transit, bike, and walk in and through the corridor
- Multimodal transportation advocacy organizations
- Non-profits providing transportation, carpooling groups
- Transit providers
- I-205 corridor drivers from Oregon and Southwest Washington
- Transportation advocacy organizations, e.g AAA
- Ride sharing organizations

Communities along corridors where tolls are being considered and could benefit from, or be negatively affected by, the Project:

- Neighborhood associations, homeowner associations and residents at large
- School districts in the project area, PTA groups
- Health care agencies

Freight operators and businesses operating through and near potential tolled corridors:

- Freight shippers and businesses
- Small businesses - especially auto dependent (e.g. health care workers) and those along the corridor from both Oregon and Southwest Washington
- Non-emergency medical transportation providers
- Workforce development groups and the individuals they represent (e.g., trade schools, community colleges, students and administration).
- Business advocacy organizations (e.g. Chambers)
- Businesses outside of Portland metro area that depend on Portland mobility

Additional important stakeholders include:

- Advisory committee specifically provided a role in project development, including the Equity and Mobility Advisory Committee and Region 1 ACT
- Federal Highway Administration
- Tribal governments
- Regulatory agencies
- Environmental/climate organizations and advocates
- People interested in the project

Demographics overview

A review of the demographic data is intended to enhance the understanding of the diversity and broad engagement needs of the populations living in and traveling through the I-205 corridor. A demographic overview is presented in Attachment C.

Ethnicity and language needs – The I-205 corridor population is 78 percent white (about 1.5 mile radius around the roadway from the Columbia River to where it connects with I-5). In the I-205 corridor, approximately 13 percent of the population along I-205 identify as Hispanic or with Latin American roots and 9 percent of the population identify as Asian in the I-205 corridor. This is a higher proportion than the rest of the region.

Spanish is the most common language spoken at home besides English throughout the region and is spoken by about 5% of the regional population. Other spoken languages include Chinese, Vietnamese, Russian, , Japanese, and Arabic . The proportion of linguistically isolated households is slightly higher along the entirety of the I-205 corridor than the rest of the state/region.

Income –Slightly over one third of residents in the region earned \$50,000 per year or less. The 2013-2017 median income for households in the Portland metro area is about \$66,657. The Federal poverty level for 2017 was \$24,600 for a family of four. Higher median incomes are concentrated south and east of I-205 (Happy Valley and parts of West Linn).

Disability -- In the region, just over 10% of residents live with a disability. The most common types of disabilities along the highway corridors include ambulatory (5-6 percent), cognitive (5 percent) and independent living difficulties (4-5 percent).

Note: Demographic data is based on the U.S. Census prior to 2020. It is for informational purposes to guide engagement planning only. Additional analysis will be conducted as part of the environmental review process.

PUBLIC INVOLVEMENT PRINCIPLES, GOALS, OBJECTIVES AND PERFORMANCE MEASURES:

ODOT seeks to build trust in the community with the agency's planning and stewardship of the state's transportation system and its decision process. Trust is built by continually engaging a community and stakeholders throughout an entire phase, ensuring information is accessible to all and closing the loop by communicating to stakeholders how their feedback was incorporated in the project process. Consistent engagement coupled with a racial equity lens can help shape transportation policies, programs, and projects that better serve historically excluded and underserved populations.¹

¹ TransForm. (2019). Pricing Roads, Advancing Equity. Transform. Retrieved from: http://www.transformca.org/sites/default/files/Pricing_Roads_Advancing_Equity_Combined_FINAL_190314.pdf

Building trust requires time and repetition. Engagement efforts related to the Oregon Toll Program, in isolation, cannot achieve the goal of a trust relationship between ODOT and stakeholders. With active attention to the project's engagement goals, objectives and performance measures, progress will be made. By striving to achieve the principles, goals and objectives listed below, ODOT will work to achieve process equity, as defined in the Equity Framework, and enhance public trust in the agency's stewardship of the highway system and the decision process.

The following will apply:

Principles

The following six of the seven principles are taken from the Equity Framework relate to process equity and will guide implementation of all public engagement and communications for this phase:

- Incorporate a trauma-informed perspective in our current context by recognizing the trauma associated with multiple historic and current events, including the ongoing killings of African Americans by police, the COVID-19 pandemic, the economic ramifications from these events, as well as the impacts of past transportation and land use investments. While the future is uncertain, there is opportunity to demonstrate how ODOT can shift power to impacted community members to improve outcomes for all. Embracing this trauma-informed perspective in policy making can begin to address past harms, minimize burdens, and maximize benefits for historically and currently underserved community members.
- Begin with a racial analysis. By being explicit about race and systemic racism, the I-205 Toll Project can develop solutions that maximize benefits to all historically and currently excluded and underserved communities. By beginning with race, the Oregon Toll Program ensures that race will not be ignored or diminished as part of an overall analysis of equity in the system.
- Acknowledge historic context. Communities which have been historically affected by the transportation system should be explicitly acknowledged and involved in a direct and meaningful way in project development and follow-up.
- Prioritize input from impacted historically and currently excluded and underserved communities. The Oregon Toll Program is committed to identifying communities that have historically been excluded in transportation planning and who have been underserved or negatively impacted by prior transportation investments and plans, as well as those at highest risk of being negatively affected by the Project. ODOT commits to prioritizing the voices of impacted, excluded, and underserved communities and ensuring that their concerns, goals, and experiences shape the design of the Project. This focus will help produce greater overall benefits throughout the system.
- Attend to power dynamics among stakeholders. The Oregon Toll Program aims to elevate the needs and priorities of historically marginalized communities through this process. To do this requires that the Oregon Toll Program recognizes, understands, and shifts existing

power dynamics within ODOT, other government agencies, groups, the community, and the Project teams.

- Maintain a learning orientation. A focus on equity and implementing an all lanes toll application are innovative nationally and new for ODOT. The Oregon Toll Program commits to letting equity drive its approach to the planning process, including National Environmental Policy Act (NEPA) studies and community participation. The Oregon Toll Program commits to striving for continuous improvement and to creating space conducive for growth and collective learning.

The following additional communications priorities also apply:

- Be available: Be available and responsive to stakeholders to ensure they have timely information they need to provide informed input.
- Focus on the congestion problem: The mobility problems facing the region and the tools to address it must be a part of all communications with the public.
- Build on past work: Build on public input provided during earlier phases and communicate how it informs our current work.
- HB 2017: Fulfill requirements of HB 2017 from the state legislature.
- Meet ODOT standards: Apply ODOT's adopted communication standards to the Project which calls for being data driven, having goals focused on outcomes and using an ODOT voice. In addition, ODOT standards call for the creation of clear and accessible materials for middle school reading level, multiple languages and screen readers.

Goals, Objectives, Evaluation Criteria and Performance Measures

This section describes how the Toll Program will measure and evaluate progress toward process equity during the environmental review.²

Goal 1: Historically and currently excluded and underserved communities' concerns and aspirations are consistently understood and considered throughout the environmental planning process.

Objective 1.1:

Broadly and consistently share Toll Program vision, project purpose, benefits and impacts, and ways to participate with historically and currently excluded and underserved communities and corridor users to promote understanding and awareness.

Evaluation Criteria:

Availability of information about:

- Tolling and the rationale for tolling
- Program vision
- Project analysis and results

² These goals and objectives are specific to the Public Involvement Plan and consistent with the goals and objectives in the Purpose and Need Statement for the I-205 Toll Project.

- Engagement opportunities, including EMAC meetings
- Decision processes and decision-makers

Performance Measures:

- Opportunities to participate in project planning are publicized to potentially affected parties with at least 14 days advanced notice of comment period deadlines via print, digital and verbal channels, including social media, community liaisons and other trusted sources, Equity and Mobility Advisory Committee members, email, traditional media, and other channels.
- Equity and Mobility Advisory Committee meeting schedule, location and topics are distributed via the web, news release and email. Notices include the availability of public comment opportunity and the role of the Equity and Mobility Advisory Committee as an advisory body to the Toll Program and OTC.
- More than three ethnic media outlets publish balanced articles before each milestone.
- Project reach improves bi-annually as indicated by growth in email list, increased web visits, and reduction in bounce rate.

Evaluation Criteria:

Accessibility of information about:

- Tolling and the rationale for tolling
- Program vision
- Project analysis and results
- Engagement opportunities, including EMAC meetings
- Decision processes and decision-makers

Performance Measures:

- Information about project and engagement opportunities is delivered to potentially affected parties through trusted community sources (e.g. liaisons or Equity and Mobility Advisory Committee members)
- Key materials are developed to meet the region's information needs, language needs, Americans with Disabilities Act guidelines and an 8th grade literacy level.
 - Public materials clearly explain trade-offs, benefits and impacts of choices under consideration.
 - Public materials identify contact information, decision timelines, how decisions can be influenced and who will be making the decisions.
 - Public project materials are presented at an 8th grade reading level. For technical materials for which this is not feasible, summaries are prepared at an 8th grade reading level.
 - Public project materials are translated and co-created locally for the five languages most prevalent in the region. Translation services are available upon request for other languages.

- All public project materials are accessible for persons living with a disability consistent with Section 508 of the Americans with Disabilities Act (e.g. paper copies, closed captioning on videos, project documents are screen-reader friendly).
- People with specific questions about the project obtain responses within five business days from project staff in preferred language and format (e.g. telephone call).
- Greater than 50% of participants express satisfaction with the accessibility of information presented at public events, advisory committee meetings or online as measured by an evaluation survey.

Evaluation Criteria:

Level of understanding of project context and status

Performance Measures:

- Debrief discussions with community liaisons and Equity and Mobility Advisory Committee members within 30 days after engagement activities demonstrate that ODOT reached representatives from historically and currently excluded and underserved communities and they were able to understand the information.
- Greater than 50% of participants express satisfaction with the clarity, quality and relevance of information presented at events, meetings or online as measured by an evaluation survey.

Objective 1.2:

Meaningfully engage historically and currently excluded and underserved communities throughout the project or program design, development, implementation, monitoring, and evaluation processes.

Evaluation Criteria:

Ability of historically excluded and underserved communities to share their input in culturally-preferred ways.

Performance Measures:

- Engagement with community members use outreach tactics recommended by community-based organizations, Equity and Mobility Advisory Committee members, and community engagement liaisons.
- Qualitative assessment of Project staff resources shows priority of engaging historically and currently excluded and underserved communities.
- Community engagement liaisons and Equity and Mobility Advisory Committee members engage in regular conversations and outreach activities with their communities and provide this input to the toll project team.

Evaluation Criteria:

Participation levels demonstrate interest in project engagement activities

Performance Measures:

- Number of meeting participants, comments and questions tallied is similar or larger to previous phases
- Participants engage repeatedly over time as documented by sign-in sheets for committee meetings, discussion groups, community groups.
- Equity and Mobility Advisory Committee and community leaders report they shared information about project and engagement opportunities with networks at project milestones.

Evaluation Criteria:

Participant input reflects demographic and geographic diversity of people affected by project.

Performance Measures:

- Significant proportion of comments and outreach event attendees are representative of the population in the region and toll project corridor(s) and at least proportional representation from historically and currently excluded and underserved communities.
- Input obtained is representative of the population in the region and toll project corridor(s) and contains at least proportional representation from historically and currently excluded and underserved communities.
- Comments are received from affected corridor users living outside the Portland metro area.

Evaluation Criteria:

Participant satisfaction with engagement opportunities

Performance Measures:

- Over time, participants express satisfaction with their opportunity to be heard during engagement activities as measured by surveys or other methods conducted during or after engagement activities.
- Equity and Mobility Advisory Committee meeting evaluations reflect satisfaction with quality of facilitation and the committee's ability to incorporate needs of historically and currently excluded and underserved communities into project or program plans.

Goal 2: Historically and currently excluded and underserved communities view Toll Program Team as a transparent partner when planning the toll system.

Objective 2.1:

Regularly report how input from historically and currently excluded and underserved communities has been considered and incorporated into project development.

Evaluation Criteria:

Modifications are made to the project based on input from historically and currently excluded and underserved communities.

Performance Measures:

- Decision makers actively review, consider and discuss input from historically and currently excluded and underserved communities separate from the population at large.
- The project team can point to community priorities identified during outreach to historically and currently excluded and underserved communities and demonstrate that they are being considered and implemented in the toll program or project.

Evaluation Criteria:

Project decisions are clearly communicated directly to stakeholders and commenters.

Performance Measures:

- After decisions or changes in the toll program or project are made, the Toll Program proactively reaches out using a variety of communication channels and languages to inform stakeholders and commenters how their input was considered and influenced the decision or change, for example through community liaisons and e-news.
- Changes to the program or project are communicated via community/committee meetings, e-news, at workshops and public events.
- Input received from regular conversations with community liaisons and Equity and Mobility Advisory Committee members indicate historically and currently excluded and underserved communities understand how their input was used for decision-making.

Evaluation Criteria:

Project staff regularly communicates what has been heard and learned related to equity.

Performance Measures:

- Periodic project evaluations are published to show the toll program and project performance on integrating equity and principles detailed in the equity framework.

Goal 3: Regional agency partners and stakeholders collaborate with project staff in the development of the projects to create robust and supported project alternatives. Multiple jurisdictions oversee the comprehensive transportation system in the Portland metro area. A well-functioning system relies on effective coordination between entities that manage local roads, regional roads and highways, transit services, land use planning and transportation funding. An effective toll system will require travelers to have choices to use the toll road or other options that may be provided by another transportation authority.

Objective 3.1:

Create opportunities to collaborate with regional agency partners throughout project development to incorporate community values and concerns.

Performance Measures:

- Regular attendance and active engagement from partner agencies and stakeholders at and between technical working group meetings.
- Agency partner staff review, discuss and share input before moving ahead to next step in environmental review process.
- Regional partners provide opportunities for project briefings to facilitate dialog and partner input before key decision milestones.
- Regional partners distribute project information through their networks at key milestones.
- Project staff regularly report back on how partner input was considered and how/if used.

PRIMARY COMMUNICATIONS AND ENGAGEMENT TOOLS

Communications and engagement tools are divided into three categories in the table below:

- Tools to share information: Project staff deliver information to audience groups; one-way communication with the primary goal of informing.
- Tools to collect and compile input: Project staff deliver new information about project choices and ask for input or feedback from audience groups to help improve future decisions. The primary goal is to consult with stakeholders
- Tools to bring people together: Project staff host or engage in activities where there is multi-way communication and relationship building to promote involvement and collaboration by stakeholders to advance project development.³

At various points in the Project, different tools will be used to align with the needs and desires of the audience and Project team. For example, elected officials may have a role in maintaining the transportation system and require a deeper level of understanding and engagement. A resident who rarely drives on I-205 may be satisfied with reading information and completing a survey, but not participating in public meetings or committees.

³ These definitions are based on the Spectrum of Public Participation from the International Association of Public Participation.

https://cdn.ymaws.com/www.iap2.org/resource/resmgr/pillars/Spectrum_8.5x11_Print.pdf

Group, Stakeholder or Community	Primary Outreach and Communications Tools														
	Tools to bring people together			Tools to collect and compile input					Tools to share information						
	Adv. committee	Workshops/events	Equity discussion groups	Briefings, presentations	Open houses, webinar	Project email/V/M	Online surveys	Stakeholder interviews	Printed materials (incl translation)	Website tools (i.e. videos)	Social media	Newsletter text for community orgs	Fairs, festivals, tabling	News release/e-news	Direct outreach/mail
Historically, currently excluded & underserved communities (EJ, LEP, disabled, low income)	X	X	X	X			X	X	X		X	X	X		X
City, county, regional electeds (OR/WA)	X			X		X			X	X				X	
Agency staff from city, county, regional agencies (OR/WA)	X	X		X		X			X	X	X			X	
I-5 and I-205 drivers, commuters (OR/WA)	X	X			X	X	X			X	X		X	X	
Bicyclists & pedestrians	X	X		X	X	X	X			X	X		X	X	
Transit users	X	X	X		X	X	X			X	X		X	X	
Project area residents		X			X	X	X		X	X	X		X	X	X
Neighborhood coalitions		X		X	X	X	X		X	X	X	X		X	
School districts		X		X		X			X	X	X			X	X
Freight operators	X			X	X	X	X			X	X			X	
Businesses, business orgs stakeholders	X	X		X	X	X	X		X	X	X	X		X	X
Transportation focused advocacy organizations	X			X	X	X	X	X		X	X	X		X	
Environmental advocacy organizations	X			X	X	X	X			X	X	X		X	
Tribal governments				X					X						
OR/WA state legislators				X					X	X				X	
OR/WA federal delegation									X	X				X	
Regulatory, FHWA				X					X					X	
Rural, agricultural businesses (outside Project area)				X						X				X	

REPORTING AND EVALUATION:

Following each major decision milestone, Toll Program staff will report on the methods used to communicate and engage with stakeholders, the input received from different interest groups, and how that input influenced the project. In practice, project staff will develop a written report with information about notification strategies, engagement activities, who was reached and a summary of what was heard. Project staff will then provide that information to the decision-makers listed on page 3 and 4 of this plan before decisions are made. Finally, once decisions are made, those decisions will be reported back out in writing through the website and e-news and verbally through stakeholder briefings and committee meetings.

In addition, an evaluation will be conducted to gauge satisfaction and effectiveness of the engagement related to the decision milestone. The evaluation will use both quantitative tools (e.g. surveys and website analytics) and qualitative data (debrief meetings with engagement liaisons). The evaluation report will focus on the performance measures contained in this plan and will be used as the Toll Program plans the next phase of the project. The goal is to further improve engagement practices and relationship building.

Reports and evaluations will, at a minimum, be conducted at the following milestones:

- Start of the NEPA process
- Release of the Environmental Assessment for public review and comment
- Refinement of preferred alternative to include community mobility and equity strategies and mitigation before completion of the NEPA process

Additional informal reports will be conducted for any interim decisions. This includes monthly reporting to EMAC and Toll Program staff on the input and questions received from stakeholders on an ongoing basis.

ATTACHMENTS:

- A. Equity Framework – Adopted Dec. 10, 2020
- B. Equitable engagement plan – Finalized April 23, 2021
- C. Demographics – Final Dated Sept. 6, 2019
- D. Community Outreach Plan (latest draft May 1, 2020 – to be updated)
- E. Government and Media Relations (latest draft March 2021)
- F. Social Media Plan (latest draft June 5, 2020 – to be updated)
- G. Public Involvement Schedule (April 20, 2021)

I-205 Toll Project

Equitable Engagement Plan

Updated April 23, 2021

PURPOSE

The Oregon Toll Program is committed to minimizing burdens and maximizing benefits to communities historically and currently excluded or underserved by the transportation system. To achieve equitable outcomes and an equitable process in the I-205 Toll Project, the Oregon Department of Transportation seeks to actively engage these communities. The Oregon Toll Program will consistently and intentionally inform, listen to, learn from, and empower these communities throughout the Project's development, implementation, monitoring, and evaluation processes.

ODOT seeks to build trust in the community with the agency's planning and stewardship of the state's transportation system and its decision process. Trust is built by continually engaging a community and stakeholders throughout an entire phase, ensuring information is accessible to all and closing the loop by communicating to stakeholders how their feedback was incorporated in the project process. Consistent engagement coupled with a racial equity lens can help shape transportation policies, programs, and projects that better serve historically excluded and underserved populations.¹

Building trust requires time and repetition. Engagement efforts related to the Oregon Toll Program, in isolation, cannot achieve the goal of a trust relationship between ODOT and stakeholders. With active attention to the project's engagement goals, objectives and performance measures, progress will be made.

I-205 TOLL PROJECT SCHEDULE

	2020	2021	2022	2023	2024
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I-205 Toll Project		Environmental review			★ Earliest tolls begin
Equity	Equitable engagement				

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This plan is focused on the environmental review process for the I-205 Toll Project from early engagement in 2020 through the comment period on the draft Environmental Assessment, scheduled for mid-2022. A final decision based on public input is slated for early 2023. After the environmental review, equitable engagement will continue to inform future project phases.

INTEGRATION WITH OTHER PLANS

The I-205 Toll Project Public Involvement and Communications Plan and the Oregon Toll Program Equity Framework provide details on overarching principles, definitions, goals, objectives, performance measures, and messaging for all engagement activities. This Equitable Engagement Plan provides additional details and guidance for planning, engagement methods and timing.

The following principles, further discussed in the [Equity Framework](#), will guide implementation of all public engagement and communications:

- Incorporate a trauma-informed perspective in our current context.
- Begin with a racial analysis.
- Acknowledge historic context.
- Identify disparities.
- Prioritize input from impacted historically and currently excluded and underserved communities.
- Attend to power dynamics among stakeholders.
- Maintain a learning orientation.

EQUITABLE ENGAGEMENT CONSIDERATIONS

Tolling improves travel reliability and provides revenue to finance improvements in the transportation system. However, tolling may result in greater impacts to historically and currently excluded and underserved communities due to the potential for proportionally higher transportation costs, more limited transportation options in lower cost housing areas, limited schedule flexibility, and additional traffic rerouting through their neighborhoods by drivers attempting to avoid tolls.

Addressing challenges and limitations to make tolling work in the Portland metro area is central to the Oregon Toll Program. The Oregon Transportation Commission (OTC) has made the development of community mobility and equity strategies key components of successful toll projects.

To achieve outcome equity, ODOT will work with historically and currently excluded and underserved communities to ensure that tolls will be paired with strategies that:

- Help improve affordability of the transportation system.
- Improve access to opportunity through other transportation options; including improved transit.

- Address community health, including strategies to reduce negative effects to neighborhoods from changed traffic patterns, i.e. diversion.

AFFECTED COMMUNITIES

Audiences for engagement under this plan are those directly affected by the Project.

Historically and currently excluded and underserved communities dependent on or affected by I-205: People experiencing low incomes, youth, older adults, Black, Indigenous, multi-racial, and people of color, people who speak a language other than English, and people living with disabilities, who may face challenges accessing employment and other services. Reaching these audiences may occur through organizations providing services or advocacy, such as:

- Equity thought leaders; community-based organizations and faith-based organizations.
- Community Engagement Liaisons.
- Senior centers.
- Transit providers.
- Ride share services for people experiencing disabilities.

Ethnicity and language needs – The I-205 corridor population is 78 percent white (about 1.5 mile radius around the roadway from the Columbia River to where it connects with I-5). In the I-205 corridor, approximately 13 percent of the population along I-205 identify as Hispanic or with Latin American roots and 9 percent of the population identify as Asian in the I-205 corridor. This is a higher proportion than the rest of the region.

Spanish is the most common language spoken at home besides English throughout the region and is spoken by about 5% of the regional population. Other commonly spoken languages include Chinese, Vietnamese, Russian, Japanese and Arabic. The proportion of linguistically isolated households is slightly higher along the entirety of the I-205 corridor than the rest of the state/region.

Income – Slightly over one third of residents in the region earned \$50,000 per year or less. The 2013-2017 median income for households in the Portland metro area is about \$66,657. The Federal poverty level for 2017 was \$24,600 for a family of four. Higher median incomes are concentrated south and east of I-205 (Happy Valley and parts of West Linn).

Disability -- In the region, just over 10% of residents live with a disability. The most common types of disabilities along the highway corridors include ambulatory (5-6 percent), cognitive (5 percent) and independent living difficulties (4-5 percent).

Note: Demographic data is based on the U.S. Census prior to 2020. It is for informational purposes to guide engagement planning only. Additional analysis will be conducted as part of the environmental review process.

INCLUSIVITY STRATEGIES

Barriers	Strategies to Address
People with limited English proficiency	<ul style="list-style-type: none"> • Translate project fact sheet into languages commonly used by corridor residents at home. • Translate key pages to languages commonly used by corridor residents at home. • For less commonly used languages, use online translation tools to provide access to materials in languages other than English, as needed, while recognizing the limitations of these tools. • Engage speakers in discussion groups in their native languages. • Provide translators at workshops and open houses. • Project staff attend events with multi-lingual focus. • Include Title VI standard language for translation in all materials.
People without internet connection	<ul style="list-style-type: none"> • Make printed materials available at meetings, tabling events, interviews, open houses and committee meetings. • Provide options for in-person feedback, telephone feedback and postal mail.
People who do not attend public meetings	<ul style="list-style-type: none"> • Summarize public meetings in online materials. • Provide online or phone-accessible surveys. • Use online open houses, and digital and printed materials to reflect decisions made in a timely manner.
People who do not trust government entities	<ul style="list-style-type: none"> • Have most in-person meetings led by third party facilitators; clearly communicate who is on the project team and who will make decisions (e.g. ODOT or OTC). • Work with trusted partners such as community engagement liaisons or community organizations to deliver information in culturally-relevant and respectful ways.
People living with a disability	<ul style="list-style-type: none"> • Ensure all in-person and virtual venues are ADA accessible. • Ensure web content follows American Foundation for the Blind and Section 508 recommendations. • Provide meeting accommodations and ASL interpretation upon request.

FOCUSED STRATEGIES

Community Engagement Liaisons

Central to a successful equitable engagement effort is a partnership with professional community engagement liaisons. The Toll Program will contract with the Community Engagement Liaisons (CELs) Program and community-based organizations who specialize in grassroots outreach and organizing in their respective communities to engage the following

communities: People with disabilities, Black and African American, Native American, Vietnamese, Chinese, Latina/Latino/Latinx and Slavic communities.

The community liaisons are respected members of a specific ethnic, cultural, language, demographic, or geographic community who can act as a trusted ambassador between that community and the Toll Program, facilitating meaningful representation of that community and their interests within the public process.

The community liaisons will support engagement by:

- Identifying historically and currently excluded and underserved communities affected by the Project, including Title VI and Environmental Justice Populations.
- Using grassroots outreach tools such as social media, tabling, phone calls, texts, media outreach or other creative methods to distribute project information and encourage participation in public comment periods or public events (e.g. open houses).
- Answering project-related questions and serving as a connection between communities and project staff.
- Attending and providing interpretation services at public events.
- Planning, recruiting participants for and implementing informal discussion groups with project staff.

In person or online discussion groups will be informal, guided conversations with invited participants from identified communities. Key meeting characteristics include:

- Agenda, facilitation style and materials that aligns with specific cultural needs.
- Meetings will be about 1.5 hours in length and be conducted mostly in the native language of participants.
- Use of clear, visually focused, and easily accessible materials and content to promote consistent understanding of project information.
- Use of a discussion guide to promote thoughtful and engaging conversations that aid provide development.
- Use of participation incentives such as gift cards to acknowledge the time and expertise given to the meeting.

Outreach and partnership with community-based or faith-based organizations

The Toll Program will work to promote ongoing conversations and partnerships with local organizations that support, advocate for or provide services to historically or currently excluded or underserved communities. This approach aims to foster relationship building by collaborating with organizational and community leadership to connect with the intended audiences at times and locations where they already meet or work.

Methods:

- Presentations: Providing an update to a group or organization at a regularly scheduled meeting.

- Briefings: A meeting scheduled with one person or a small group of people from an organization to share information and gain feedback.
- Toolkits: A “toolkit” will be created and regularly updated for specific engagement periods to support connections and outreach. It will include relevant project information and materials, such as fact sheet or newsletter text, sample social media text, notification flyer, and a comment form or link to a survey.
- Online discussion groups to promote thoughtful and engaging conversations that aid provide development.

Preparation of Accessible Materials

The Oregon Toll Program will create materials that are accessible to people living with disabilities. Strategies to be used include:

- Ensure all in-person and virtual venues are ADA accessible.
- Follow American Foundation for the Blind and Section 508 recommendations for websites and printed materials.
- Provide meeting accommodations and ASL interpretation upon request.

As part of its equitable engagement approach, the Oregon Toll program will ensure access to information related to focused engagement methods (i.e., discussion groups and community workshops) with translation.

The ODOT Limited English Proficiency Plan refers to a 5 percent threshold of affected community for translation. The Toll Program is committed to a 3 percent threshold instead for translation decisions, exceeding Federal guidance and requirements, to meet equitable engagement objectives.

All written and posted informational English language materials will contain language in four languages offering translation upon request. (See the end of this document for the standard language in Spanish, Vietnamese, Russian and Chinese.)

Key materials that provide project-level information in a format that can be scaled and widely distributed should be made available in Spanish, Chinese, Vietnamese, and Russian. These include:

- Factsheet.
- Notices for public engagement opportunities.
- Engagement surveys.

As part of its equitable engagement approach, additional materials related to focused equitable engagement methods (i.e., discussion groups and community workshops) may be translated. The following list of materials may be needed for focused engagement methods.

- FAQs.
- Project updates (i.e., e-newsletters, mailers, social media postings).
- Web pages.
- PowerPoint presentations.
- Notification toolkits with copy for community based organizations to share with their networks.

COMMUNICATIONS AND ENGAGEMENT TOOLS

Robust and meaningful public engagement requires identifying the right tool for the right audience at the right time. With continuing social distancing guidelines due to the COVID-19 pandemic, there will be more reliance on digital tools.

For each historically and currently excluded and underserved community that ODOT engages with, the community's needs, priorities, and power structures will be assessed. For these audiences it is especially important to deliver information in a way that allows people to see themselves among those who will receive benefits and are part of the decision-making equation.

The Oregon Toll Program will be thoughtful and intentional about the tools that may need to be employed to meaningfully engage with certain communities and groups, such as:

- Equity thought leaders and community-based organizations.
- Environmental justice community.
- New Americans, including immigrants and refugees, as well as people with Limited English proficiency.
- Community elders and senior center users.
- Transit dependent individuals.
- People living with disabilities who may depend on ride-share services.

With this in mind, the Oregon Toll Program's communications and engagement tools are divided into three categories:

- Tools to share information: Project staff deliver information to audience groups; one-way communication with the primary goal of informing.
- Tools to collect and compile input: Project staff deliver new information about project choices and ask for input or feedback from audience groups to help improve future decisions. The primary goal is to consult with stakeholders.
- Tools to bring people together: Project staff host or engage in activities where there is multi-way communication and relationship building to promote involvement and collaboration by stakeholders to advance project development.

Below are the various tools and tactics used by ODOT to engage with historically and currently excluded and underserved communities, based on needs, priorities, and power structures.

I-205 Toll Project Equitable Engagement Plan
 April 23, 2021

Tactic	Engagement category/goal	Audiences
<p>Equity and Mobility Advisory Committee (EMAC): A committee of people with professional or lived experience in equity and mobility was formed to advise the OTC and ODOT on how tolls on the I-205 and I-5 freeways, in combination with other demand management strategies, can include benefits for populations that have been historically or currently excluded or underserved by transportation projects. Timing: 2020-2022</p>	<p>Involvement and collaboration to advance project development</p>	<p>People historically or currently excluded or underserved by transportation projects; local agency partners; community-based organizations</p>
<p>Workshops and events: Project staff present information and gain feedback about project development at in-person or online gatherings. Can be co-hosted with local community organizations. Timing: Tied to development of mitigation strategies and preferred alternative</p>	<p>Consult and involve audiences to advance project development</p>	<p>People historically or currently excluded or underserved by transportation projects who depend on I-205; community-based organizations</p>
<p>Equity discussion groups: Community engagement liaisons or community organizations host discussion groups with specific community representatives from communities of color to gain input on equity and mobility strategies. Timing: Tied to development of equity and mobility strategies, toll policies.</p>	<p>Consult and involve audiences to advance project development</p>	<p>People historically or currently excluded or underserved by transportation projects</p>
<p>Personal relationships: Community liaisons and EMAC members answer questions received from their communities about the project and serve as a connection to project staff and decision makers, especially during the COVID-19 pandemic when in-person outreach by project staff is more limited. Timing: Throughout project development</p>	<p>Consult and involve audiences to advance project development</p>	<p>People historically or currently excluded or underserved by transportation projects</p>
<p>Briefings and presentations: Project staff meet with people who represent stakeholder interests expected to be affected by the project to provide information, build project awareness, identify challenges or opportunities. Can be held virtually or in-person to meet communities where they are. Timing: Throughout project development</p>	<p>Consult with stakeholders to help improve future decisions.</p>	<p>Community-based organizations; equity thought leaders; service organizations</p>
<p>Online open house/surveys: Information is presented to gain feedback about project design and preferred alternative. Surveys will be translated to multiple languages. Timing: At official public comment periods; Mid-2022</p>	<p>Consult with stakeholders to help improve future decisions.</p>	<p>All</p>
<p>Stakeholder interviews: Project staff meet individually with community leaders to gain focused and personal input for project planning. Timing: Early 2020 (equitable engagement strategies)</p>	<p>Consult and involve audiences to advance project development</p>	<p>Equity thought leaders; community-based organizations</p>
<p>Printed materials and website, including materials translated into languages other than English: Present project purpose, benefits, design, ways to contact project staff, ways to participate or get more information.</p>	<p>Share project information</p>	<p>All</p>

I-205 Toll Project Equitable Engagement Plan
 April 23, 2021

Tactic	Engagement category/goal	Audiences
Timing: Throughout project development; comprehensive update slated for spring 2021		
<p>Social media: Project staff, community liaisons, community organizations, agency partners will promote project information with free and paid posts across various social media platforms. Social media may be used to notify audiences of public comment opportunities or to promote project awareness. Providing project updates and feedback channels through Facebook, Twitter, and other social media platforms provides engagement opportunities for youth, communities of color, people who primarily engage with social media to consume news and people without stable or conventional internet access on a computer. Use of social media is especially important during the COVID-19 pandemic when social distancing limits in-person interactions.</p> <p>Timing: Throughout project development to build awareness of tolling in general and toll project; paid advertising will be used during official comment periods</p>	Share project information	All
<p>Outreach to ethnic media outlets: Project staff or community liaisons will deliver information or participate in interviews in multiple languages to build awareness of project developments.</p> <p>Timing: Throughout project development and particularly at in early-mid 2021 and official public comment periods</p>	Share project information	People historically or currently excluded or underserved by transportation projects
<p>Online tools, including e-newsletter, texts: Regularly share project news and updates and ways to participate through opt-in delivery channels.</p> <p>Timing: Throughout project development</p>	Share project information	All
<p>Toolkit for community organizations: Share written information about the project either in printed or electronic form to distribute to their networks. Toolkit can include: sample social media posts, sample newsletter text, flyers, fact sheets or other materials. This strategy engages the public through “trusted messengers” – individuals and organizations that community members already know and regularly obtain information from. Community organizations, especially those serving people who speak languages other than English, are best equipped to provide information to their networks.</p> <p>Timing: At least twice per year and associated with awareness-building efforts and public comment periods.</p>	Share project information	Community-based organizations; equity thought leaders; service organizations; members of Equity and Mobility Advisory Committee
<p>Fairs, festivals, and tables at community events and locations: Staff information tables at fairs and festivals throughout the project area primarily during warm weather months to distribute information about the project and alert community members to</p>	Share project information	All

I-205 Toll Project Equitable Engagement Plan
 April 23, 2021

Tactic	Engagement category/goal	Audiences
public input opportunities. Examples include: farmers markets, school functions, church or religious center functions, community centers, and while engaging in traditional commerce, such as shopping at a local grocery store. Timing: Summer 2022 (when public health guidance allows)		
Direct outreach and mail: Flyers and mailers with project information and public input opportunities will be distributed through U.S. Postal Service or through canvassing businesses or service organizations near the project. Timing: In advance of community workshops and formal comment periods	Share project information	People who live close to the project area, service providers in the project area; people without internet, people who do not attend community meetings

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

Nếu quý vị muốn thông tin về dự án này được dịch sang tiếng Việt, xin gọi 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，我們有提供繁體中文翻譯，請致電：503-731-4128。

如果您想了解这个项目，我们有提供简体中文翻译，请致电：503-731-4128。

For 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.

I-5 and I-205 Toll Projects



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RPAS Roster

Regional Partner Agency Staff Roster	
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Anna Dearman	City of Vancouver
Anne McErney-Ogle	City of Vancouver
Cincy Remy	Washington County -- Comms
Darren	City of Gladstone
Dayna Webb	City of Oregon City
Don Hardy	City of Canby
Dyami Valentine	Washington County
Erin Wardell	Washington County
Eve Nilenders	TriMet
Gery Schirado	City of Durham
Gregg Snyder	City of Hillsboro
Gupta Hersh	ODOT
Gwenn Baldwin	
Hau Hagedorn	Portland State University / R1ACT
Heather Sturgill	Washington County -- Comms
Hector Rodriguez-Ruiz	ODOT
Jason Gibbens	WSDOT
Jason Kelly	ODOT
Jennifer Garbley	City of Milwaukie
Jessica Berry	Multnomah County
Jessica Stanton	ODOT
Joseph Auth	City of Hillsboro
Kate Lyman	TriMet
Kathleen Stewart	ODOT
Kayla Hootsmans	ODOT
Kirsten Hauge	Kearns and West
Lindsey Baker	ODOT
Maria Ellis	ODOT
Maria Sipin	ODOT
Mauricio LeClerc	PBOT
Melissa De Lyser	Washington County -- Comms
Michele Godfrey	ODOT
Nick Fazio	WSP
Paul Scarlett	ODOT
Pia Welch	R1ACT
Public Works Office	City of Gladstone
Ray Atkinson	Clackamas County Community College
Ryan Hart	Port of Vancouver
Ryan Potter	City of Canby
Sandra Hikari	ODOT

RPAS Roster

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Scott Patterson	C-Tran
Shoshana Cohen	PBOT
Stephanie Millar	ODOT
Steve Stuart	City of Ridgefield
Susie Lahsene	City of Rivergrove
Sylvia Ciborowski	Kearns and West
Taylor Steenblock	Multnomah County -- Government Relations
Temple Lentz	Clark County
Tia Williams	ODOT
Todd Wood	City of Canby
Tom Bouillion	Portl of Portland
Tom Kloster	Metro
Tom Strader	South Clackamas Transit District
Trent Wilson	Clackamas County
Yosef Yip	WSP
William Farley	City of Lake Oswego
Anne Presentin	WSP
Alyssa Cameron	ODOT
Brendan Finn	ODOT
Carolyn Holthoff	ODOT
Della Mosier	ODOT
Don Hamilton	ODOT
Garet Prior	ODOT
Heather Wills	WSP
Jennifer Rabby	WSP
Josh Channell	WSP
Lucinda Broussard	ODOT
Mat Dolata	WSP
Michael Holthoff	ODOT
Mike Mason	ODOT
Page Phillips-Strickler	Strategies 360
Sine Madden	WSP
Aaron Lande	City of Vancouver
Alex Oreschak	Metro
Amy Pepper	City of West Linn
Anne Buzzini	Metro
Barry McDonnell	City of Camas
Bob Hart	SW Washington Regional Transportation Council (RTC)
Bob Kellett	City of Portland
Brian Hodson	City of Canby
Carol Snead	ODOT
Casey Liles	WSDOT
Chris Deffebach	Washington County
Chris Fick	Multnomah County
Chris Johnson	Metro
Dave Roth	City of Tigard

RPAS Roster

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Don Odermott	City of Hillsboro
Elizabeth Mros-O'Hara	Metro
Emily Cline	FHWA
Emma Sagor	City of Portland
Erica Rooney	City of Lake Oswego
Everett Wild	Clackamas County
Grace Cho	Metro
Jacque Betz	City of Gladstone
Jamie Huff	City of Happy Valley
Jamie Stasny	Clackamas County
Jay Higgins	City of Gresham
Jean Senechal Biggs	City of Beaverton
Jeff Owen	TriMet
Jennifer Campos	City of Vancouver
Jim (Curleigh) Carothers	City of Camas
Jim Hagar	Port of Vancouver
Jim Whynot	City of Gladstone
John Williams	City of West Linn
Karen Buehrig	Clackamas County
Kari Linder	City of Lake Oswego
Katherine Kelly	City of Vancouver
Kelsey Lewis	City of Tualatin
Kim McMillan	City of Tualatin
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Lindsey Shafar	Clark County
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Matt Bihn	Metro
Matt Ransom	RTC
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Mik Bombar	Port of Vancouver
Mike McCarthy	City of Tualatin
Nathaniel Price	FHWA
Rebecca Kennedy	City of Vancouver
Steve Kelley	Washington County
Steve Wall	City of Camas
Steve Williams	Clackamas County
Taylor Eidt	C-Tran
Tom Mills	TriMet
Zachary Weigel	City of Wilsonville
Jon Makler	ODOT

RPAS Roster

I-5 and I-205 Toll Projects



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OREGON TRANSPORTATION COMMISSION

**Minutes of the Regular Business Meeting
March 11, 2021
Salem, Oregon**

The regular meeting began at 9:00 a.m. at the Oregon Department of Transportation Headquarters in Salem, Oregon.

Video recording of the meeting is available online through the Commission website:
<https://www.youtube.com/user/OregonDOT/live>.

Background materials for all agenda items are stored in **Director/Commission/History Center File, Salem, Oregon.**

Notice of these meetings was made by press release to local and statewide media circulation throughout the state. Those attending part or all of the meetings included:

Chair Robert Van Brocklin	Delivery and Operations Div. Administrator
Vice Chair Alando Simpson	Karen Rowe
Commissioner Julie Brown	Deputy Delivery and Operations Div.
Commissioner Sharon Smith	Administrator McGregor Lynde
Director Kristopher Strickler	ODOT Chief Engineer Steve Cooley
Asst. Director for Finance and Compliance	Policy, Data and Analysis Division
Travis Brouwer	Administrator Jerri Bohard
Asst. Director for Operations, Cooper Brown	Public Transportation Division Administrator
Asst. Director for Social Equity Nikotris Perkins	Karyn Criswell
Asst. Director for Government and External Relations Lindsay Baker	Interstate Bridge Replacement Program
Climate Office Director Amanda Pietz	Administrator Greg Johnson
Urban Mobility Office Deputy Director Della Mosier	Assistant Interstate Bridge Replacement
ODOT Region 4 Manager Gary Farnsworth	Program Administrator Ray Mabey
	Commission Coordinator Sabrina Foward
	Temp. Commission Assistant Jessica Virrueta

Chair Van Brocklin called the meeting to order at 9:00 a.m.

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***Chair's Report
Agenda Item A***

Oregon Transportation Commission (OTC) Chair Robert Van Brocklin welcomed those tuning in and participating in the meeting and thanked the public for their submitted comments. He noted there would be live closed-captioning available to assist in transcribing the meeting. He reserved time to welcome the Commission's new Coordinator, Sabrina Foward. He also noted that Vice Chair Simpson was delayed and would be joining the meeting late, but would be working with a quorum of three which is an official quorum of the Commission and would be able to take action on items if needed.

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Director's Report
Agenda Item B

ODOT Director Strickler provided a report to inform the Commission of two items of interest and yielded his remaining time to McGregor "Mac" Lynde, Deputy Delivery and Operations Division Administrator, for a brief wildfire update.

Winter Ice Storm February 12-16, 2021:

Large amount of ice and power loss across Oregon. Congratulated our team for a job well done and jumping into action and keeping the roads bare or in slush conditions. Twelve of our state operated radio stations lost power and were using backup generators. Significant coordination with utilities and other jurisdictions happened. Many facilities were closed to replace or repair some of the electrical lines for Oregonians. Interagency cooperation and cooperation with the public utility partners is something we are proud of as an agency

Troy Costales Retirement May 1, 2021:

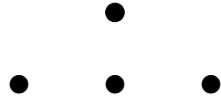
Troy served 36 years in local service, 33 years with ODOT, 21 years as a Division Administrator. Troy has helped lead Oregon to the highest seatbelt use rate of any state, 98.2 percent, states lowest fatality toll since the 1940s, and one of the largest fatality declines from one year to the next. Director Strickler shared additional information with Troy's tenure at ODOT, including serving in all of the divisions within ODOT.

Wildfire Update from Mac Lynde:

Mac gave an update, 6 months from the previous update, on where ODOT is at as the agency takes the lead role in cleaning up hazardous trees as well as burned down homes and businesses. He is currently leading the cleanup efforts from the wildfires that occurred fall of 2020. There's an online dashboard (wildfire.oregon.gov/cleanup) that members of the public can go to sign up for updates and get up to date information on where the agency is at with cleanup efforts. Mac presented a [PowerPoint](#) with updates on the wildfire recovery efforts. There is an email (odot.wildlife@odot.state.or.us) and also a hotline (503-934-1700) that is staffed by a team to help respond to questions or inquires.

Discussion:

Chair Van Brocklin acknowledged Director Strickler’s report. Chair Van Brocklin took a moment to discuss the winter ice storm and how impressed he was with the cooperation to solve electrical outages. He also congratulated ODOT for their role and quick response in challenging conditions. Chair Van Brocklin commented about Troy and thanked him for his work with the agency. Commissioner Brown thanked Troy for his work with ODOT and mentioned working with him on the safety committee. Commissioner Smith congratulated Troy for his work with the agency and wished him a great retirement.



***Real-Time Virtual Oral Public Comment
Agenda Item C***

Mayor Scott Hill, City of McMinnville, commented on Highway 99W/18 bypass (Newberg Dundee Bypass) and provided a bypass information sheet with updates. He recognized great support that the bypass committee has received from OTC and ODOT, with special recognition to John Huestis, Sonny Chickering and Travis Brouwer along with OTC Chair Van Brocklin and Director Strickler. He acknowledged a true partnership in the work they are trying to accomplish. There’s a need for state and local investment to leverage federal dollars. He shared his thoughts on the priority level of this project and successes through phase one and that phase two is shovel ready. Newberg Dundee is a high priority effort. Thanked ODOT and OTC in the partnership and they are committed as communities to do their local matching and hope to see this project as a priority for ODOT and OTC.

Casey Kulla, Yamhill County Commissioner, commented on Highway 99W/18 bypass (Newberg Dundee Bypass) and spoke on behalf of parkway committee for the county. He spoke on the importance of the project and completing the remaining two phases. He mentioned that state agencies need to address climate issues and equity in their project and noted that this project is equitable and would help keep diesel fuels out of the inner city thus furthering climate goals. He has three requests for the Commission: First he asked the Commission to hold ODOT accountable to building protective paths along the corridor as soon as possible. Second he requested the Commission to hold ODOT accountable to require bus rapid transit design features in this project. Third request is to require an equity advisory committee for the project in order to make good planning and design decisions. In closing he mentioned that it was the tenth anniversary of the 9.1 magnitude earthquake and tsunami in Japan that destroyed the Fukushima power plant and that Oregon’s shake alert system is being activated on the anniversary. He also mentioned that a stable lifeline to the coast may be the difference between community recovery and community abandonment.

Tribal Councilor Denise Harvey, Confederated Tribes of Grand Ronde, commented on Highway 99W/18 bypass (Newberg Dundee Bypass) and emphasized the importance of the travel economy, the coastal economy, and wine industry that is all supported by the bypass and the tourist opportunist across the entire travel shed. There’s an importance of the west valley being supported with good transportation opportunities for employees and citizens of the areas. She also mentioned forest fires and coastal evacuations with Grand Ronde becoming the command post and fire camp

for over 200 wildland fire fighters in the area. It is extremely important to have a way in and out for public safety in a natural disaster. Phase one has already made a significant difference for commuters and emphasized the importance of completing the bypass and looks forward to seeing the bypass completed in the near future.

Brian Worley, County Road Program Director, Association of Oregon Counties, commented on agenda item H: Federal COVID-19 Relief Funding Allocation. His colleague Jim McCauley, Legislative Director for League of Oregon cities, was unable to attend but Worley referenced their jointly submitted written testimony in support of agenda item H. He thanked OTC and ODOT in recognizing the importance of the city and county transportation system in the updated funding relief proposal. It takes a balanced approach and supports local governments who have lost significant revenue due to the pandemic. He thanked ODOT leadership staff Travis Brouwer, Jeff Flowers and Trevor Sleeman for working closely with local government partners and listening closely to feedback and shared priorities. Relief funding is desperately needed at this time and will help city and counties with budget deficits, delayed projects, work force shortages, hiring freezes and for some, may prevent layoffs. He discussed the differences in how the funding is split in the earlier proposal and the current proposal. It is greatly appreciated and represents a more balanced and equitable approach to following the statutory highway funding sharing agreement. He looks forward to the continued partnership and support with local governments.

William J. Cook, Special Counsel, Cultural Heritage Partners, PLLC spoke on the behalf of Patricia Benner of Corvallis Oregon, resident and business owner, and commented on the Van Buren Bridge Project in Corvallis, OR. He stated that Patricia seeks to help ODOT find a way to protect and preserve the Van Buren Bridge. It has been determined eligible for listing as a national register of historic places. They believe ODOT is skipping legal steps in the mandatory environmental review including not preparing an environmental assessment or environmental statement that is required by NEPA. Written comment explains they asked ODOT to reassess their decision to exempt the project for NEPA review. Second, they believe ODOT cannot propose demolition of a bridge without an evaluation of the proposed demolition and placement according to part of the Oregon transportation act of 1966. William discussed the law and what it includes. He believes it would be helpful for ODOT to update the public on their compliance with the mandates. Third, they believe that section 106 has not been followed by ODOT and that demolition isn't appropriate. Going forward, they ask that ODOT provide a timeline of how and when ODOT intends to comply with federal historic preservation review laws and requests that the Van Buren Bridge be preserved.

Patricia Benner commented on the Van Buren Bridge Project in Corvallis, OR. Thanked the Commissioners for the work that ODOT does for the state. She is speaking to urge ODOT to repurpose the Van Buren Bridge as a pedestrian and bicyclist river crossing after the new bridge has been constructed. SMG has studied moving the bridge 150 feet up river and has been found to be practical and feasible at about half of ODOT's cost to the city council. The bridge would be placed on seismically sound piers and the new location would serve bicyclists and pedestrians along highway 34 as well as local users. Patricia talked about who the bridge should serve and how it should be designed. Patricia submitted a written testimony and pointed the Commission to review it for additional safety information. As she is not an expert in historic preservation, she hired Mr. Cook for his expertise and he spoke earlier and submitted written comments on her behalf.

Kathleen Harris signed up for public comment on the Van Buren Bridge Project in Corvallis, OR, but did not call in to provide public comment.

Kim Fella commented on what she believes to be willful neglect of surface water on Highway 260 - Josephine County. She gave her address and wanted to bring to light what she feels is neglect by ODOT and feels strongly that the Commission should take action on this matter. She described when she purchased her home and that it was once highway 260 and was relinquished to Josephine County along with \$6.4 million for maintenance that she doesn't believe has been performed. Fella also mentioned that she is being sued by her neighbor for blocking a culvert that he installed in a FEMA floodway without a survey or permission on a private easement. The culvert floods her field and has flooded her neighbors pump house, garage and a portion of her home. She believes the majority of water is runoff from Lower River Rd (previously Highway 260). That portion of the road has standing water most of the winter season and causes road hazards, a she believes a high water sign is not enough. She also described her neighbor's property and what they built to mitigate the runoff on their property. She believes it is willful neglect and shared her YouTube channel (Kizzy Josephine County Oregon) where people can go to view her claims.

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Climate Office Update
Agenda Item D

The Commission received an informational update from the ODOT Climate Office on efforts to implement Executive Order 20-04, the Strategic Action Plan and to integrate climate considerations throughout the Agency.

Background:

ODOT formed the Climate Office nearly a year ago and has accomplished a lot since that time, although much work still remains. The Office focuses on reducing emissions and pollution from transportation and adapting to the impacts of climate change. The Commission last received an update on the progress of efforts in October 2020, and interfaced frequently with the Climate Office in the deliberation of funding allocations for the 2024-2027 Statewide Transportation Improvement Program (STIP) through December 2020.

Several of the efforts of the Climate Office are directed by Oregon [Executive Order 20-04](#), which requires ODOT to add a climate lens to STIP decisions, identify statewide needs for public electric vehicle charging infrastructure, collaborate with other state agencies on greenhouse gas (GHG) reduction activities ([Every Mile Counts](#)), and integrate climate considerations into agency practices. Attachment 1 provides an overview of ODOT's progress implementing Executive Order 20-04 over the last year, and was submitted to the Governor's Office March 1, 2021. Additionally, other climate-related actions are identified as Strategic Outcomes in the 2021-23 [Strategic Action Plan](#). These and other efforts are underway and staff will provide an update on progress and expected outcomes.

Additionally, staff will discuss the concept of a 5-year ODOT Climate Work Plan. The Work Plan will direct activities of the Climate Office and other groups within ODOT to reduce GHG emissions

and prepare for the impacts of climate change. Attachment 2 provides a preview of actions that are either underway or under consideration over the next five years. The draft list pulls from the [Statewide Transportation Strategy: A 2050 Vision for GHG Reduction](#) (STS), 2021-23 Strategic Action Plan, Executive Order 20-04, and other critical work. The ODOT Climate Work Plan should include those actions most critical or foundational in the next five years, recognizing the need for additional, sustained long-term efforts. ODOT will update the Work Plan every five years. Staff recognizes that there may be important work items missing from the current short-term list of potential actions in Attachment 2, and welcomes public and Commission feedback.

Attachments:

1. Attachment 1 – *ODOT Takes Steps to Address Oregon’s Climate Crisis: Progress Overview of Executive Order 20-04 Implementation (March 2020-March 2021)*
2. Attachment 2 – *Draft Climate Actions Under Consideration for a 5-Year ODOT Climate Work Plan*

Presentation:

Amanda Pietz presented a [PowerPoint](#) with updates on the Climate Office as well as their current efforts and focus areas (action plan). The Climate Office is composed of three parts: mitigation, adaptation, and sustainability. March 10th was the one year anniversary of the climate executive order. [Attachment 1](#) is the complete packet that was submitted to the Governor on what the agency has done to comply with the executive order. Amanda highlighted a few topics within the attachment: How ODOT has embraced climate as a top priority within the agency, a significant investments in climate, and integrating equity and climate justice in everything that they do do.

Discussion:

Commissioner Smith thanked Amanda for her work and accomplishments in just one year and looks forward to the continued efforts. Chair Van Brocklin agreed and noted there is a lot of work to do and Amanda’s leadership has been noticed and is appreciated. He mentioned one example of major headway – automobile manufacturers. They announced that they are phasing out the combustible engine to electric/non GHG producing for many vehicles. It is an example of what is going on elsewhere and is going to effect the country and world. We look forward to partnering more broadly as initiatives are taking in the public and private sectors. OTC looks forward to Amanda’s leadership, council and partnership in making progress in areas that have been identified and those yet to be identified, it is an evolving landscape.

Action:

None taken.

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Interstate Bridge Replacement Update
Agenda Item E

The Commission received an informational update on the recent work of the Interstate Bridge Replacement team.

Background:

The Interstate Bridge Replacement program is working with its partners, advisory groups, and community members to update Purpose and Need and define community Vision and Values this spring. Once completed these key elements will be used screen alternative design concepts which will eventually lead to a preferred alternative. The program will have recently conducted a large community engagement effort around getting feedback from the public on Purpose and Need and Community Vision and Values. Part of this work was an online open house, a community survey, newsletters, and community briefings. This update will cover feedback we have heard from the community engagement effort, and from program partners and advisory groups.

Presentation:

Greg Johnson presented a [PowerPoint](#) with updates on the Interstate Bridge Program activities. Greg went over the program timeline that had originally started in 2004. Waiting for a Federal record of decision that should happen in 2024 and would allow design and construction in 2025. Ray Mabey went over changes that have happened since the program started including a focus on climate and equity. He also noted that transportation problems that were previously identified still remain and have been confirmed by partners and community engagement efforts. They are setting a foundation by determining the purpose and need and hope to have it completed by the end of spring 2021. Greg went over the current advisory groups, their purpose, and meeting frequency as well as community outreach and community conversations that are happening. They will seek to come back to the Commission toward the end of May with the finalization of purpose and need and vision and values after final comments.

Discussion:

Commissioner Brown thanked Ray and Greg for their presentation and they answered her biggest question, where can the public get information. She encouraged everyone to use the public website. Commission Chair Van Brocklin also encouraged public input and participation in the process.

Action:

None taken.

The Commission recessed for break at 10:50am and convened at 11:00am.

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***Review of 2021-23 OTC/ODOT Strategic Action Plan Progress Report
Agenda Item F***

Reviewed the Strategic Action Plan (SAP) Progress Report and discussed the status of activities from launch of the SAP through February, 2021.

Background:

ODOT has transitioned to the execution of the SAP following OTC approval in October 2020. In December 2020, the OTC received a baseline SAP Progress Report and set an expectation that ODOT provide progress updates every other OTC meeting through 2021.

The March OTC presentation, will provide:

- an update of the SAP implementation progress in achieving the SAP Outcomes;
- a review and discussion of milestones that require modification from the baseline established in December 2020—addressing anticipated changes in schedule related to equity and sustainable funding actions; and
- an overview of activities related to a featured Strategic Outcome—Reducing Congestion in the Portland Metro Region.

Staff propose over the course of the 2021-2023 SAP, that OTC discussions will feature one to two Strategic Outcomes for a deeper discussion regarding the work accomplished, anticipated issues and next steps.

Next Steps:

Staff will respond to OTC feedback discussed in March and provide the next SAP Progress Report in July 2021. As part of the July OTC presentation, staff will highlight progress on metric development featured in the web dashboard.

Attachments:

- Attachment 1- *Strategic Action Plan Progress Report – March 2021*

Presentation:

Cooper Brown summarized what guidance was given by the Commission in December and the frequency that they will come back with updates. Every time they come before the Commission to present updates they will highlight one item. For this month they are going over the congestion reduction work in the Portland Area that the Urban Mobility office is leading. Della Mosier helped with the presentation. Instead of having every Assistant Director speak during the progress report, they will rotate for each meeting. The Assistant Directors will be available for questions as well as the outcome leads for each effort. Cooper and Della presented a [PowerPoint](#) and gave a progress update for the SAP. Cooper went over the highlights of the [progress report](#). Della focused on the 2021 milestones to reduce congestion in the Portland Region. Cooper requested thoughts and feedback on the SAP progress report or questions for Della on congestion work. Cooper also asked for concerns, comments, or feedback on the report itself. Cooper then continued the presentation on SAP communications and to answer Vice Chair Simpson's question. They are working on a web-dashboard and will bring it back to the Commission in July.

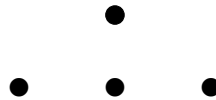
Discussion:

Welcomed Vice Chair Simpson to the meeting. Chair Van Brocklin congratulated the team on the implementation and progress of the Strategic Action Plan. Chair recommended a scoreboard or dashboard for the SAP progress report. A standardized format would be helpful so they know where to look. Vice Chair Simpson had a comment about the congestion management strategy in Portland; the Commission is aware and in support of what staff is doing as they stay innovative and evolving

the agency and is essential trying to address needs and concerns. He thinks it is good that we can share what's being worked on and shifts we are embracing internally, but brought the question of how we are communicating that out externally. Communication, internally and externally, is a big part of the SAP. Lindsay Baker added comments about communications and gave additional information on plans for the dashboard. It is a fundamental change and how we approach the work, it will be on a longer term horizon than what the Agency has worked on in the past. Integrated coordination is helping with the communication efforts. The next update will be in July.

Action:

None taken.



***Update the Commission on the cost reduction efforts underway with the ADA Program
Agenda Item G***

Travis Brouwer gave an opening statement on financial updates and then presented a [PowerPoint](#). Topics included modal equity, funding allocations for 21-24 STIP compared to 24-27, analysis of forecasting of dedicated federal and state funding (totals to 1.28 billion over the forecasted time), highway and non-highway funding comparisons, funding vs. needs for the 24-27 STIP (not meeting 30% of needs in most categories), there's a gap of over \$500 million annually, turning to tolling to help manage congestion and fund projects, and reviewed public transportation need vs. funding chart.

Discussion:

Commissioner Smith asked Travis how ODOT comes to the numbers of need. Most of the slides are based on the investment strategy that the Commission approved last year. It laid out what the needs were from, the background work that ODOT has been working on for years, helped determine what the need was. The climate office used it for their analysis and Travis used it for his program level gaps, it came directly from work that the Commission has done in the past. Chair Van Brocklin noted that the investment strategy report is one of the best things we have to articulate the challenge that Travis and Commissioner Smith articulated.

Travis then introduced the ADA topic, noting that the Commission has provided a significant amount of money over the recent years. They thought it would be important to give an update on how we are being good stewards of tax payer resources and what we are doing to ensure we are completing projects in a cost effective manner. Travis introduced Karen Rowe and Steve Cooley, who gave an update on the ADA program.

Background:

The primary purpose of the ADA program and ODOT's participation, is to ensure that ODOT programs are accessible and that pedestrians with disabilities have an equal opportunity to use the transportation system in an accessible and safe manner.

ODOT and the Association of Oregon Centers for Independent Living, et al. (AOCIL) entered into a 15-year settlement agreement (Agreement) on November 2, 2016, to make state highways more

accessible to people with disabilities. The agreement will lead to major improvements to pedestrian accessibility along the highway system including installing missing curb ramps to connect parts of communities that have been difficult or unsafe to access because of an incomplete system and upgrade substandard existing curb ramps to improve mobility and safety along the highways for all users.

This presentation provides an ongoing update on our progress in meeting the expectations of the March 2017 ADA Accessibility settlement agreement, including program timeline, funding needs, and ongoing efforts to reduce costs and find program efficiencies. The requirements of the agreement established a total count of 27,327 curb ramps on ODOT's transportation system, of which, 25,899 of these were determined to be non-compliant. Milestone targets for the next 15 years are 7,770 ramps updated by 2022 (30%) and 19,424 ramps by 2027 (75%) and 25,899 (100%) by 2032. The program is at a critical point in replacing the almost 8,000 ramps required by next year; and is on track to meet the milestones specified in the settlement agreement.

Cost Reduction Actions

Since 2017 the ADA program has been working on meeting the requirements in the settlement agreement by setting up the program, ensuring construction compliance and developing projects to meet the 2022 milestone. ODOT is aware of the importance in reducing the overall cost of the program and recognizes the impacts to other programs. ODOT has implemented and continues to do training for ODOT and contractors in design and construction to reduce the risk of reconstruction of the ramps that don't meet compliance. About 400 ramps a year are included in projects already in the STIP and are being replaced as part of the program. ODOT has identified three main areas of focus:

Ramp Design Changes: ODOT has made major changes to design and construction practices to ensure compliance with current ADA standards, and requirements of the settlement agreement. One of the cost increases in the program has been related to an increase in additional right of way. Initially the estimate of right of way was made at approximately 15%-20% of the ramps. This estimate was based on construction of pilot projects in 2018-2019 which demonstrated constructing ramps generally in existing right of way. However the group of projects in 2020-2021 had more unique challenges at individual ramp locations in design and temporary pedestrian access, which required additional right of way. Currently, approximately 50% of the ramps require some form of additional right of way, either permanent or temporary. This results in a substantial increase in dollars and time. The main focus of this effort is to reduce the overall footprint and minimize the need for additional right of way to construct the ramp. Currently ODOT is evaluating design practices and looking for opportunities to maintain compliance, while constructing ramps within our existing right of way. ODOT is engaging with internal staff and consultant partners (ACEC) to help identify process improvements and minimize scope creep in designs. Design guidance is being developed and will be distributed and available this April for projects in 2021-2022.

Reducing Construction Costs: As we reviewed the construction costs over the last year, it was apparent the contractors are adding in significant risk to their bid prices. In December of 2020 we engaged our contractors with a survey and followed up in January 2021, with individual workshops, with a select group of contractors. The purpose of the outreach was to identify areas of improvement, efficiencies and risk to help ODOT reduce our overall construction costs. Currently

we are reviewing this data and developing an action plan for implementation of these contract changes. Many of these changes will be implemented on the majority of the 2021-2022 projects.

Contracting Efficiencies: Current efforts to meet the settlement agreement requirements of building and/or updating 7,770 curb ramps by the end of 2022 are utilizing existing STIP projects that trigger the ramp work and standalone ADA ramp projects. Some of the challenges with starting up the program were related to training and the learning curve required to produce compliant ramps with a high rate of success. This learning curve, along with a segmented funding stream have required high numbers of ramps to be constructed in 2020-2022. This compression of schedule has limited ODOT's ability to deviate from traditional contracting methods, due to the risk of production. The additional funding that was approved by the OTC last January provides funding certainty and the ability to look beyond the 2022 deadline. ODOT will be aggressively looking for opportunities to leverage existing STIP and local agency projects, starting in 2022 and 2023. The ADA program has only had opportunity to leverage a small number of local agency projects thus far, but feels there is potential for great savings to the program and will be moving forward with this strategy. ODOT is also developing the use of Design Build contracts for projects starting 2023 and will have the use of Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts starting in 2022. Both of these contracting methods should help bring innovation and efficiencies to this program by allowing design engineers and contractors the ability to work more closely together to construct compliant and cost effective curb ramps. ODOT continues to provide opportunities for the use of small businesses by allowing for smaller project sizes, some of these projects are managed through our Maintenance District offices and the use of the Emerging Small Business program.

The next step will be to develop an action plan for cost reduction items in all three focus areas with an implementation schedule. Some of the items are already underway and as mentioned above will be implemented on the 2021 and 2022 projects. Additionally the ADA program is currently working with ODOT's Internal Audits Unit to evaluate the program and identify process improvement areas to enable the program to be more efficient and aid in the management of risk in the program. The ADA program will also continue collaborating with our accessibility consultant who is a national expert on ADA compliance and has been assisting ODOT in the development of the program. Lastly, ODOT is recommending engaging with the Continuous Improvement Advisory Committee (CIAC), to provide updates on program progress and cost reduction efforts.

Program Funding

In January the OTC allocated \$147 million to the ADA program, these funds will be used to complete the right of way acquisition and construction for projects in 2021-2022. These funds will also be used for the design and right of way acquisition for projects being constructed in 2023, responding to citizen inquiries, and developing a strategy to upgrade our pedestrian signals. An additional \$90 million will be recommended to be added to the ADA program at today's meeting as part of Agenda Item H. These funds will be used for the construction of the ADA projects in 2023 and the design, right of way acquisition, and construction for ADA projects in 2024. This additional funding assumes a cost reduction within the anticipated 30%-40% range and provides the remaining funding necessary to complete the ADA projects and other program requirements for the 2021-2024 STIP. The \$90 million is being proposed to come from COVID-19 relief funding (\$32,189,314) and borrowing against the Fix-It funding in the 2024-2027 STIP (\$57,810,687). The proposed 2024-2027 STIP has the ADA program budgeted for \$170 million which has been reduced by the

anticipated cost reduction of over 30%. ODOT is currently implementing cost reduction measures into existing projects and plans to incorporate additional measures developed in the action plan as they become available over the next couple of months.

Attachments:

- Attachment 1 – *ADA Settlement Agreement*
- Attachment 2 – *2019 ODOT Annual Report*
- Attachment 3 – *2019 Accessibility Consultant Annual Report*

Presentation:

Karen Rowe and Steve Cooley presented the [PowerPoint](#) about reducing costs for ADA projects. They wanted to answer the question that was asked in the discussion at the last Commission meeting which was what is ODOT doing to control costs for ADA ramps. Karen gave an overview of the settlement agreement and what has been completed thus far. Training is a key element for inspectors, contractors, and designers and is a large learning curve. Karen went over the current program challenges and reviewed the agreement milestones and ODOT is on track to meet the deadline. What is being done to help with cost reduction in design such as less ROW to do the work, construction such as adding ramps into existing projects and different contracting methods was reviewed and are hoping to see a 30-40% cost reduction. Karen went over ADA STIP funding for the 21-24 STIP and 24-27 STIP.

Discussion:

Commission Chair Van Brocklin asked about reconstruction costs and what we are doing to reduce those costs. Some of the rebuild cost is built into the construction cost, as the training goes better, and inspectors and contractors are educated those costs should be reduced. It is a learning curve, but numbers are going down. ODOT is also looking at when the inspection is completed and will bring it in earlier, before construction is completed. Steve Cooley also commented that we are seeing reductions in the total number of remove and replace costs. Chair Van Brocklin also asked how frequent reconstruction is happening. Steve noted that in the beginning there were a lot of replacements but after 2019, ODOT updated their designs and during the last season the total replacements has went down significantly. Commissioner Brown asked Karen about if ODOT is responsible for the entire right of way (ROW) or if it is done in partnership, referencing the photos in the PowerPoint. Karen explained that part of the ramp requirement is related to the slope percentage and amount of space needed for a wheelchair to turn around. Steve answered on if we are impacting the ROW, permanent or temporary, it is the responsibility of ODOT and has increased costs. Commissioner Smith appreciated streamlining the process and reducing costs but acknowledged it is a learning curve and had a question: When it is discovered that it isn't in compliance, how is it found out, complaints or follow-up checks? Steve answered that during construction we have staff sampling projects to ensure the work is being done completed. After construction is completed, it can be the accessibility consultant making the review or the plaintiff going out and reviewing the work. Commissioner Smith thought it would be good to have a quality check over time to check compliance and how long the work is lasting. Chair Van Brocklin agreed that follow-up would be great, even a mailing, and would be best to be proactive. Cooper Brown also commented on the points that Chair Van Brocklin brought to the table and want to make sure there's access to all of our system by all users and that we are going above and beyond the agreement requirements. Cooper also said that imperial data to provide a rough percentage of reconstruction that has been done can be

gathered and shared, but Chair Van Brocklin didn't want to look at the past and a high level of information currently works. Chair Van Brocklin also mentioned that there's time to get community outreach right. Steve Cooley then responded letting him know that there is currently a community outreach program and is it assessed annually. Karen went over her closing statements and mentioned that we are partnering with local entities to make sure ramps are being updated in those projects as well. Karen thought that a more detailed report out could be brought to CIAC and Chair agreed, with a synthesized update to the Commission.

Action:

None taken.

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COVID-19 Relief Funding Package
Item H

The Commission was requested to approve ODOT's proposal for allocating funding from the federal COVID-19 relief funding package.

Background:

The COVID-19 relief funding package approved by Congress in December 2020 includes \$10 billion in highway funding for relief to state DOTs and local governments who have lost revenue as a result of the pandemic and recession. Oregon will receive \$124 million in highway funding.

The package also includes an additional \$225 million for transit in Oregon, on top of the funding provided under the CARES Act earlier in 2020. ODOT will receive \$2.8 million for rural transit providers, with most funding going directly to the large urban transit providers. Additionally, \$4.8 million of the amount provided directly to Amtrak will be credited to the Oregon segment of the Cascades Corridor passenger rail service.

ODOT projects the State Highway Fund will lose \$225 million through the end of state FY 2021 and \$370 million through FY 2025 due to the pandemic and recession. This loss will largely hit the agency's operations and maintenance funding, as most project funding is provided through federal highway formula funds and bond proceeds that have not been impacted.

The federal COVID-19 relief funding for highways is available for traditional federal-aid eligible capital projects as well as maintenance, operations, and administrative expenses, including salaries of employees, information technology needs, and other purposes. The funding does not require a non-federal match. Funding is suballocated by formula to the state's three large metropolitan planning organizations, providing a total of \$16.1 million to Portland, Salem/Keizer, and Eugene/Springfield. Funding is available for obligation until September 30, 2024.

Proposed Allocation

Based on these principles and goals, ODOT developed the following recommended funding allocation.

Local Government Funding: \$55,791,257

ODOT proposes providing local governments a total of 45% of the COVID-19 relief funding in proportion to their share of the State Highway Fund revenue. This includes the following:

- \$16,110,809 suballocated by federal statute for the large metropolitan planning organizations (MPOs)—Portland Metro, Salem-Keizer, and Eugene-Springfield;
- \$38,828,628 to cities, counties, and small MPOs in general accordance with the ODOT/AOC/LOC federal fund sharing agreement. Of this amount, \$22,454,595 will go to counties; cities over 5,000 outside an MPO will receive \$8,125,036; small MPOs will receive \$6,948,997 and \$1,300,000 will be set aside for cities under 5,000 through the Small City Allotment program, which offers grants for specific projects. Local funding would be directed toward operations and maintenance costs to the maximum extent possible, with the exception of the funding for small cities.
- \$577,698 for the Port of Hood River to compensate for lost toll revenue that would have been invested in the Hood River Bridge.
- \$274,122 for the Port of Cascade Locks to compensate for lost toll revenue that would have been invested in the Bridge of the Gods.

State Highway Operations and Maintenance (O&M): \$36,000,000

This funding will be applied to operations and maintenance to reduce ODOT’s \$200 million operational budget shortfall through 2027 and reduce the impact of reductions to operations and maintenance programs in the 2021-2023 budget.

ADA Curb Ramps on State Highways: \$32,189,314

This funding will cover part of the remaining \$90 million need for ADA compliant curb ramps in the 2021-2024 STIP in order to address equity and access for Oregonians with disabilities. Using COVID-19 relief funds reduces the need to borrow against Fix-It funds in the 2024-2027 STIP. The remainder of the need will be requested as part of the amendment in the 2021-2024 STIP amendment.

Attachments:

- Attachment 1 – *Integrated COVID-19 Relief and 21-24 STIP Funding*

Presentation:

Travis Brouwer gave a brief summary of the changes in the COVID-19 relief package plan. Karyn Criswell started the presentation and went over the [PowerPoint](#) on the breakdown of fund allocations. Travis continued the presentation and discussed the state highway fund forecast and that it is projected that we will lose about 7% (\$225 million) due to the pandemic and recession. That loss will be shared between ODOT, cities and counties. Within ODOT it hits the operations budget the most, where there has been a large structural budget deficit that has been exacerbated due to COVID-19. ODOT worked with AOC and LOC on how to distribute the funding using the existing federal funding share agreement percentages. The 45% to local agencies would be broken into three parts, totaling \$55.8 million. For ODOT, they are requesting \$36 million to operations & maintenance to offset the reduced revenue that is a result of COVID-19 and last summer’s wildfires, usually federal dollars aren’t eligible for these costs. ODOT is working through each Division’s

budget plan that will include a 6% reduction in state highway fund dollars. Final recommendation is for ADA curb ramps in the amount of \$32.2 million. They will be asking for the remaining funding in the 21-24 STIP, which is the next agenda item. In developing the 21-24 STIP, part of the funds for ADA curb ramps were borrowed against fix-it funds in the 24-27 STIP which could be reduced. Even with the money from congress, it is only making up for about 55% of lost funds due to COVID-19. We will still be short about \$58 million dollars and local governments will be short as well.

Discussion:

Commissioner Brown asked if there would be a distribution chart to show how the money will be split up. Travis said they should be able to share it by the end of the week if the Commission approves, they didn't want to give out funding numbers that could be changed. It will be shared with cities and counties through their AOC and LOC staff. Commissioner Smith thanked the team for making changes to the original COVID-19 relief funds and trying to be fair. Chair Van Brocklin echoed Commissioner Smith's comment and that it was the right decision for this occasion.

Action:

Commissioner Smith moved and Commissioner Brown seconded to approve the allocation of COVID-19 relief funds as presented totaling \$124 million. Commission members Vice Chair Simpson, Brown, Smith, and Chair Van Brocklin unanimously approved the motion.

The Commission recessed for lunch at 12:10pm and convened at 12:40pm.

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***2021-2024 Statewide Transportation Improvement Program Update
Item I***

The Commission was requested to approve updated funding in the 2021-2024 Statewide Transportation Improvement Program (STIP).

Background:

In December 2017, the Commission approved the funding allocation for the 2021-2024 STIP. When the Commission took this action, the scheduled expiration of the FAST Act on September 30, 2020 - the day before the new STIP began - created significant funding uncertainty for federal funding levels in the STIP. As a result, the Commission's funding allocation assumed a reduction of about 10 percent in federal highway formula funding available to ODOT for 2021 through 2024. This assumption mirrors experience of reduced funding after the surface transportation act's expiration in 2009. This approach is also a prudent risk mitigation strategy to avoid the pain of cutting projects.

During the STIP funding allocation process in 2017, ODOT worked with the Commission on a plan to obligate federal funding that came in over and above the assumed level. The Commission provided initial direction to ODOT to set aside the first \$40 million in additional federal funding for a Strategic Investments Program that would allow the Commission to target funding to high priority

needs on the state highway system. The Commission also directed that any additional federal funding available after funding this Strategic Investments Program would go to Fix-It projects.

Congress recently passed a one-year extension of the FAST Act through federal fiscal year 2021 and provided additional funding for the Highway Trust Fund to ensure solvency for that period. This extension provided funding at a level below what Oregon received for FY 2020 but approximately \$20 million above the level assumed in the STIP. However, this action still leaves ODOT with significant uncertainty about federal funding levels in 2022 through 2024, particularly given that the Highway Trust Fund will exhaust its balances again in about a year.

ODOT's October 2020 revenue forecast also provides a clearer picture of State Highway Fund dollars available to the 2021-2024 STIP. While COVID-19 and the recession have significantly reduced overall State Highway Fund resources, debt service over the next several years for repaying HB 2017 project bonds came in well below initial estimates developed in 2017, providing some additional resources for the STIP.

Additional Available Funding

Given all of this, ODOT proposes the following updates to funding levels built into the 2021-2024 STIP.

- Assume that current federal funding continues at the federal FY 2021 level through 2024. This will provide approximately \$80 million in additional federal funding to allocate over the four years of the STIP.
- Given consistently high levels of annual federal highway redistribution funding that has come in over and above ODOT's assumptions, build an additional \$20 million in annual redistribution funding into the STIP. This will allow ODOT to address critical needs now in a more comprehensive and strategic manner rather than programming funds each year with limited lead time. Over the four years of the STIP, this will provide an additional \$80 million in funding to allocate.
- Add \$7 million in special one-time federal highway funding that Congress appropriated in FY 2021 above the authorized FAST Act funding level.
- Add \$47 million in HB 2017 funds to the STIP to reflect lower debt service costs than estimated in 2017.

All told, these changes lead to \$214 million in additional funding to program in the 2021-2024 STIP. Of this additional available funding, the Commission approved \$147 million in January for ADA ramps, leaving \$67 million in additional available resources to allocate in March.

Taking this action would amount to fully allocating all reasonably anticipated federal funds for the next four years. This would leave no unallocated resources to meet any additional needs; the primary means of meeting additional needs would be through canceling or delaying projects and reallocating funds. Canceling or delaying projects might be necessary if federal funding falls below current levels, which remains a risk.

Critical Needs

ODOT has identified the following critical needs to be addressed during the course of this STIP. All of these projects are required based on direction from the Legislature, Governor, or a legal requirement, or are critical to wildfire recovery or implementation of the Strategic Action Plan.

Project/Program	Description	Amount
Tolling Development and Implementation	Fund NEPA and system development through 2022	\$60,000,000
Interstate Bridge Replacement Program	Fund program development through 2024	\$30,000,000
ADA 2023-2024 Projects	Construct ADA projects through remainder of 2021-2024 STIP	\$57,810,687
OR 99 Coleman Creek – Glenwood	Add shoulders/bike lanes, safe crossings, transit stops, and sidewalks for a mile along OR99	\$8,000,000
I-5 Boone Bridge	Fund portion of project development through 2023	\$3,700,000
Multimodal Corridor Network	Funds SAP multimodal network definition and funding prioritization work through 2023	\$650,000
Total		\$160,160,687

As noted above, in January the OTC allocated \$147 million to ADA curb ramps for projects in 2021-2022. In addition, ODOT proposes to program \$32,189,314 for ADA ramps from COVID-19 relief funding. The amount listed above for ADA is the additional amount needed for projects in 2023-2024 beyond the amount already allocated in January and proposed from the COVID-19 relief funding.

The critical needs listed above exceed the additional available resources by \$93,160,687. In order to balance the STIP, ODOT proposes borrowing against Fix-It funding in the 2024-2027 STIP. To mitigate this impact, ODOT proposes that any additional federal funding that comes in over and above the projected level during the 2021-2024 STIP go first to reducing this shortfall to reduce the amount borrowed from the Fix-It program in the 2024-2027 STIP. As any additional unallocated funding comes in, ODOT would automatically reduce the amount borrowed from the STIP in 2024-2027 and increase the amount available for Fix-It projects.

Tolling Development and Implementation: \$60,000,000

With direction from the Legislature in HB 2017, ODOT is developing plans for congestion priced tolling on I-5 and I-205 to pay for congestion relief projects and help manage demand. Ongoing tolling development and implementation—including NEPA and developing tolling systems—requires additional funding. An infusion of \$60 million should cover program costs through 2022, though additional funds may be necessary depending on the scope and pace of tolling implementation. Additional funds will be needed to implement tolling; ODOT plans to secure these resources by borrowing against future toll revenues.

Interstate Bridge Replacement Program: \$30,000,000

The Interstate 5 Bridge over the Columbia River is a major bottleneck for all modes of transportation traveling across the river, as well as a significant seismic vulnerability. As directed by Governor Kate Brown and Governor Jay Inslee, ODOT and the Washington State Department of Transportation (WSDOT) have re-established replacing the bridge as a priority. The two states have hired a program administrator, developed a collaboration process with local partner agencies and selected a general engineering consultant. The Washington Legislature has dedicated \$35 million to the project, and the Commission has dedicated \$15 million in Oregon funding to date. ODOT will need to contribute an additional \$30 million through this STIP cycle, which should get the project close to completing program development work.

ADA Curb Ramps: \$57,810,687

ODOT reached a settlement agreement with the Association of Centers for Independent Living in March of 2017 in which ODOT agreed to change practices related to compliance with the Americans with Disabilities Act (ADA). ODOT needs to provide funding to build a substantial number of curb ramps over a fifteen year duration, with three milestone requirements. With all of the current ADA Program funds allocated, additional funding is required through 2024 to continue curb ramp construction projects, scope pedestrian activated signals, and support various program-related activities to meet the settlement agreement. While ODOT estimates the additional funds for projects in 2023 through 2024 will cost more than the amount requested, the agency is implementing measures to reduce these costs, which has been applied to the request. If these savings cannot be achieved, additional funding may be necessary.

OR99: Coleman Creek – Glenwood: \$8,000,000

This project is north of Phoenix in unincorporated Jackson County on OR99, central to the area that experienced massive destruction from the Almeda fire in September 2020. The project was under design approximately two years ago when it was cancelled due to insufficient funding to take it to construction. The project will upgrade OR99 from the north terminus of Coleman Creek culvert to Glenwood Road by widening for sidewalks and bike lanes, building three improved pedestrian crossings, and rebuilding six bus stops. Region 3 has allocated \$2.5 million to the project, and Safe Routes to School (SRTS) Infrastructure and Sidewalk Improvement Program funds have already brought \$2.67 million to the corridor. Rogue Valley Transportation District is a strong partner and has applied for \$1 million of Statewide Transportation Improvement Funds (STIF) Discretionary grant funds to support bus stops and sidewalk infill, and an additional SRTS Rapid Response grant is likely to bring an additional \$833,000 to the table. Including this STIP amendment, the total funding currently allocated to the project is \$13,170,000. STIF and SRTS funding currently being requested would bring the total cost to \$15 million; if this STIF and SRTS funding is not secured, the project's scope will be reduced. The project is in design now and expected to go to bid in 2023.

I-5 Boone Bridge: \$3,700,000

The Interstate 5 Boone Bridge over the Willamette River is a crucial link on one of Oregon's critical seismic lifeline routes that connects the Portland metro area to the Mid-Willamette Valley and areas to the south. The Boone Bridge, which is over 60 years old and has been widened and modified over time, will require replacement to withstand a Cascadia Subduction Zone quake and enable I-5 to continue to serve as a primary West Coast route for passenger and freight movement. As directed by House Bill 5050, ODOT completed a study of the best approach to widen and accomplish seismic

resiliency of the bridge. In winter 2020 ODOT delivered a report and recommendation to the State Legislature recommending bridge replacement and operational and safety improvements on I-5. To advance the planning and design of this project ODOT will need to contribute \$3.7 million through this STIP cycle, which should get the project close to completing program development and NEPA work.

Multimodal Corridor Network: \$650,000

The identified Strategic Action Plan outcome of improved access to active and public transportation requires implementing actions to be carried out during the 2021-23 biennium. These actions include developing a baseline understanding of funding currently dedicated to walking, biking and transit; developing and implementing a funding prioritization process of existing pedestrian, bike and transit investments to improve access for marginalized communities; and defining a priority multimodal network to enable more strategic and equitable selection of future projects and programs. Both consultant and project management resources at an estimated cost of \$650,000 are needed to move these actions forward while continuing core division work to fund active and public transportation services and provide technical assistance to external agencies implementing and delivering projects.

Attachments:

- Attachment 1 – *Integrated COVID-19 Relief and 21-24 STIP Funding*

Presentation:

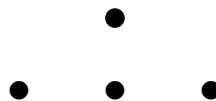
Travis Brouwer introduced the [PowerPoint](#) on the 2021-2024 STIP amendment request. Cooper Brown reviewed the six proposed items that are being brought forward. The proposed investments are \$60 million for Tolling Development and Implementation, \$30 million Interstate Bridge Replacement Program (Washington has contributed \$35 million) to get the program through completion of program development, \$57.8 million for ADA Curb Ramps, \$8 million for OR 99 in Phoenix, \$3.7 million for I-5 Boone Bridge and \$650,000 for Multimodal Corridor Network.

Discussion:

No questions were asked by the Commission. Chair Van Brocklin noted that these areas will be money well spent.

Action:

Commission Vice Chair Simpson moved and Commissioner Brown seconded to approve the proposed 21-24 STIP update in the presentation. Commission members Smith, Brown, Vice Chair Simpson, and Chair Van Brocklin unanimously approved the motion.



***2024-2027 Statewide Transportation Improvement Program Program-Level Funding Allocations
Agenda Item J***

The Commission reviewed ODOT’s proposal for the 2024-2027 STIP.

Background:

Over the last several months, ODOT has worked with the Commission on the allocation of funding for the 2024-2027 STIP. In December, the OTC allocated funding among broad categories as shown below.

Category	Amount
Fix-it*	\$800,000,000
Enhance Highway	\$175,000,000
Safety	\$147,000,000
Public & Active Transportation	\$255,000,000
Local Program	\$404,500,000
ADA Curb Ramps	\$170,000,000
Other Functions	\$161,410,568
Total	\$2,112,910,568

*After factoring in borrowing \$120 million to cover ADA projects in 2021-2024 STIP.

Enhance Highway Discretionary Program

The Enhance Highway funding included \$110 million for projects named by the Legislature in HB 2017 with the remaining \$65 million available for an Enhance Highway discretionary program. Because no funding is available in other categories to specifically address congestion and freight mobility needs on state highways, ODOT recommends that this limited funding focus on filling this gap in order to address road limitations that can impact ODOT’s economy.

Based on feedback from the Commission in January, ODOT has developed a proposal for how to allocate this funding. As described in the attached document, ODOT would use a competitive statewide process to fund projects including auxiliary lanes, truck climbing lanes, passing lanes, freight improvements, interchange improvements, intelligent transportation systems and other technology improvements, among others.

ODOT would factor in project benefits in terms of safety, equity, climate, and multimodal accessibility to ensure alignment with priorities in the Strategic Action Plan. ODOT would engage Area Commissions on Transportation on priority projects and ask ACTs for feedback on a proposed project list before bringing the final list before the Commission. ODOT recommends funding the best projects across the state while setting aside a minimum of 30% for projects in rural areas outside metropolitan planning organization boundaries and also setting a goal of distributing projects across the state.

ODOT is seeking Commission input and feedback on the general direction of the Enhance Program strategy as shown in the attachment. ODOT will share the final program details with the Commission before launching the project solicitation. The final project selection will be part of the 24-27 STIP that is approved by the Commission.

Attachments:

- Attachment 1 – *Enhance Highway Discretionary Program*

Presentation:

Travis Brouwer started the conversation with a summary of what was discussed previously with the Commission. Karen Rowe presented the [PowerPoint](#) to go over the Enhance Highway Program

proposal. The project types are at a conceptual level because it takes about two years to identify projects. In addition to geographical balance, they need to check with their MPOs and ACTs, it is currently a framework and will create the process once the Commission agrees with the proposal.

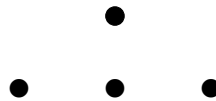
Discussion:

Vice Chair Simpson asked Karen to explain truck parking for the public. Karen then answered the questioned mentioning it could be part of ITS. Truck parking is meant to be near the interstate for when we close the interstate due to storms or accidents. Travis Brouwer added that with new hours service regulations there is need for truckers to have places to park when they've reached the end of their day. Currently when there's no places for them to park they park along side of the freeway which isn't always safe for the public. They are currently working with Western States on partnering with information systems, such as phone applications, in hopes to share those locations electronically with truck drivers.

Chair Van Brocklin agreed with the splits and it seems to be thought through. There was no objections to this approach. The final program guidance will be shared with the Commission before it goes out.

Action:

None taken.



***Refocus of Area Commissions on Transportation (ACTs) and discussion with ACT Members
Agenda Item K***

The Commission reviewed the updated refocusing of the Area Commissions on Transportation activities in support of the Commission and ODOT and was asked for feedback.

Background:

The Commission heard a presentation on ACT engagement and were provided a report at their December meeting summarizing both the current role of the ACTs, as well as some initial recommendations on how to move forward (Attachment 1). The Commission directed staff to meet with each of the ACTs to share these draft recommendations and get ACT feedback.

Jerri Bohard, former Division Administrator for Policy, Data and Analysis, provided a presentation to the majority of the ACTs in collaboration with region staff who represent the agency and provide support with each ACT. All ACT members were provided the report given to the Commission as well as the Strategic Action Plan overview materials. While the conversations with the ACTs varied, they were framed around three key areas: (1) diversity of membership on the ACTs and what might need to change to meet the needs of their area from an Equity standpoint; (2) what areas of the Strategic Action Plan did they believe most benefitted from ACT engagement, and (3) how can Commission/ACT communications be improved. The following is a list of the key themes heard during those discussions, though generalized and not specific to any one ACT.

A. Equity

- a. Most ACT members believe they have a good understanding of the diversity/demographics of communities, and those that see a need to augment their membership are not sure how. They want a clear and relatable definition of equity;
- b. Many ACT members also identified specific membership areas such as freight, the elderly, and the disabled;
- c. They recognize Equity is a challenge, as an area can go from urban to agriculture and everything in between. This includes for any given ACT, perspectives of both social and economic equity;
- d. They expressed concerns over the ability to ensure newly invited individual members would have enough incentive or capacity to continue attending meetings; and
- e. Many see the work of completing *Area Strategies* as a way to address Equity needs – such as addressing needs to make the system accessible to all.

B. Agency Initiatives

- a. ACT members recognized that one of the key roles of their efforts was the importance of collaboration, not only among ACT members, but agency (region) representatives. This includes local initiatives, transportation projects undertaken by the region, and any other transportation related or operational initiatives or efforts that benefitted from a discussion and awareness at the ACT table;
- b. They do believe that many of the initiatives in the SAP could benefit from ACT input and participation, including any efforts that had a statewide impact;
- c. They expressed that awareness of any and all funding programs that support transportation would be important for the ACTs to understand;
- d. They are interested in having a better understanding of needs across the system, the impact of those needs, and how they differ, whether within parts of the ACT, across ACTs, or across the state.
- e. They wish to continue to engage in STIP development, throughout the process, and to gain a better understanding of final directions envisioned, and opportunities for coordination and collaboration; and
- f. They wish to continue or expand on weighing in on all transportation programs, plan updates, and major/mega projects (e.g., Rose Quarter, I-5 Bridge Replacement) around the state, for all modes of transportation, supported by the OTC and ODOT.

C. Communication

- a. ACT members are recognizing the benefits of technology and how it could help with engagement, not only with the public they represent, and membership, but sharing of information on efforts that the agency is engaging in; as well as a way that they hope the OTC or OTC members could engage on a more regular basis with the ACTs and ACT members.
- b. They would like to see regularly scheduled engagement with the OTC or Agency leadership; and would like to see a regular statewide gathering of ACT Chairs;
- c. They suggest that more ACT members should be represented in statewide committees and task forces; and
- d. They are interested in seeing a clear and consistent feedback loop established as decisions are made or being considered, helping them to understand the impact of their recommendations.

Next Steps and Recommendations:

Based on this ACT input, see Attachment 2 for revised recommendations. Pending OTC direction, the agency anticipates bringing back a finalized work plan in May.

Attachments:

- Attachment 1 – *ODOT's ACT Reset Recommendations Report (from December 01, 2020 meeting)*
- Attachment 2 – *ODOT's ACT Refocus Recommendations*

Presentation:

Cooper Brown gave a brief summary of what had been discussed with the Commission previously and that they want concurrence from the Commission that they are moving in the right direction. Jerri Bohard presented the [PowerPoint](#) with the ACT refocus discussions. Equity, ACT engagement, and communication were themes that Jerri heard. They recognized they need younger members on the ACT. There is a lot of interest in statewide initiatives. There was a lot of discussion on the benefit of technology to help with communications and want to see regular communication from the Director's office. They want a better understanding of why decisions are made by having feedback and including ACT members on advisory committees. Recommendations are ACT engagement Areas, Coordination and Communication with the ACTs, and Internal ODOT Improvements. They want to engage in equity, SAP, STIP, and area strategies. Coordination and Communication include: Commission liaison, annual virtual meeting, biannual in-person meeting, statewide gathering of ACT chairs, and collaboration of Region staff. They see a lot of value in meeting with their peers. Gary Farnsworth continued the conversation and noted his involvement with ACTs when he was an area manager and there was no hesitation to tie the area managers to the area commissions because the relationships that occur and the importance of it. It is being reinforced as a recommendation because he believes we can expand how we connect with the region and areas managers to other key people in the agency. Jerri continued the presentation. They are recommending a statewide coordinator to bring everything together. There would be beneficial for a communications liaison with a calendar of when the meetings are. Jerry believes there's a need to go back to the public and remind them about the ACTs since they've been around since 1995. Lindsay Baker is supportive of going back to the public and sharing information about the ACTs. Gary also added that, as a previous ACT member, he sees the benefit of keeping things organized by having a coordinator by helping keep things enforced and on track.

Discussion:

They will review feedback from the Commission and bring back a work plan as a consent item at the May OTC meeting. Chair Van Brocklin confirmed that ODOT is looking for feedback from the Commission at this time. He sees the ACTs as being very valuable in a critical communications mechanism. Communication has a local government overlay to it that you can see across the state. The pandemic and natural disasters have not been good for this program or communication broadly, due to reduced in-person communication. He believes we need to connect partners across the state; it is about getting information out, how we see the world today, and moving forward with the changing environment. Chair Van Brocklin wants to make sure it is useful to the people we are asking to be involved, since they are volunteers. It should be mutually beneficial and embrace where we are going while moving the agenda forward. Commissioner Brown believed the recommendations that are being made is what is being heard on the ground. To be successful as a state, even earmarking,

their needs to buy-in with the ACTs across the state. If the constituents understand how it impacts them and they can see the big picture, you will see embracement and letters of support. She mentioned that she told the ACTs the importance of prioritizing a list of shovel ready projects; with that we could move competitively in a grant situation across the state, not just the Portland area. Commissioner Brown agreed with the need to have a coordinator, but does not have the capacity to do it, but can attend the meetings and participate. Chair Van Brocklin agreed with Commissioner Brown’s statement about buy-in. He noted that prioritizations will probably shift, but it would be great to have a list and know what is important to the different ACTs. Commissioner Smith thanked Jerri for lending her expertise and Gary for helping with the efforts because of his long history with the ACTs. She agreed with the approach/plan and agreed that communication is integral to making this work. We have learned that we can communicate in-person and reach more people with no travel time. She believes that it is critical that someone at the agency executive level oversees this project so that it doesn’t get lost and it needs to have an agency level of importance as well as a high level of importance at the Commission. The Commission needs to commit to the ACT chairs and ACTs because they are volunteers and we need them to understand their importance. Vice Chair Simpson agreed with Commissioner Smith’s point of keeping OTC engaged with the ACTs and Jerri’s work with the ACTs. He knows the importance of going on the “road show” and seeing the ACTs and being face to face. Interactions will still be important and it needs to be continued, not just using technological devices, once it is safe to do so. Chair Van Brocklin echoed everyone’s comments about Jerri’s work with the ACTs and noted the importance of having the Commission meetings across the state and the valuable connections that are built with having the meetings in person. The Commission needs to make sure that the same message is being said across the state and that they are cohesive. He thinks it is really important to understand the regionalization, localization, and statewide priorities while keeping a common approach. There are a lot of changes happening within the agency, state, and world and he is excited to see what this looks like and working on it together. Cooper appreciated the feedback, it is very helpful. He proposed that they come back in May with tangible actions based off of the comments. He is thinking about ACTs in a broader way than initially, there is a real benefit to have connections at a staff level and between the ACTs. Cooper also noted, to Commissioner Brown’s point, the importance of keeping the ACTs across the state connected and aware of priorities. He noted that it has become evident that there needs to be structure to make sure everything gets done, but not just by one person within ODOT. Jerri agreed that the Commissioner’s comments align with what the ACTs are saying and that it will be fun to work on this during its next stage. Gary agreed that this process is mutually beneficial and it is important for us to communicate well, that communication is multi-way, and continuing to build trust is the foundation.

Action:

None taken.

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***Continuous Improvement Advisory Committee (CIAC) Update
Agenda Item L***

The Commission was asked to review and approve revisions to the CIAC Charter and membership list and provide recommendations on how to leverage the CIAC moving forward post Oregon Department of Transportation (ODOT) Strategic Action Plan (SAP) adoption.

Background:

Created by the Oregon Legislature as part of Keep Oregon Moving (HB 2017), the CIAC advises the Oregon Transportation Commission on ways to improve ODOT. CIAC recommendations inform required Commission reporting to the Oregon Legislature. The committee was established in March of 2018 and the OTC approved the group's original charter.

CIAC members serve two-year terms and are eligible for two consecutive terms. Term renewal was due March 2020 and postponed to March 2021 due to COVID-19.

In order to focus on ODOT's SAP priority and goals for social equity, climate, and funding, it is recommended that the CIAC change its membership to increase its expertise in these areas and fill vacant positions. (Attachment 1). These committee focal areas will be in addition to the charges put forth in HB 2017, namely helping develop agency Key Performance Measures, reviewing projects of greater than \$50 million dollars, and assisting the agency to make operational efficiencies. Based on these focal areas, staff have developed a draft 2021 CIAC agenda (Attachment 2).

Next Steps:

Upon OTC approval of proposed member changes, ODOT CIAC staff will schedule meetings and CIAC members will revise the committee's work plan, which will be brought back to the OTC for approval.

Attachments:

- Attachment 1 – *Proposed CIAC Members*
- Attachment 2 – *CIAC Draft 2021 Meeting Calendar*

Presentation:

Cooper Brown presented the [PowerPoint](#) on the CIAC updates. We are at a moment of changes to our organization and with the development of the Strategic Action Plan, the Agency needs to look at how CIAC is used, which was established from HB2017. Commissioner Smith is the Chair of the committee. They want the committee to have a great impact with the Commission and the Agency. Cooper went over the history of CIAC and the proposed focus areas. While following HB2017, they want to be a resource for ODOT and the Commission with the aggressive goals of the SAP. They proposed to shrink core membership and instead bring subject matter experts as needed. They also want to increase the meeting frequency to monthly with a narrowed focus. Commissioner Smith added that there were conversations with external CIAC members and incorporated their feedback to the restructure of more frequent meetings. They are trying to build on the work that was done earlier and accomplish the tasks from HB2017. Not all members are continuing, but they have been asked to be subject matter experts that they can call on when needed.

Discussion:

Commissioner Smith noted that earlier in the meeting it was suggested that CIAC have ADA on the agenda, but at this time they have a lot of items to review and will look to adding it to the agenda in

2022 or 2023. Chair Van Brocklin thanked Cooper and Commissioner Smith on all of their work and evolving the advisory group as things change. There were no comments on the timeline changes. Cooper summarized the membership changes. Chair Van Brocklin thanked the members for their work as they cycle off and he believes the proposed new members are great choices and he supports the slate. Vice Chair Simpson also supports the slate. Commissioner Brown thanked Commissioner Smith for her work on the committee. Chair Van Brocklin added that the work plan for CIAC will be coordinated with the OTC's schedule and topics. Commissioner Smith thanked Cooper for his hard work and great ideas that added to the conversation. Chair Van Brocklin thanked Cooper and Commissioner Smith for their hard work

Action:

Commission Vice Chair Simpson moved and Commissioner Brown seconded to approved the new CIAC roster, to take effect immediately. Commission members Vice Chair Simpson, Brown, Smith and Chair Van Brocklin unanimously approved the motion.

The Commission recessed for break at 2:05pm and convened at 2:15pm.

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Delegation Order
Agenda Item M

The Commission was requested to approve the revised delegation order to add new delegations of authority from the OTC to the Oregon Department of Transportation (ODOT) that better align with OTC expectations of roles and responsibilities.

Background:

At the May 2020 OTC meeting, Commissioners made clear their desire to review the roles and responsibilities of both the Commission and the department to ensure that the Commission has the ability to provide strategic vision and direction to the department and not be bogged down in programmatic decisions more appropriate for ODOT leaders and staff.

Since May, ODOT staff have identified additional delegations that reduce redundancy and align with this Commission direction of placing programmatic and project management decisions with the department. The agency proposes two additions to the existing delegation order (Attachment 1, proposed delegations bolded), as described below.

ODOT anticipates bringing back additional recommended delegations for Commission consideration on a somewhat regular cycle, as they come to light through the agency's many ongoing work efforts.

Recommended Delegations:

State Highway All-Terrain Vehicle Accessibility

In 2017, the Oregon Legislature passed Senate Bill 344, creating a process to designate sections of state highway to be open to ATV use. The process involves Oregon Parks and Recreation Department (OPRD) and Oregon Department of Transportation (ODOT) working with the ATV

Highway Access Advisory Committee to receive applications for sections of highway, review the proposal, and make a recommendation to Oregon Transportation Commission (OTC). Currently, the OTC makes the final decision to designate a section of state highway as open to ATV use. This delegation would allow the ODOT Director (or his delegate) to approve designation of these portions of state highway for ATV use, consistent with the remainder of the process described above.

State Agency Coordination and Approval of Land-Use Compatibility

ORAR 731-015-0075(7), commonly referred to as the State Agency Coordination or SAC rule, requires that the OTC or its designee adopt findings of compatibility with the acknowledged comprehensive plans of affected cities and counties when it grants design approval for a project. The rule requires that the Department obtain all other land use approvals and planning permits prior to construction in addition to requiring that notice of the decision be mailed out to all interested parties.

The Department proposes that the OTC delegate adoption of findings of compatibility with acknowledged comprehensive plans of affected cities and counties to the Director, as described in ORAR 731-015-0075(7), when the project is consistent with a previous OTC-adopted facility plan.

Per ORAR 731-015-0065, which defines the process for approving facility plans, ODOT must involve stakeholders and work with affected local jurisdictions to ensure any facility plan is consistent with both statewide planning goals and applicable acknowledged local comprehensive plans. If conflicts are identified, the department must meet with the local jurisdiction to resolve the conflicts during the facility planning process through options provided in the administrative rule. As part of facility plan adoption, the department evaluates, writes and presents findings of compatibility with both statewide planning goals and local comprehensive plans. These include descriptions of all conflicts that were identified through the process and how they were resolved. Per rule, these facility plans must be reviewed and adopted by the OTC.

Since the OTC will have provided findings of compatibility on any project with an approved facility plan, it is redundant for the Commission to again provide findings of compatibility as part of the State Agency Coordination process. As such, the department recommends the Director be delegated the authority to ensure all SAC requirements are met. Projects with findings that cannot demonstrate prior compliance with an OTC-adopted facility plan would still come to the OTC for review in order to ensure all SAC agreement requirements are met.

Attachments:

Attachment 1 – *Delegation Policy*

Presentation:

Cooper Brown gave a brief summary of delegations that were made in May of 2020. They believe that the new delegation requests reduce redundancy and align with the Commission’s direction to place programmatic and project management decisions with the department. The agency proposed two delegation changes. Cooper noted that they anticipate bringing back additional delegation recommendations for Commission consideration on a somewhat regular cycle, but will bundle them so that they aren’t brought to every meeting. The two proposed delegations are all-terrain vehicle designations and land-use compliance. Cooper went over in 2017 SB344 was passed that designated parts of the State’s highway to be designated for ATV use. Cooper went over the process and noted

that OTC currently makes final determination but believes it makes sense for this approval to be delegated to the Director. Cooper went over the land-use compliance OAR731-015-0075, commonly known as SAC rule. The department proposed that the OTC delegate adoption of finding the compatibility with acknowledged comprehensive plans of affected cities and counties to the Director of ODOT as described in the OAR. When the project is consistent with a previous OTC facility plan, the process for approving them involved ODOT turning to stakeholders and working with affected local jurisdictions to ensure any/all facility plans are consistent with statewide planning goals and applicable local comprehensive plans. If conflicts are identified the agency must meet with local jurisdictions to resolve the conflict during the facility planning process through processes outlined in the OAR. Since the OTC will have provided finding of compatibility with projects that have an approved facility plan, the agency finds it redundant for the Commission to provide findings of compatibility again as part of the SAC process. The department recommends that the Director be delegated authority to ensure all SAC requirements are met. Projects with findings that cannot demonstrate prior compliance with OTC adoption facility plan would still come to the Commission for review to ensure all SAC requirements are met.

Discussion:

Commission Chair Van Brocklin wanted additional information and asked if there's a centralized place that this occurs within the Agency, what is their experience level, and is their capacity to involve a guest from the DOJ so that the findings are good from a legal perspective? Cooper answered that the project teams typically do the work but the legal counterparts are involved to ensure there is compliance. There's a comprehensive internal process to ensure all requirements are met and include DOJ to make sure the agency is in accordance with the law. DOJ was involved in the proposal.

Action:

Commissioner Smith moved and Commissioner Brown seconded the motion to adopt the two delegation order changes. Commission members Smith, Brown, Vice Chair Simpson and Chair Van Brocklin unanimously approved the motion.

●
● ● ●
Consent Items
Agenda Item N

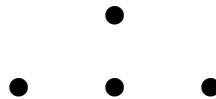
1. Approve the minutes of the January 21, 2021 Commission meeting.
2. Confirm the next two Commission meetings:
 - Thursday, May 13 virtual Commission meeting.
 - Thursday, July 15 virtual Commission meeting.
3. Approve the following Oregon Administrative Rules:
 - a. Adoption of 734-060-0110, 734-060-0120 and the amendment of 734-059-0015, 734-059-0100, 734-059-0200, 734-059-0220, 734-060-0000, 734-060-0105, 734-060-0175, 734-060-0180 relating to the Outdoor Advertising Sign Program. Attachment; rule text

changed after notice was filed.

- b. Temporary adoption of 735-018-0170 and amendment of 735-062-0060, 735-062-0125 relating to online driver license, driver permit and identification card renewals.
 - c. Temporary amendment of 735-046-0010, 735-046-0030 relating to surrender of custom registration plates.
 - d. [Amendment](#) of 734-082-0040 relating to the extension of allowed load length for motor carriers.
 - e. [Amendment](#) of 740-015-0040 relating to online PIN numbers for Oregon Trucking Online.
 - f. [Amendment](#) of 740-100-0010, 740-100-0065, 740-100-0070, 740-100-0080, 740-100-0085, 740-100-0090, 740-100-0100, 740-110-0010 relating to the annual readoption of Federal Motor Carrier Safety Regulations.
- 4. Approve the summary of financial charges incurred by the Director for the fiscal year ended June 30, 2020.
 - 5. Accept the ODOT internal audit report 21-01 on the architectural and engineering (A&E) procurement process.
 - 6. Accept the ODOT internal audit management letter 21-01 on the change in composition of ODOT's liquidated debt between fiscal years 2019 and 2020.
 - 7. Approve the 2020 Oregon Transportation Safety Performance Plan – Annual Evaluation.
 - 8. Request approval to amend the 2021-2024 Statewide Transportation Improvement Program to add a new project, Interstate 84: Cascade Locks-Pendleton and Interstate 82 sign upgrades. The project is in Hood, Wasco, Sherman, Gilliam, Morrow, and Umatilla Counties and is being administered by Region 5. The total estimated cost for this project is \$9,500,000.

Action:

Commissioner Brown moved and Commission Vice Chair Simpson seconded to approve, en bloc, consent items 1-8 as listed. Commission members Brown, Smith, Vice Chair Simpson, and Chair Van Brocklin unanimously approved the motion.



Chair Van Brocklin adjourned the meeting at 2:40 p.m.

Form B. Public engagement and non-discrimination certification for projects submitted to the 10-year regional transportation investment strategy (2018-27 implementation)

2018 Regional Transportation Plan call for projects

Background and purpose

Use of this checklist is intended to ensure sponsors of projects seeking inclusion in the 2018 RTP 10-year investment strategy (implementation in the 2018-27 timeframe):

- *if project development completed*, have performed project level public engagement, including identifying and engaging historically marginalized populations, and analyzed potential inequitable impacts for people of color, people with limited English proficiency and people with low incomes compared to those for other residents
- *if project development not completed*, attest to the intent to perform project level public engagement, including identifying and engaging historically marginalized populations, and analyze potential inequitable impacts for people of color, people with limited English proficiency and people with low income compared to those for other residents.

Use this form (Form B) to certify each project submitted for the 10-year investment strategy (2018-27 implementation).

See also **Form A, Public engagement and non-discrimination certification checklist for transportation system, subarea, topical, modal, and transit service plan or strategy development** for certification of projects not anticipated to be included in the 2018 RTP 10-year investment strategy (implementation in the 2018-27 timeframe) and to seek state or federal funding may be done through a certification of the related local transportation system, subarea, topical, modal or transit service plan or strategy.

Metro is required to comply with federal (USDOT, FTA and FHWA) and state (ODOT) guidance on public engagement and on Title VI of the Civil Rights Act and other civil rights requirements. Documentation of the local actions described below may be requested by regulators; if such a request is unable to be met, the Regional Transportation Plan itself may be found to be out of compliance, requiring regional corrective action.

The completed checklist will aid Metro in its review and evaluation of projects.

Instructions For projects submitted to Metro for consideration for the 2018 RTP 10-year investment strategy, applicants must complete this certification, comprising the project development checklist (section A), summary of non-discriminatory engagement (section B) and certification statement (section C).

Project sponsors should keep referenced records on file in case of a request for information. Records should be retained until the submitted projects have been completed or removed from the Regional Transportation Plan, plus six years. Retained records do not have to be submitted unless requested by Metro, state regulators or federal regulators.

Forward questions regarding this checklist to the Civil Rights program manager, Clifford Higgins at clifford.higgins@oregonmetro.gov or 503-797-1932.

A. Checklist

This part of the checklist is provided in past tense for projects that have completed project development. Parenthetical notes in future tense are provided for applicants that have not completed project development to attest to ongoing and future activities.

- At the beginning of project development, a public engagement plan was (shall be) developed to encourage broad-based, early and continuing opportunity for public involvement.

Retained records: public engagement plan and/or procedures

Yes, we have public engagement plan (attached).

- During project development, a demographic analysis was (shall be) completed for the area potentially affected by the project to understand the locations of communities of color, people with limited English proficiency, people with low income and, to the extent reasonably practicable, people with disabilities, older adults and youth in order to include them in engagement opportunities.

Retained records: summary of or maps illustrating demographic analysis

Yes, we have demographic assessment for PI, analysis for EA (attached).

- Throughout project development, public notices were (shall be) published and requests for input were (shall be) sent in advance of the project start, engagement activity or input opportunity.

Retained records: dated copies of notices (may be included in retained public engagement reports)

Yes. Examples are included in Appendix B of engagement report

- Throughout project development, public documents included (shall include) a statement of non-discrimination (Metro can provide a sample).

Retained records: public documents, including meeting agendas and reports

All public documents include Title VI/ADA statement and are 508 compliant and we will continue to do this.

- Throughout project development, timely and accessible forums for public input were (shall be) provided.

Retained records: descriptions of opportunities for ongoing engagement, descriptions of opportunities for input at key milestones, public meeting records, online or community survey results (may be included in retained public engagement reports)

Yes. Final engagement summary contains this for July 2020-Oct 2020. Website includes EMAC meetings results, newsletters describe ongoing opportunities.

- Throughout project development, appropriate interested and affected groups were (shall be) identified and contact information maintained in order to share project information, updates were (shall be) provided for key decision points, and opportunities to engage and comment were (shall be) provided.

Retained records: list of interested and affected parties, dated copies of communications and notices sent, descriptions of efforts to engage the public, including strategies used to attract interest and obtain initial input, summary of key findings; for announcements sent by mail or email, documented number of persons/groups on mailing list (may be included in retained public engagement reports)

Yes, mailing lists for partner and committee distributions and GovDelivery mailing list is retained. Communications are saved to project SharePoint, database or engagement summary report.

- ❑ Throughout project development, focused efforts were made to engage historically marginalized populations, including people of color, people with limited English proficiency and people with low income, as well as people with disabilities, older adults and youth. Meetings or events were held in accessible locations with access to transit. Language assistance was provided, as needed, such as translation of key materials, use of a telephone language line service to respond to questions or take input in different languages, and interpretation at meetings or events.

Retained records: *description of focused engagement efforts, list of community organizations and/or community members representing diverse populations with whom coordination or consultation occurred, description of language assistance resources and how they were used, dated copies of communications and notices, copies of translated materials, summaries of key findings (may be included in retained public engagement reports)*

Yes, Equitable engagement plan describes activities; engagement summary and engagement evaluation describe effectiveness of these efforts. CBO mailing list is maintained for communications.

- ❑ Throughout – and with an analysis at the end of – project development, consideration was (shall be) given to potential inequitable impacts of the project for people of color, people with limited English proficiency and people with low income compared to those for other residents, as identified through engagement activities.

Retained records: *description of identified populations and information about and analysis of potential inequitable impacts of the project for them in relation to other residents (may be included in retained public engagement reports)*

Yes, comments from marginalized groups are sought and elevated for consideration; impacts analysis is ongoing.

- ❑ There was a finding of inequitable impact for people of color, people with limited English proficiency or people with low income compared to those for other residents. ***Submitted records: for a finding of inequitable impact*, attach analysis, finding and documentation justifying the project and showing there is no less discriminatory alternative.***

*This form uses the term “inequitable impact” to encompass FHWA guidance on disproportionately high and adverse human health or environmental effects and a “benefits and burdens” analysis (see [FHWA Order 6640.23A](#) and the [FHWA Environmental Justice Resource Guide](#)) as well as FTA guidance on disparate impacts on minority populations and disproportionate burdens on low-income populations (see [FTA Circular 4702.1B](#)).

- ❑ Public comments were (shall be) considered throughout project development, and comments received on the staff recommendation were (shall be) compiled, summarized and responded to, as appropriate. **Retained records:** *summary of comments, key findings and changes made to final staff recommendation or adopted plan to reflect public comments (may be included in retained public engagement reports or legislative staff reports)*

Comments to early engagement in summer 2020 were included in final engagement report. There are additional opportunities in Fall 2021 and after the Environmental Assessment is released in spring 2022.

- Adequate notification was (shall be) provided regarding final adoption of the plan, including how to obtain additional detailed information, at least 15 days in advance of adoption. Notice included (shall include) information on providing public testimony.

Retained records: dated copies of the notices; for announcements sent by mail or email, documentation of number of persons/groups on mailing list (may be included in retained public engagement reports or legislative staff reports)

B. Summary of non-discriminatory engagement

Attach a summary (1-2 pages) of the key elements of:

- if project development completed, the public engagement process for this project, including outreach to communities of color, people with limited English proficiency and people with low income
- if project development not completed, the public engagement plan for this project *or* agency public engagement practice, including outreach to communities of color, people with limited English proficiency and people with low income.

C. Certification statement

_____ (agency) certifies the information provided on this checklist is accurate.

As attested by:

(agency manager signature)

(name and title)

(date)



Coordinated Timeline for Proposed I-205 Toll Project Amendments September 2021 to February 2022

This document summarizes key milestones and decisions for consideration of proposed [I-205 Toll Project](#) amendments to the [2018 Regional Transportation Plan](#) (RTP) and the [2021-24 Metropolitan Transportation Improvement Program](#) (MTIP).

- RTP Amendment for I-205 Toll Project is in **blue**
- MTIP Amendment for I-205 Toll Project is in **green**
- Public notices and comment periods are in shaded grey
- Action items (votes) in **bold**

Date	What
Sept. 16	<i>Advance public notice of opening of public comment period for RTP Amendment (published 15 days in advance of public comment period)</i>
Oct. 1	<i>DLCD Form 1 and proposed amendment submitted to DLCD via email</i>
Oct. 1 to Nov. 15	<i>45-day public comment period on proposed RTP amendment for I-205 Toll Project published by Metro at oregonmetro.gov/</i>
Oct. 1	TPAC – Introduce RTP amendment for I-205 Toll Project
Oct. 21	JPACT – Introduce RTP amendment for I-205 Toll Project
Oct. 27	MPAC – Introduce RTP amendment for I-205 Toll Project
Nov. 4	Metro Council (Meeting) – Introduce RTP amendment for I-205 Toll Project <i>Public hearing as part of public comment period/1st Read of Ordinance No. 21-1467 on RTP amendment for I-205 Toll Project</i>
Nov. 15	<i>Close of 45-day public comment period on RTP amendment for I-205 Toll Project</i>
Nov. 17	MTAC – Introduce RTP amendment for I-205 Toll Project and discussion of public comments and draft legislation for proposed RTP amendment
Nov. 30 to Jan. 6	<i>30-day public comment period on proposed MTIP amendment for I-205 Toll Project published by Metro</i>
Dec. 3	TPAC – Discussion of public comments and draft legislation for proposed RTP amendment for I-205 Toll Project TPAC – Introduce MTIP amendment for I-205 Toll Project
Dec. 8	MPAC – Discussion of public comments and draft legislation for proposed RTP Amendment for I-205 Toll Project
Dec. 14	Metro Council (Work Session) – Discussion of public comments and draft legislation for proposed RTP amendment for I-205 Toll Project Metro Council (Work Session) – Introduce MTIP amendment for I-205 Toll Project
Dec. 16	JPACT – Discussion of public comments and draft legislation for proposed RTP amendment for I-205 Toll Project JPACT – Introduce MTIP amendment for I-205 Toll Project

Date	What
Jan. 6	<i>Close of 30-day public comment period on MTIP amendment for I-205 Toll Project</i>
Jan. 7	TPAC – Request action on RTP amendment for I-205 Toll Project TPAC – Request action on MTIP amendment for I-205 Toll Project
Jan. 19	MTAC – Request action on RTP amendment for I-205 Toll Project
Jan. 20	JPACT – Request action on RTP amendment for I-205 Toll Project JPACT – Request action on MTIP amendment for I-205 Toll Project
Jan. 26	MPAC – Request action on RTP amendment for I-205 Toll Project
Feb. 10	Metro Council (Meeting) – Request action on RTP amendment for I-205 Toll Project Metro Council – Request action on MTIP amendment for I-205 Toll Project
Feb. 14	<i>PAPA Adoption Notice with final action submitted to DLCD within 20 days after RTP amendments adopted by the Metro Council; there is an opportunity for appeal period</i>

Affordable Housing Bond Program update

Work Session Topics

Metro Council Work Session
Thursday, November 04, 2021

UPDATE ON AFFORDABLE HOUSING BOND IMPLEMENTATION

Date: Oct. 18, 2021
Department: Planning, Development and
Research
Meeting Date: November 4, 2021

Prepared by: Emily Lieb,
Emily.lieb@oregonmetro.gov
Presenter(s) (if applicable): Patricia
Rojas, Regional Housing Director; Emily
Lieb, Affordable Housing Bond Program
Manager
Length: 45 min

ISSUE STATEMENT

Metro Housing staff will present an update on work underway and proposed next steps to respond to the Affordable Housing Bond (AHB) Community Oversight Committee's recommendations to Metro Council as part of the annual report presentation.

ACTION REQUESTED

Council action will be requested at a future date to approve allocation of Affordable Housing Bond interest earnings through a Work Plan amendment.

IDENTIFIED POLICY OUTCOMES

- Metro Council has awareness of work underway to respond to the Affordable Housing Bond Community Oversight Committee's recommendations to improve program outcomes.
- Metro Council considers potential future action to allocate Affordable Housing Bond interest earnings to improve program outcomes.

POLICY QUESTION(S)

- 1) Does the Metro Council support proposed new regional developer fee guidelines, which are intended to ensure we stay on track to deliver the affordable homes we've promised to voters, advance racial equity and housing opportunity across the region, and make the best use of public dollars?
- 2) Does the Metro Council support the proposed approach to encouraging inclusion of in-unit A/C, as an immediate response to this summer's heatwave and the recognition of the disproportionate impacts of extreme heat events to community members served by affordable housing?
- 3) Does the Metro Council support proposed next steps to allocate Affordable Housing Bond interest earnings to fill financial gaps necessary to support inclusion of A/C in existing pipeline projects that did not initially plan or budget for A/C—after first evaluating other funding options to meet this need?
- 4) Does the Metro Council support the proposal to allocate \$23 million in Affordable Housing Bond interest earnings to support capital investments in permanent

supportive housing to serve up to 175 households experiencing chronic homelessness—in conjunction with Supportive Housing Services funding?

- 5) Does the Metro Council agree with proposed next steps to support local implementation partner jurisdictions in expanding their capacity for equitable contracting and workforce tracking and outcomes?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Below is a summary of key policy considerations related to proposed developer fee guidelines, resilience for future heatwaves, additional investments in permanent supportive housing, and strategies to advance local capacity for achieving equitable contracting and workforce outcomes.

Proposed new regional cash developer fee guidelines

As part of ongoing program improvement and in response to significant changes in the funding landscape, staff are proposing new regional cash developer fee guidelines for all projects receiving Metro Affordable Housing Bond (AHB) funding. The guidelines will help ensure that we stay on track to deliver the affordable homes we've promised to voters, advance racial equity and housing opportunity across the region, and make the best use of public dollars.

These new guidelines respond to feedback from the Housing Oversight Committee and direction from Metro Council to “do more with more,” as well as feedback from partner jurisdictions, developers and Metro’s Auditor regarding lack of transparency and clarity regarding Metro’s approach to project evaluation.

The proposed guidelines are structured to increase regional consistency in cash fees while providing local flexibility to determine where fees fall within reasonably acceptable ranges established by Metro. Specifically, the policy establishes a \$3 million ceiling with percentage-based tiers associated with project size. Different tiered ranges are proposed for acquisition/rehabilitation projects to reflect the fact that acquisition costs are not accounted for in standard developer fee calculation methodologies, and to align with existing state and local policies in place at Oregon Housing and Community Services (OHCS) and Portland Housing Bureau (PHB). Finally, the proposed approach outlines expectations for local implementation partner jurisdictions to provide an explanation of how the specific fee was determined through consideration of specific circumstances of the project, including project scale, complexity and racial equity.

In developing the proposal, Metro staff analyzed existing developer fees across the current Metro housing bond portfolio, researched fee standards in more than 30 other jurisdictions, and evaluated how the developer fee could support desired outcomes for advancing racial equity.

The following considerations informed policy development:

- Staff are proposing a flat-dollar amount ceiling rather than a percentage-based ceiling out of a recognition that percentage-based approaches may over-compensate developers of larger projects.

- Tiered ranges are intended to ensure some level of consistency in developer compensation for similarly sized projects.
- Staff determined that the proposed fee limits are reasonable based on an evaluation of the bell curve of fees in the existing pipeline, the majority of which are under the proposed maximums.
- The proposed approach of broad parameters balances regional accountability and local flexibility for ensuring reasonable and equitable compensation that appropriately responds to variations in project size, complexity, and benefits to marginalized communities.
- The proposed fee guidelines align with existing local and state standards in place at PHB and OHCS.

This is an important policy to support alignment with our values of fiscal stewardship. It's also important to recognize that developer fee guidelines will not address all concerns related to cost efficiency. Local funding solicitations and negotiation processes play an essential role in advancing these outcomes. Beyond developer fee limitations, there are other opportunities to further elevate best practices for fiscal stewardship and racial equity throughout those approaches.

Attached you will find a memo summarizing the proposed guidelines and research and analysis that informed them. See attached *Proposed regional cash developer fee guidelines*.

Supporting climate resilience through local cooling plans and additional gap funds for A/C upgrades in the existing pipeline

This summer's record-breaking temperatures have made it clear that hotter summers are here to stay in the Pacific Northwest, and immediate action is needed to respond. We know that extreme heat poses a particular threat to the vulnerable community members our affordable housing bond investments aim to serve. The Affordable Housing Bond Program is guided by values of advancing racial equity and ensuring sound investments in affordable, high-quality homes.

Because of this public health issue, it is imperative that all affordable housing bond funded projects incorporate some form of in-unit air conditioning (A/C) system moving forward. Metro has requested that local implementation partner jurisdictions work with development partners for existing pipeline projects to incorporate a cooling strategy that includes in-unit A/C, to ensure safety and livability for residents next summer and beyond. (See attached *Metro statement on air conditioning*.) Metro will work with jurisdiction partners to develop a plan to support these strategies, including evaluating the need for additional funding to fill gaps that can't be met through projects' existing financial parameters and other leveraged funding.

Staff are requesting authority to allocate funding from AHB interest earnings to fill financial gaps for A/C upgrades in existing pipeline projects that did not initially plan and budget for A/C, and for which gaps cannot be filled through other sources.

It's important to recognize that each project is at a different place in the development process and one-size-fits-all approaches won't work. A range of solutions will be needed and may include central air conditioning, packaged terminal air conditioners (PTACs), ducted or ductless condenser or heat pump units, window or portable A/C units, hybrid, geothermal, or other emerging technologies.

This is a complex issue at the intersection of public health, racial equity and climate justice. More work is needed to ensure that affordable housing funders, jurisdictions and developers are aligned in supporting climate-smart approaches to cooling, including passive design strategies that reduce the need for air conditioning. There will be opportunities to continue to adapt our approach as time moves forward, but it's important to take action now to avoid costly retrofits in the future.

Allocating \$23 million in AHB interest earnings to invest in additional permanent supportive housing to serve up to 175 households experiencing chronic homelessness

Following passage of the Supportive Housing Services (SHS) measure in 2020, the Metro Council directed staff to seek opportunities to support the integration of AHB and SHS investments. The oversight committees for both funding measures have also expressed strong support for integration and alignment of the two programs, in order to fully realize the potential of these game-changing investments to make a meaningful impact on homelessness.

This additional investment will support Metro's housing program in achieving the outcomes established in both the SHS and AHB policy frameworks, including the Housing Bond's commitment to serve households experiencing homelessness and the SHS measure's commitment to place at least 5,000 chronically homeless households into permanent supportive housing.

Due to strong fiscal management, the AHB has generated significant interest earnings beyond what was initially projected for the program. These funds are subject to the same restrictions as other AHB funds previously allocated through Metro's program work plan. Staff are recommending that Metro Council take action in December to allocate \$23 million from interest earnings to support capital investments for permanent supportive housing is anticipated to serve up to 175 households experiencing chronic homelessness.

Following Council direction, staff will develop an implementation framework for these funds that prioritizes strategies that produce rapid results and produce the greatest impact relative to resources required. Strategies may include "project turnkey" approaches to converting former motels to permanent supportive housing or locally administered NOFAs that braid SHS funding from counties with these additional capital resources from the Affordable Housing Bond.

Providing technical assistance to support local implementation partner jurisdictions in expanding capacity for equitable contracting and workforce tracking and outcomes.

Both the Metro Council and the Community Oversight Committee have expressed the importance of supporting local implementation partners in achieving strong outcomes for equitable contracting and workforce diversity throughout the program, and the Oversight Committee recommended that Metro invest in technical assistance to support these outcomes.

There are limitations in the use of Affordable Housing Bond funds to invest in many of the strategies known to best produce results for workforce diversity, such as upstream investments in pre-apprenticeship programs to support more women and people of color in entering the construction trades. Metro's Construction Careers Pathways program is working to support these strategies in partnership with participating local jurisdictions.

Staff propose to provide up to \$120,000 in funding to reimburse local implementation partners for some of the costs associated with setting up their equitable contracting and workforce diversity tracking systems and capacity. This funding is included in the Affordable Housing Bond program's FY 2021-22 budget. Tracking workforce diversity is an important first step in developing the capacity to advance more robust workforce equity strategies. The data collected from these projects will help build a demographic baseline that will be useful to both the jurisdiction and broader regional efforts.

Additional next steps include:

- Finalizing procedures and reporting tools for jurisdictions to report on contracting (required) and workforce (subset of projects) outcomes to Metro following construction completion.
- Aligning with statewide initiatives to improve equitable contracting outcomes in affordable housing;
- Supporting information-sharing about existing best practices for advancing contracting and workforce outcomes through solicitation requirements/criteria and partnerships with trade associations on program and project basis

STAFF RECOMMENDATIONS

See above.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

In June 2021, the Affordable Housing Bond Community Oversight Committee provided Metro Council with a series of recommendations in conjunction with the program's 2020 annual report. The Oversight Committee's recommendations included:

- ***“Do more with more.”*** *With the region on track to exceed the unit production goals established for the measure, and new resources coming online, we believe there is not only an opportunity, but an imperative, to do more with these resources – whether*

that means going broader to achieve more overall units and/or going deeper to support the most challenging-to-fulfill needs such as permanent supportive housing and larger, family-sized units.

- ***Support integration of Metro supportive housing services funding with affordable housing bond investments*** to ensure that these voter approved funding sources can fulfill their game-changing potential to address the needs of community members who are experiencing or at risk of homelessness.
- We recommend that Metro work with implementing jurisdiction partners to ensure that project investment decisions are being made with an eye toward ***maximizing collective impact of Metro bond and leveraged funds, as well as aligning with complementary investments***, such as digital equity, early learning, and green building.
- We also recommend that Metro ***provide funding and technical assistance to increase the region's capacity to implement permanent supportive housing and equitable workforce strategies.***

Program efforts are also underway to respond to the recommendations provided by the Metro Auditor in February 2021, clarifying procedures for project approval and reporting, addressing gaps in reporting metrics, evaluating and balancing workloads, and improving budget accuracy and transparency.

In the November 2nd work session, staff will provide an update on work underway or proposed to respond to the above recommendations, as well as a broader update on implementation progress. More information about implementation progress is available in the attached *Affordable Housing Bond Quarterly Progress and Financial Report* summarizing progress through end of September.

BACKGROUND

In November 2018, greater Portland's voters took action to address the region's housing crisis, overwhelmingly passing the nation's first regional affordable housing bond, with a goal of creating 3,900 affordable homes across the region, of which at least half (1,950) would be sized for families with two bedrooms or more and 1,600 would be affordable to households with very low incomes.

The Council further directed staff to ensure that four core values, developed and refined through extensive stakeholder engagement in 2018, would guide implementation:

1. **Lead with racial equity.** Ensure that racial equity considerations guide and are integrated throughout all aspects of implementation, including community engagement, project location prioritization, tenant screening and marketing, resident and/or supportive services, and inclusive workforce strategies.
2. **Create opportunity for those in need.** Ensure that program investments serve people currently left behind in the region's housing market, especially: communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement.

3. **Create opportunity throughout the region.** Ensure that investments are distributed across the region to (a) expand affordable housing options in neighborhoods that have not historically included sufficient supply of affordable homes, (b) increase access to transportation, employment, education, nutrition, parks and natural areas, and (c) help prevent displacement in changing neighborhoods where communities of color live today.
4. **Ensure long-term benefits and good use of public dollars.** Provide for community oversight to ensure transparency and accountability in program activities and outcomes. Ensure financially sound investments in affordable, high quality homes. Allow flexibility and efficiency to respond to local needs and opportunities, and to create immediate affordable housing opportunities for those in need.

Since the measure’s passage, Metro Council has taken the following actions to direct implementation of the program:

- Creation and appointment of the **Housing Bond Program Community Oversight Committee**, to provide program oversight on behalf of the Metro Council to ensure the investments achieve regional goals and desired outcomes, and to ensure transparency and accountability throughout implementation;
- Approval of the **Metro Housing Bond Program Work Plan**, which provides an operational framework for the program;
- Approval of four **“Phase I” projects** intended to support early program results while allowing time for broader implementation (two of these projects are scheduled to open in 2021);
- Approval of **local implementation strategies** for all seven of Metro’s local implementation partners, as part of **intergovernmental agreements** which lay out the terms and conditions upon which Metro will provide Metro bond funds to local implementation partners for investment in eligible affordable housing projects; and
- Approval of **Metro’s Site Acquisition Program Implementation Strategy**, through which Metro is working collaboratively with partners to acquire and support development of regionally significant sites.

Recent program updates were previously provided during work sessions in October 2020, March 2021, and June 2021.

ATTACHMENTS

Metro statement on air conditioning

Proposed regional guidelines for cash developer fee

Affordable Housing Bond Quarterly Progress and Financial Report

- Is legislation required for Council action? X Yes “ No
- If yes, is draft legislation attached? “ Yes X No

**Metro Affordable Housing Bond Program
Policy statement on air conditioning***September 14, 2021*

This summer's record-breaking temperatures have made it clear that climate change is not only a challenge for the future. Hotter summers are here to stay in the Pacific Northwest, and immediate action is needed to respond. We know that extreme heat poses a particular threat to the vulnerable community members our affordable housing bond investments aim to serve. We are guided by our values of advancing racial equity and ensuring sound investments in affordable, high-quality homes.

Because of this public health issue, we believe it imperative that all affordable housing bond funded projects incorporate some form of in-unit air conditioning (A/C) system moving forward. We request that local implementation partner jurisdictions work with development partners for existing pipeline projects to incorporate a cooling strategy that includes in-unit A/C to ensure safety and livability for residents next summer and beyond. Metro will work with jurisdiction partners to develop a plan to support these strategies, including evaluating the need for additional funding to fill gaps that can't be met through projects' existing financial parameters and other leveraged funding.

We understand that each project is at a different place in the development process and one-size-fits-all approaches won't work. We anticipate a range of solutions that may include central air conditioning, packaged terminal air conditioners (PTACs), ducted or ductless condenser or heat pump units, window or portable A/C units, hybrid, geothermal, or other emerging technologies. Our goal is to find workable solutions that will keep people safe.

This is a complex issue at the intersection of public health, racial equity and climate justice. More work is needed to ensure that affordable housing funders, jurisdictions and developers are aligned in supporting climate-smart approaches to cooling, including passive design strategies that reduce the need for air conditioning. Moving forward, Metro will look to convene conversations among experts and stakeholders to understand emerging best practices to multi-family design and cooling strategies that balance considerations related to health/safety, livability, sustainability, durability and cost.

Metro Affordable Housing Bond

Proposed regional guidelines for cash developer fee

Draft for partner and key stakeholder review | October 14, 2021

Thanks to voters and many public, private and community partners, Metro's affordable housing bond currently has more than 2,200 affordable homes open, under construction or in the pipeline across the region. That's more than half of our promised goal of 3,900 total homes – with only about 37% of total bond funding spent or committed.

Our bond program is built on guiding principles of racial equity, housing opportunity and good use of public dollars. Transparent reporting and independent oversight help us to improve over time in response to changing market, financing and regulatory conditions, as well as what we're hearing from partners and the community. As part of ongoing program improvement and in response to significant changes in the funding landscape, Metro is proposing new regional guidelines for developer compensation that will help ensure we stay on track to deliver the affordable homes we've promised to voters, advance racial equity and housing opportunity across the region, and make the best use of public dollars. These guidelines will apply to the net cash developer fee for projects submitted for concept endorsement after December 1, 2021; they will not apply to projects submitted for concept endorsement prior to this date.

The purpose of these guidelines is to:

- 1) Increase transparency and clarity regarding Metro's project approval criteria;
- 2) Ensure consistency and fairness in developer compensation across the regional portfolio; and
- 3) Promote alignment of practices with the program's core values, with racial equity at the forefront.

Within affordable housing development, developer fees are essential to fund the costs associated with assembling financing, overseeing design, monitoring construction and occupancy, and supporting community engagement. Developer fees are typically paid to the developer through both a capitalized (or net cash) through project funding sources during the project development period, as well as a deferred fee that is paid with operating cash flow generated by the project over time. The total developer fee, including deferred fee paid over time, is regulated by Oregon Housing and Community Services (OHCS) under its administrative rules for the Low Income Housing Tax Credit (LIHTC) program, a source of leveraged equity in the majority of Metro bond projects. Because the Metro Housing Bond is contributing a significant source of gap funding, our commitment to fiscal stewardship requires that we also examine the appropriate level of net cash fee.

Metro staff review the financial arrangements for each housing bond project. These funding agreements are often complex, involving multiple public and private funding sources, developers, contractors and community partners. We confirm that each project aligns with local and regional goals, and look for trends and opportunities to improve across the program as a whole.

In an analysis of the housing bond portfolio to date for the 2020 annual report, Metro observed a general trend toward higher average fees for for-profit developers and lower average fees for non-profit and culturally specific providers, which points to the need for a policy based on equity considerations in alignment with Metro's guiding principles.

Ultimately, the guidelines Metro is proposing (outlined below) will provide clear parameters intended to increase regional consistency in paid fees while providing flexibility for fees to be locally determined through evaluation of considerations related to project complexity and racial equity. These guidelines

will be revisited and adjusted as necessary to respond to significant changes in the funding, financial or regulatory landscape.

Proposed new regional guidelines for net cash developer fee:

New construction:

- Maximum net cash developer fee¹: Lesser of \$3M or below percentage
- Range (percentage of developer fee basis²)
 - 1-30 units: 8% to 14%
 - 31-75 units: 6% to 10%
 - 76-100 units: 3% to 7%
 - 101 units and above: 2% to 6%

Acquisition/Rehabilitation:

- Maximum net cash developer fee: Lesser of \$3M or below percentage
- \$4,000/unit PLUS (percentage of developer fee basis)³
 - 1-30 units: 13% to 22%
 - 31-75 units: 12% to 20%
 - 76-100 units: 8% to 18%
 - 101 units and above: 5% to 16%

Considerations for determining net cash fee within tiered ranges

Where an individual project falls within the tiered range should be determined through consideration of factors related to the project complexity and considerations related to racial equity, in alignment with the program's guiding principles. Project narratives submitted to Metro must include a description of how the following considerations were taken into account in determining the appropriate fee.

- Project complexity and risk. For example, permanent supportive housing projects typically require additional effort and risk and may warrant a higher fee.
- Degree to which the project team includes nonprofit, culturally specific and/or other community-based organizations and leadership (i.e., demographics of staff and board), and consideration for how organizations are compensated within partnership agreements⁴
- Plans and track record, either directly or in partnership with culturally specific agencies and other groups, of successfully working with BIPOC communities through priority outreach and culturally responsive design and programming
- Plans and track record for achieving fair housing outcomes (e.g., resident demographics for previous projects)
- Plans and track record to achieving equitable contracting and workforce outcomes (e.g., review of contracting/workforce outcomes from previous projects)

¹ Metro defines the net cash developer fee as the net paid fee after the deferred fee and contributed fee/sponsor contributions, consultant fees, and third-party construction management fee.

² Metro defines the developer fee basis as total project cost minus acquisition costs, total developer fee (net cash, contributed, and deferred), consultant fees, third-party construction management fee, and capitalized reserves. This is consistent with the methodology used by Oregon Housing and Community Services (OHCS) and Portland Housing Bureau (PHB).

³ The methodology for acquisition/rehabilitation projects is aligned with OHCS and PHB, and accounts for the fact that acquisition costs are not included in developer fee eligible basis.

⁴ Metro encourages LIPs to consider organization type and diversity of staff/board in determining appropriate fees—recognizing the time and efforts required for community-based and culturally specific organizations to build and sustain the relationships that strengthen equity outcomes throughout the development process.

Background

In its annual report to the Metro Council in May 2021, the Housing Bond Community Oversight Committee identified a need to “do more with more” – calling for more regional coordination to support fiscal stewardship and racial equity outcomes in light of significant changes in the funding landscape that have reduced the size of the “gap” Metro bond funds need to fill to make projects pencil out.

Specifically, federal recovery legislation passed in December 2020 created a “floor” for Low Income Housing Tax Credits (LIHTC), which generate a significant source of leveraged funding for the bond -- resulting in a significant increase in leveraged funding opportunities. Although these opportunities are partially offset by other factors such as construction cost increases, we anticipate that there will be fewer financial constraints in the funding landscape for future projects entering the pipeline.

The Housing Bond Preparedness Audit released in January 2021 recommended that Metro document and disseminate more clear guidance to partners regarding project funding requirements, to ensure transparency and accountability throughout the program. Metro has also heard feedback from partner jurisdictions and developers regarding lack of clarity around expectations, as Metro has shifted its approach to reviewing projects in response to significant unanticipated changes impacting the affordable housing funding system as well as unanticipated circumstances on specific projects.

In the spring, Metro staff initiated a discussion with local implementation partner (LIP) jurisdictions to understand how they were working with developers to adapt projects in response to changes in the funding landscape, including the potential need for a more consistent approach to the developer fee.

In spring/summer 2021, Metro conducted research and analysis to understand existing fee structures in the Affordable Housing Bond portfolio, standards in other jurisdictions, and the potential impact of different approaches, using a racial equity lens. Key findings from this research and analysis are summarized below.

As these proposed guidelines are released in fall 2021, Metro will engage LIPs, the Housing Bond Community Oversight Committee and other key stakeholders to request feedback on the proposed considerations for evaluating paid developer fees and other opportunities to strengthen racial equity outcomes throughout the program. The guidelines will be finalized in early November and will apply to projects submitted for Metro concept endorsement after December 1.

Existing practices and policies

Metro has observed significant variation among developer fees, and most notably, in the portion of the development fee that is capitalized, or paid up front, across the portfolio. Metro observed a general trend toward higher average fees for for-profit developers and lower average fees for non-profit and culturally specific providers, which raised questions about the need for a policy informed by an equity lens consistent with the program’s guiding principles. Additionally, Metro found that fee structures also tended to disproportionately benefit developers of larger projects.

Currently, only one LIP (Portland) has established guidelines for the net cash developer fee. Other jurisdictions have evaluated projects for compliance with OHCS limitations related to the total fee, but have not utilized a cash fee standard. A key theme from conversations with LIPs was the need to ensure adequate fees to compensate development organizations for the work they do—recognizing the importance of developer fees for compensating developers for the work necessary to meet policy expectations related to community engagement, to assemble multiple financing sources, oversee design, monitor construction and occupancy, and report on outcomes.

Metro's guiding principles

Metro's Housing Bond policy framework includes a set of guiding principles informed by stakeholder engagement prior to the referral of the measure to voters. Below is a summary of each of those principles and considerations for how they relate to developer fee standards.

Guiding principle	Considerations
<i>Lead with racial equity.</i>	Provide sufficient compensation to support the continued growth of small, community-based and BIPOC housing providers/partners, and strengthen the ability of all developers/providers to sustain investments that are guided by and support BIPOC communities and other underserved groups.
<i>Create opportunity for those in need.</i>	Ensure that developer fees accurately reflect the level of complexity and risk involved in serving the most vulnerable and incorporating community-informed, culturally responsive design and programming.
<i>Create opportunity throughout the region.</i>	Support fairness and consistency in how developers are compensated across the region; provide level-setting to provide adequate compensation for small projects/developers and cap maximum compensation for larger projects/developers.
<i>Ensure long-term benefits and good use of public dollars.</i>	Ensure fiscal stewardship and appropriate use of public funds to provide long-term benefits to those in need.

Analysis that informed recommendations

Metro staff analyzed existing developer fees across the Metro housing bond pipeline portfolio, researched fee standards in other jurisdictions across the country, and considered and discussed how the developer fee could support desired outcomes for advancing racial equity.

Survey of developer fee standards

Metro completed a survey of developer fee standards from approximately 30 municipalities, including cities, counties, and states. This survey provided a snapshot of the diversity of developer fee standards across the country with an emphasis on paid fee standards.

The goal of the survey was to increase our knowledge of developer fee standards outside of the region and begin to identify themes and best practices among municipalities. For many municipalities, the developer fee was part of their LIHTC underwriting guidelines. While a federal program, developer fee limits are established by states. Given this, there is a fair amount of diversity in fee structures.

We ultimately homed in on practices that 1) most accurately reflected Metro's region and role, and 2) included explicit racial equity goals. In particular, we identified three municipalities that provide the most relevant comparison: Portland, Seattle, and San Francisco. Each municipality provides local gap financing for LIHTC developments and uses a different approach for calculating maximum cash fee.

Comparison of developer fee limits for new construction

	Metro (proposed)	OHCS	Portland	Seattle	San Francisco ⁵
Net cash developer fee limit	Lesser of \$3M or below percentage: 1-30 units: 8-14% 31-75 units: 6-10% 76-100 units: 3-7% 100+ units: 2-6%	No limits	1-30 units: 8-12% 31-75 units: 6-9% 76-100 units: 3-6% 100+ units: 2-5%	Amount under \$1M: 12.0% Amount between \$1 - \$6M: 7.5% Amount between \$6 - \$12M: 5.0% Amount over \$12MM: 2.5%	4% credits: \$2,200,000 dollars, plus \$10,000 per unit for each unit in excess of 100
Total developer fee limit		1-30 units: 20% 31-75 units: 18% 76-100 units: 16% 100+ units: 14%	15%	15%	15%
Notes			More complex projects based on population served, financing and structure are expected to have a paid fee at the top of the range and less complex projects nearer the minimum.	Projects that provide housing and services for homeless individuals and/or families in 75% or more of the units are allowed a higher fee (8%), to balance the lack of opportunity such projects have to generate future income from operations.	Per California's guidelines , for 4% projects with BIPOC developer(s), the 15% total fee limit is increased to 20%, and the \$2.5MM paid fee limit is increased to \$3MM.

In addition to these three municipalities, the recommendations are also informed by a review of existing financial practices that differentiate their fee standards by organization type. These practices include:

- Ohio: The Ohio QAP provides a \$75,000 developer fee supplement for state-certified Community Housing Development Organizations (CHDO).
- California: As mentioned above, the California QAP permits a higher paid fee for 4% LIHTC projects developed by BIPOC sponsors.
- New York: New York State's Small Building Participation Loan Program allows a fee twice as high for non-profits than for-profits (5% vs. 2.5%).

⁵ San Francisco has slightly different limits for 9% LIHTC projects and acquisition/rehab. Because the majority of projects in the housing bond pipeline are 4% projects, only those limits are included here.

Pipeline analysis

In analyzing the existing Housing Bond pipeline, Metro observed a general trend toward higher average fees for for-profit developers and lower average fees for non-profit and culturally specific providers.

Analysis of net cash developer fees in the Metro Affordable Housing Bond portfolio by development team type

Organization type	Average	Percent		Total Dollar Amount	
		Minimum	Maximum	Minimum	Maximum
Non-profit and Public housing authority	6.1%	3.1%	13.0%	\$1,040,650	\$2,950,158
For-Profit and Joint venture ⁶	7.5%	-0.6%	13.4%	-\$223,860	\$5,198,483

Additionally, Metro found that fee structures also tended to disproportionately benefit developers of larger projects and may undercompensate smaller developers.

Analysis of net cash developer fees in the Metro Affordable Housing Bond portfolio by project scale

Project size	Average	Percent		Total Dollar Amount	
		Minimum	Maximum	Minimum	Maximum
<31 Units ⁷	-	-	-	-	-
31-75 Units	8.1%	4.7%	13.4%	\$450,000	\$1,845,001
76-100 Units	9.7%	7.5%	13.1%	\$1,744,999	\$4,365,226
100+ Units	4.8%	-0.6%	12.3%	-\$223,860	\$5,198,483

Analysis of impacts

Metro analyzed the hypothetical impact of the proposed fees across the existing bond portfolio and found that proposed tiers would primarily impact larger developers and larger projects, the majority of which (but not all) are led by larger and for-profit organizations. The majority of projects in the existing portfolio are within the proposed range. Only four projects were above the \$3 million ceiling.

The net cash developer fees for 24 projects in Metro Affordable Housing Bond portfolio (in \$ millions) are as follows:

-\$0.22	\$0.13	\$0.45	\$0.52	\$1.04	\$1.21	\$1.40	\$1.64	\$1.65	\$1.74	\$1.84	\$1.85	\$1.88	\$2.03	\$2.09	\$2.12	\$2.14	\$2.29	\$2.55	\$2.95	\$3.49	\$3.52	\$4.37	\$5.20
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Racial equity analysis

In considering how to operationalize racial equity in the developer fee, Metro considered prescriptive approaches, such as a point system that would formulaically award points based on different criteria related to project scale, organization type, and track record and/or commitments for advancing racial

⁶ This represents 3 projects, all of which are partnerships between for-profits and non-profits.

⁷ No projects in the housing bond portfolio as of August 2021 are less than 31 units.

equity through community engagement, fair housing, contracting/workforce, and culturally responsive design and services. Such an approach would allow a direct, clear correlation between the net cash fee and Metro's guiding principles. It also would require a complex structure and oversight.

Metro staff believe a more flexible, values-based approach will be simpler while still advancing the guiding principles, and it will provide the flexibility to support the range of development partnership models we see across the regional portfolio. These include partnerships and/or joint ventures between established developers and emerging community-based and culturally specific developers as well as projects led by smaller, community based and culturally specific development organizations.

Metro is using a flat dollar amount approach to the ceiling rather than a percentage-based approach out of a recognition that percentage based approaches may over-compensate developers of larger projects. In addition, the tiered ranges are intended to ensure some level of consistency in developer compensation for similarly sized projects.

It is anticipated that the sliding scale will provide flexibility for LIPs to provide higher fees to project teams that include a meaningful partnerships with culturally specific organizations that will receive a portion of the fee. It will also provide flexibility for LIPs to continue to weigh considerations such as project complexity and risk, such as permanent supportive housing projects that serve individuals and families exiting homelessness—who are disproportionately BIPOC.

Finally, in discussing the potential for the developer fee to support the value of leading with racial equity, Metro staff also discussed the important role of local funding solicitation and evaluation processes in prioritizing these outcomes. We believe there are opportunities for LIPs to strengthen requirements and criteria related to advancing racial equity in the local project solicitation process. Metro would like to continue to work collaboratively with developers and LIPs to better understand and realize these opportunities in future solicitations for Metro bond funds.

Next steps

- October: Engagement with partners and key stakeholders.
- Early November: Final guidelines distributed to partners.
- December 1, 2021: New guidelines take effect.

METRO HOUSING BOND QUARTERLY REPORT | JULY-SEPTEMBER 2021

October 7, 2021

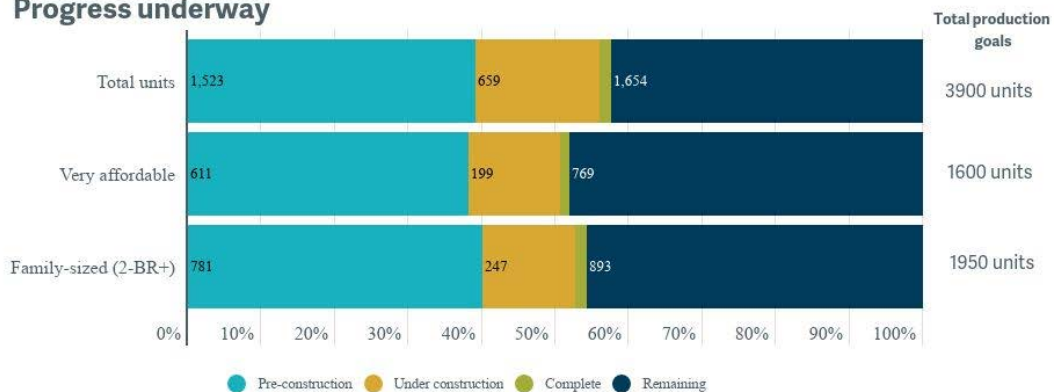
This is the third quarterly progress report for the Metro Affordable Housing Bond of 2021. Similar reports are produced quarterly with the goal of keeping the Housing Bond Community Oversight Committee, Metro Council, and other stakeholders and partners informed about ongoing implementation progress. A more detailed report will be provided annually for each calendar year, following submission of local progress reports by each participating implementation jurisdiction for review by the Oversight Committee.

PROJECTS UNDERWAY

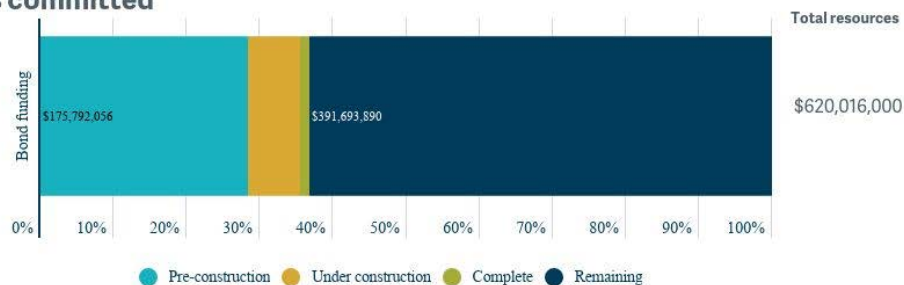
As of the end of September 2021, fourteen projects have received a Metro concept endorsement and are in pre-construction, representing 1,523 units in the pre-development stage. Seven projects have received final approval, representing 659 units currently under construction. The housing bond program opened its first 64 units with the completion of 10 Metro-bond units at Rockwood Village in Gresham and 54 units at the Mary Ann in Beaverton. Collectively, these projects represent 2,246 new affordable homes, or 57.6% of the total production target for the Housing Bond, while using up approximately 36.8% of funding. Of the homes in the housing bond pipeline, 1,096 will have two or more bedrooms, representing 56.2% of the Housing Bond’s target for family-sized homes; and 814 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 50.8% of the Housing Bond’s target for deeply affordable homes.

Production and funding dashboard

Progress underway



Resources committed



In August, Metro provided final approval for the Hattie Richmond project, formerly Baldwin PSH, submitted by the Portland Housing Bureau (PHB). Metro staff are currently reviewing a concept endorsement request for the Elmonica project submitted by the City of Beaverton, and final approval requests of Washington County's Terrace Glen and Clackamas County's Good Shepard project. These pending approvals will be included in the next quarterly report.

LOCAL IMPLEMENTATION PROGRESS AND UPDATES

Local implementation progress and activities for the third quarter are summarized below.

Home Forward

- **Housing Bond Progress:** Home Forward's Dekum Court project will contribute 147 units to Portland's overall unit production goal (see below).
- **Dekum Court project:** The environmental review process and selection of financing partners has been completed. Lenders started appraisal work in preparation of due diligence reviews and there is ongoing coordination between the design team and the city of Portland to review permits. A pre-apprenticeship fair and a Community Advisory Committee meeting were held on September 16th and the construction of the off-site Head Start site has begun.
- **East County project:** MWA Architects and Bremik Construction meet weekly and expect the project concept plan to be completed in October. Three focus groups were held in August with Spanish-speaking, eastern European and Black residents of East County. A Community Advisory Council is expected to host its first meeting on October 27th. Home Forward staff presented at the City of Troutdale's rent burdened meeting on September 29th.

Portland

- **Housing Bond Progress:** 431 units are currently in the pipeline representing **29%** of Portland's overall unit production target. The MBOS is anticipated to include an additional 687 units, which would bring Portland overall unit production to **76%**.
- **Portland's Metro Bond Opportunity Solicitation:** The Portland Housing Bureau (PHB) received twenty-four (24) proposals at the solicitation deadline on July 2nd, 2021. Beginning in July, a three-part evaluation process of the proposals was conducted by PHB staff which included technical, financial and community committee reviews. PHB has recommended seven (7) developments for Metro bond funding of \$90.7 Million which will provide a total of 687 new affordable housing units. The M-BOS prioritized dedicated supportive housing and family-focused housing projects. Of the 687 planned units, 297 will serve household at 30% AMI, 376 are 2 bedrooms or larger and 122 are designed as supportive housing units for chronically homeless individuals, couples or families.
- **East Portland projects:** PHB will be recommending two additional Phase II projects for Metro Bond funding. The two projects, **Powellhurst Place** and **Garden Park**, will utilize

\$5.5M of Metro Bond funding for a total of 118 units of new affordable housing in East Portland.

- **Hattie Richmond (formerly Baldwin PSH):** The project received final approval in August and will provide 60 studio units to people making less than 30% area median income and will include on-site resident services provided by case managers and peer support specialists. The project will be located in North Portland and is scheduled to break ground in October.

Clackamas County

- **Housing Bond Progress:** 459 units are currently in the pipeline representing **57%** of Clackamas County's overall unit production target.
- Press releases will be released soon, notifying the public of ongoing construction at **Fuller Road Station** and the **Webster Road** projects. Both projects anticipate holding in-person grand openings next year.
- A final approval request for **Good Shepherd Village** is currently under review and will include a disbursement of \$18,330,000. A final approval request for **Maple Apartments** is planned for November.
- Staff are drafting a second round of bond NOFAs, to be released in the 1st quarter of 2022. Clackamas County anticipates availing an estimated \$20 to \$30 Million through this NOFA.
- The Housing Authority of Clackamas County is working with Metro and the city of Lake Oswego to release a developer solicitation (RFP) for the **Boones Ferry** site next year.

Washington County

- **Housing Bond Progress:** 808 units are currently in the pipeline representing **99%** of Washington County's overall unit production target
- The **Viewfinder project** has started leasing activities. This lease-up process involved marketing to community groups serving BIPOC communities. An information session to sign-up for the waitlist was held in partnership with the Somali Empowerment Circle. These early lease-up activities helped the Supportive Housing Services team establish a preference for 11 units at the Viewfinder for individuals needing permanent supportive housing.
- The **Valfre at Avenida 26** held its groundbreaking on September 7th. Once completed the project will provide 36 units, 30 of which will be family-sized.
- A final approval request for **Terrace Glen** is currently under review and will include a disbursement of \$17,484,000. The project is anticipated to break ground in January.
- Final approval requests for the **Aloha Quality Inn** and the **Goldcrest Apartments** are anticipated in November and December, respectively. Construction for the Goldcrest Apartments is anticipated January of next year.

Hillsboro

- **Housing Bond Progress:** 149 units are currently in the pipeline representing **52%** of Hillsboro's overall unit production target.
- A final approval request for **Nueva Esperanza** is planned for December, along with a disbursement request of \$16,940,731.

Metro Site Acquisition Program

- Metro's Site Acquisition Program signed an exclusive negotiating agreement (ENA) with REACH CDC to develop affordable housing on Metro's property near the Elmonica MAX Station in Beaverton. REACH was selected as the site's preferred developer after a joint solicitation process between Metro and the City of Beaverton earlier in the year.
- In June, the Housing Authority of Clackamas County, City of Lake Oswego, and Metro entered into a Memorandum of Understanding to explore developing a Housing Bond project on a 1.4 acre city-owned property on Boones Ferry Road near West Sunset Drive.

Beaverton

- **Housing Bond Progress:** 218 units are currently in the pipeline representing **100%** of Beaverton's overall unit production target.
- A concept endorsement request for the **Elmonica Project** is currently under review. Due to a dynamic situation with the adjacent property, REACH, the city of Beaverton and Metro will be striving to complete predevelopment by summer 2022.
- Beaverton opened its doors to residents with the completion of 54 units at the **Mary Ann**. One household has been approved for move-in, 20 applications are in process and there are 87 households on the 1-BR waiting list and 74 household on the 2-BR waiting list. The project will also include eight (8) project-based section 8 vouchers.

Gresham

- **Housing Bond Progress:** 194 units are currently in the pipeline representing **104%** of Gresham's overall unit production target.
- **Rockwood Village** (formerly Rockwood 10) welcomed its first residents to the first completed building on the property. Of the 39 completed units at the project, 10 are Metro-funded units. Construction completion of Rockwood Village is expected in February of next year.
- Construction is proceeding at **Albertina Kerr**, which will provide 147 units of affordable housing. Construction completion is anticipated in the spring of 2022.
- Gresham will begin the process for its next solicitation, which is anticipated in 2022.

Metro Housing Bond – Project progress and status

Jurisdiction	Project Name/former name	Project Status	Development Team (Developer/GC)	Eligible bond units	30% units	2+ BR	Anticipated Completion
Beaverton	Mary Ann	Complete	REACH/Walsh	54	11	29	May-2021
	Scholls Ferry	Pre-construction	Wishcamper/COLAS	164	12	84	Oct-2022
Clackamas	Fuller Road Station	<i>In Construction</i>	GSA, GRES/R&H Construction	99	25	82	Oct-2021
	Good Shepherd Village	Pre-construction	Caritas, Catholic Charities/Walsh	141	58	79	Mar-2023
	Maple Apartments	Pre-construction	CDP, Hacienda CDC/LMC	171	70	129	Mar-2023
	Webster Road	<i>In Construction</i>	HACC/Walsh	48	48	0	May-2022
Gresham	Albertina Kerr	<i>In Construction</i>	Gerdin Edlen/Pence	147	30	31	Mar-2022
	Rockwood Village/Rockwood 10	Complete*	CDP/LMC	47	47	39	Feb-2022
Washington	Aloha Housing Development	Pre-construction	BRIDGE/LMC	81	33	50	Sep-2022
	Aloha Quality Inn	Pre-construction	HAWC/(TBD)	54	54	0	Jan-2022
	Plambeck Gardens/ Basalt Creek	Pre-construction	CPAH/LMC	116	47	60	Sep-2023
	Goldcrest/ Cooper Mountain	Pre-construction	BRIDGE/COLAS	74	14	45	Jun-2022
	Plaza Los Amigos	Pre-construction	REACH/LMC	112	26	72	May-2022
	Saltzman Road	Pre-construction	Home First/Beaudin	53	30	9	Jul-2023
	Terrace Glen	Pre-construction	Related NW/Walsh	144	46	73	Dec-2022
	The Valfre at Avenida 23/ Forest Grove Family Housing	<i>In Construction</i>	DCM Communities/LMC	36	8	30	Sep-2022
	Tigard Senior	Pre-construction	NHA/Walsh	57	23	0	Jan-2023
	Viewfinder/72 nd & Baylor	<i>In Construction</i>	CDP/Bremik	81	34	56	Nov-2021
Hillsboro	Nueva Esperanza	Pre-construction	Bienestar, HDC/LMC	149	60	105	Jun-2023
Portland	Hattie Richmond/Baldwin PSH	Pre-construction	Home Forward/Bremik	60	60	0	Oct-2022
	Dekum	Pre-construction	Home Forward/Walsh	147	61	75	TBD
	Findley Commons	<i>In Construction</i>	Home First/Beaudin	35	0	0	Oct-2021
	Riverplace Phase 2	<i>In Construction</i>	BRIDGE/Walsh	176	17	48	Sep-2022
TOTALS				2246	814	1096	

*Rockwood Village has completed 10 of its 47 Metro bond-funded units. The city of Gresham expects full construction completion February 2022.

** 23 projects are currently in the Metro HB pipeline. Only one project, The Mary Ann in Beaverton, has reached full construction completion. Construction at Rockwood Village is ongoing, as the project has completed its first 10 of 47 Metro bond units. Another seven projects are currently under construction. The remaining 14 projects are in the pre-construction phase.

METRO AFFORDABLE HOUSING BOND

Financial Report Through September 2021

FINANCIAL SUMMARY

TOTAL REVENUE	\$682,082,545
TOTAL EXPENSES and DISBURSEMENTS	\$76,888,000
TOTAL COMMITTED	\$161,132,971
TOTAL FUNDING AVAILABLE	\$444,061,575

REVENUE

	FY 2018 - 2020	FY 2020 - 2021	FY 2021 - 2022	TOTAL REVENUE
Bond Proceeds	\$652,800,000			\$652,800,000
Premiums on Bonds	\$2,630,335			\$2,630,335
Interest Earnings	\$16,059,696	\$9,099,166	\$1,493,348	\$26,652,210
TOTAL REVENUE:	\$671,490,031	\$9,099,166	\$1,493,348	\$682,082,545

<--- "Premiums on Bonds" and "Interest Earnings" not included in Work Plan Funding = \$29,282,545

EXPENSES

PROJECTS	FY2018-2020 Expended or Disbursed	FY2020-2021 Expended or Disbursed	FY 2021-2022 Expended or Disbursed	Committed -- Not Yet Disbursed	TOTAL EXPENDED, DISBURSED or COMMITTED	WORK PLAN FUNDING	% of Work Plan Funding Expended, Disbursed or Committed
Jurisdiction:							
Beaverton	\$3,000,000	\$0	\$0	\$9,000,000	\$12,000,000	\$ 31,140,595	38.53%
Clackamas County	\$2,609,333	\$11,509,209	\$0	\$34,233,000	\$48,351,542	\$ 116,188,094	41.61%
Gresham	\$0	\$16,352,030	\$0	\$0	\$16,352,030	\$ 26,756,995	61.11%
Hillsboro	\$0	\$0	\$0	\$16,940,731	\$16,940,731	\$ 40,657,081	41.67%
Home Forward (East Multnomah Co.)*	\$0	\$0	\$0	\$0	\$0	\$ 15,879,123	0.00%
Portland*	\$0	\$3,684,394	\$4,411,737	\$22,910,240	\$31,006,371	\$ 211,056,579	14.69%
Washington County	\$11,583,000	\$5,650,000	\$3,792,088	\$78,049,000	\$99,074,088	\$ 116,465,532	85.07%
Metro Site Acquisition Program	\$159,977	\$4,640,885	\$32,579	\$0	\$4,833,441	\$ 62,016,000	7.79%
TOTAL ACTUAL & COMMITTED PROJECT EXPENSES:	\$17,352,310	\$41,836,518	\$8,236,404	\$161,132,971	\$228,558,203	\$ 620,160,000	36.85%

*Home Forward's Dekum Court project is reflected under the Portland allocation and commitments, since funding for this project was part of the funding initially allocated to City of Portland.

ADMINISTRATIVE	FY2018-2020 Expended or Disbursed	FY2020-2021 Expended or Disbursed	FY 2021-2022 Expended or Disbursed	TOTAL EXPENDED or DISBURSED	WORK PLAN FUNDING	% of Work Plan Funding Expended or Disbursed
Jurisdiction:						
Beaverton	\$223,898	\$115,118	\$115,118	\$454,134	\$655,591	69.27%
Clackamas County	\$489,213	\$489,213	\$489,213	\$1,467,639	\$2,446,065	60.00%
Gresham	\$0	\$140,826	\$168,991	\$309,817	\$563,305	55.00%
Hillsboro	\$171,188	\$171,188	\$171,188	\$513,564	\$855,939	60.00%
Home Forward (Multnomah County)	\$0	\$167,148	\$167,149	\$334,297	\$334,297	100.00%
Portland	\$0	\$0	\$0	\$0	\$4,443,296	0.00%
Washington County	\$1,068,690	\$0	\$345,450	\$1,414,140	\$2,451,906	57.68%
Metro Site Acquisition Program	\$0	\$0	\$0	\$0	\$1,305,600	0.00%
<i>Metro Accountability and Financial Transaction Costs</i>						
One-Time Financial Issuance	\$1,867,934	\$0	\$0	\$1,867,934	\$13,056,000	38.06%
Ongoing Financial Management Costs	\$233,226	\$179,721	\$24,549	\$437,496		
Accountability, Oversight & Indirect	\$744,287	\$1,059,610	\$859,850	\$2,663,746		
Reserved for Future Allocations					\$6,528,000	0.00%
TOTAL ACTUAL & COMMITTED ADMINISTRATIVE EXPENSES:	\$4,798,436	\$2,322,824	\$2,341,508	\$9,462,767	\$32,640,000	28.99%

** PHB's Project Delivery Fee is an administrative reimbursement, not paid for by Metro's Affordable Housing Bonds

*** Metro's Finance and Regulatory Services has determined that all Metro Site Acquisition Program expenses are considered Project Expenses

Materials following this page were distributed at the meeting.

Testimony for 11/4/21 Council meeting

I strongly urge you to kill the I5 bridge project. Despite the claims of the planners, it is clearly a freeway expansion, which we do not need. We should not continue building more and more freeway lanes that will induce demand and increase pollution. Our planet needs less cars - and it doesn't matter if the cars are electric or gas, single occupancy vehicles are bad for the environment.

Please do NOT approve the amendment to the Metropolitan Transportation Improvement Program (MTIP).

Chris Shaffer
1533 SE 32nd Ave
Portland, OR 97214

**Chris Smith Testimony for 11.4.21 Council meeting
Attachments- RMPP Purpose and Need Comments.pdf**

Comments on I-205 Toll Project submitted on behalf of No More Freeways for the Metro Council hearing on Nov 4. I also plan to testify by zoom at the hearing.

No More Freeways and several partner organizations recently submitted comments to ODOT on the Regional Mobility Pricing Project that are quite pertinent to this project as well, and I am attaching those comments.

JPACT and Metro Council have directed that regional congestion pricing policy be developed in the 2023 RTP. A key point of Metro's research on the topic is that how revenue from pricing is spent is critical to the equity outcomes of pricing. But ODOT seeks to pre-empt Metro's process and dedicate the majority of pricing revenue to widening freeways via three separate projects with siloed policy analysis: I-205 Tolling Project, Regional Mobility Pricing Project and IBR tolling.

The region deserves a robust conversation about pricing on a regional basis. If Metro has established that this policy development should occur in the 2023 RTP process, then ODOT's pricing projects should also be processed as part of the RTP, and NOT BEFORE.

Several other points I would emphasize:

- Pricing motor vehicle travel is a critical tool for addressing our climate emergency, but using the revenue from that pricing to expand freeways is counter productive and wastes the opportunity to shift travel to transit, biking and walking and to serve the region's equity, climate and safety goals.
- ODOT is creating a pattern of doing NEPA analysis on construction projects, then later doing a separate NEPA process for pricing which would fund the project. This is a faulty process that avoids analyzing pricing as an alternative to construction.
- During discussion of the I-205 Toll Project, leaders in Clackamas County have fairly called out the lack of a robust transit alternative to the highway. ODOT should be required to analyze a transit alternative to the construction project.

Submitted by Chris Smith on behalf of No More Freeways.



Date: September 29, 2021

To: Oregon Toll Program (ODOT)

CC: Oregon Governor Kate Brown
Portland Commissioner Jo Ann Hardesty
Multnomah County Commissioner Jessica Vega Pederson
Metro Council President Lynn Peterson
Oregon Legislature - Joint Committee on Transportation

From: Aaron Brown, No More Freeways
Chris Smith, No More Freeways
Joe Cortright, No More Freeways
Mary Peveto, Neighbors for Clean Air
Paxton Rothwell, Sunrise PDX

Subject: Comments on Regional Mobility Pricing Project draft Purpose and Need

No More Freeways PDX and our partner organizations appreciate the opportunity to comment on the Draft Purpose and Need Statement for the Regional Mobility Pricing Project. We are fans of pricing as a tool to improve the equity, sustainability and functioning of our regional transportation system.

Having said that, we have to express our extreme disappointment with ODOT's approach to pricing as expressed in this Purpose and Need Statement and in other projects.

The purpose of a pricing system needs to be the management of congestion and the reduction of Vehicle Miles Travelled (VMT) and the associated impacts of over-reliance on single-occupancy automobile trips - NOT the expansion of freeway facilities.

Here are our detailed concerns:

- No More Freeways' core philosophy is that just as the use of horses for urban transportation reached a point more than a century ago where it simply could not scale, leaving cities awash in a flood or horse manure, we now have reached the point where the single-occupancy vehicle, and freeways especially, cannot scale to meet the needs of urban transportation. Our society cannot tolerate the greenhouse gas emissions, air toxics and particulates, horrendous safety impacts and long-standing inequities arising



from considering the SOV as the core of our transportation system. In addition we are simply running out of space to store and move vehicles that consume so much space to hold in most cases a single occupant.

As such, ODOT's efforts to continue expanding the freeway system in the Portland metro area are anathema to our vision of an equitable and effective transportation system. In particular we object to the "build it, then price it" approach to the projects underway for RMPP, IBR and I-205 pricing.

In all cases pricing should be considered as an **alternative** to freeway expansion, rather than being applied after construction of new facilities.

- The document is devoid of any mention of induced demand. The regional approach of inducing demand via new capacity, then seeking to manage that demand via pricing is counterproductive and will waste resources that could be better spent addressing climate, equity and the critical safety needs of ODOT's orphan highways in the region.

How revenues are spent is a critical factor in whether any pricing system is equitable. Revenue from congestion pricing should be focused on giving disadvantaged communities alternatives to buying and maintaining an expensive vehicle to be able to access our transportation system. Solutions that expand transit, biking and walking options are critical to both the equity and sustainability of our transportation system. Dollars spent on expanding freeway capacity have negative returns to the community.

You cannot serve two masters. Attempting to set a toll rate that funds freeway expansion projects **and** provides funding to multi-modal alternatives will result in increasing the cost of the transportation system while significantly reducing the expansion of much needed alternative options.

- The document fundamentally mis-identifies the sources of emissions from our road network. The approach in the document suggests, as made clear by one subheading that "Our transportation system must reduce greenhouse gas emissions by managing congestion."

Let's be clear. While traffic congestion may result in concentrating emissions in some areas, the source of greenhouse gases and other emissions is **traffic**, not traffic congestion. A larger amount of free flowing traffic produces more emissions than a lesser amount of congested traffic¹. The misdirection in this document is a criminal deception on this point.

¹ Alexander Y. Bigazzi, Miguel A. Figliozzi (2012). Congestion and emissions mitigation: A comparison of capacity, demand, and vehicle based strategies, Transportation Research Part D: Transport and Environment, Volume 17, Issue 7, Pages 538-547. https://pdxscholar.library.pdx.edu/cgi/viewcontent.cgi?article=1130&context=open_access_etds



The core metric that drives so many of the negative system impacts is Vehicle Miles Traveled (VMT). VMT drives all flavors of emissions and is also critical for safety. Crashes, injuries and deaths are proportionate to VMT. While because of its limited access nature, freeway miles are generally safer, there are no freeway-only trips. Freeway trips start and end on the local street network, where traffic deaths are now at record levels.

VMT reduction is a footnote in this document. It must become a major theme.

Transportation contributes 40% of the greenhouse gas emissions in our region, and these emissions are increasing. We must reduce VMT to curb these emissions. Electrification of the fleet will not happen quickly enough to meet national and international climate goals, and does nothing to reduce the impacts of congestion and particulate pollution from tire and brake wear.

- This proposal is freeway-centric and does not look at the whole transportation system. Both Metro² and the City of Portland³ have congestion pricing studies in progress, and this project references neither. In particular, the Metro study analyzes four approaches to pricing analyzed against Regional Transportation Plan goals and suggests that the segment tolling approach that ODOT is pursuing may not be the optimal approach. ODOT is blinded by its desire to fund the expansion of freeways and needs to be a much better regional partner.

² Metro Regional Congestion Pricing Study, Final Report July 2021
<https://oregonmetro.legistar.com/View.ashx?M=F&ID=9783574&GUID=BAC80BE1-9549-4721-806D-F1194FA9B605>

³ City of Portland Pricing Options for Equitable Mobility (POEM)
<https://www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem>

Doug Allen Testimony for 11/4/2021
Attachments- Express Bus 2.pdf

Please forward the following testimony to the Metro Council, including the attached "Express Bus 2.pdf" presentation, relating to Nov. 4 Agenda Item 5.1.1 Public Hearing for Ordinance No. 21-1467, a proposed RTP amendment for I-205 tolling.

Council President Peterson and Councilors:

1) ODOT plans to add 14 lane-miles of freeway to this region and planet, in addition to seismic strengthening of the Abernethy Bridge and other related work. The VMT that will be induced by the additional miles of freeway lanes, and the VMT that will be suppressed by tolling, are currently unknown. Why? Because the project was excluded from a full environmental analysis. Not only were reasonable alternatives not considered, but an important component of the actual project, tolling, was not analyzed.

2) In July of 2017, the Oregon Legislature passed HB 5045, which included the following budget note:

"The Oregon Department of Transportation is directed to ensure an ongoing commitment to fully fund congestion relief on I-205, including but not limited to the Stafford Rd to Abernethy Bridge bottleneck. Pursuant to HB 2017, any value pricing revenue shall be dedicated to I-205. In the event that value pricing revenue is not sufficient, or should value pricing prove not to be a viable funding source, the agency shall report immediately to the Legislative Assembly on the funding issues along with specifics on funding needs and options available to the Legislative Assembly to quickly remedy such funding gaps. An initial report shall be provided to the Joint Transportation Committee no later than the last legislative days in calendar year 2018."

3) At the May 23, 2018 meeting of the Joint Committee on Transportation, ODOT presented their I-205 "Cost to Complete" report. Co-chair Senator Lee Beyer asked when ODOT was going to ask for permission from the Feds to do value pricing: "My question would be: At what point do we have the information necessary to submit to the Federal Government, the right to do the value pricing on this?"

ODOT Region 1 Manager Rian Windsheimer gave the following answer:

"This report does not assume, um, tolling as a, as a revenue source. This cost to complete report assumes that we are moving forward with what's known as a Categorical Exclusion in terms of our environmental process. We've been running to complete that, and that's what these, all these assumptions assume.

If you were to move forward with uh, uh, asking to move forward with a tolling scenario, we would need to back up, and begin an environmental process around that tolling effort. And so that would be up to two, three, or more years of environmental work associated with

implementing tolling, so that is going to vastly change what you are seeing here, in terms of the cost-to-complete report, and the timeline.

Um, your question regarding when are we talking about submitting to the Federal Government as part of the value pricing component that we're going to be forwarding? I know you're going to get a chance to hear more from Travis about this a little bit later, but we expect to have that by the end of the year [2018]."

Sen. Beyer then said: "My assumption, and I think the Committee's assumption, is that this would be a tolling project, [murmurs of agreement from Committee] and I don't know where you are gonna get the money, or where we're gonna get the money, if we don't do it that way."

4) ODOT knew that if the project were properly analyzed for environmental effects, they would need to consider reasonable alternatives with less effect on the environment, which would obviously involve a) looking at how much traffic would be suppressed by tolling versus induced by the expansion, and b) investigating a robust transit solution for the whole I-205 and Hwy 217 outer freeway loop.

5) ODOT decided to separate out the tolling analysis, to avoid looking at the actual effect of tolling on the need for the project, or to evaluate potential mitigating components of the project.

6) ODOT applied for, and received, a NEPA "Categorical Exclusion" in December, 2018. In their application to the Federal Highway Administration, they declared that tolling was "not reasonably foreseeable" despite the legislative directive.

7) ODOT now wants to get the NEPA analysis for tolling done, so they will have a stream of revenue to repay the bonds that they intend to sell for constructing the project.

8) Metro needs to direct ODOT to properly analyze the project, and consider alternatives that take into account the VMT suppression from tolling and provide a robust transit alternative. Not because NEPA requires this, but because this is the only way to move toward compliance with regional and statewide greenhouse gas reduction goals.

9) Metro should not move forward with an RTP amendment, and should withhold subsequent MTIP approval until ODOT agrees to do the needed analysis of alternatives.

By "robust transit alternative" I don't mean a fake commitment to some form of additional transit service, without any funding for actual transit service. Robbing resources from existing TriMet riders is unacceptable.

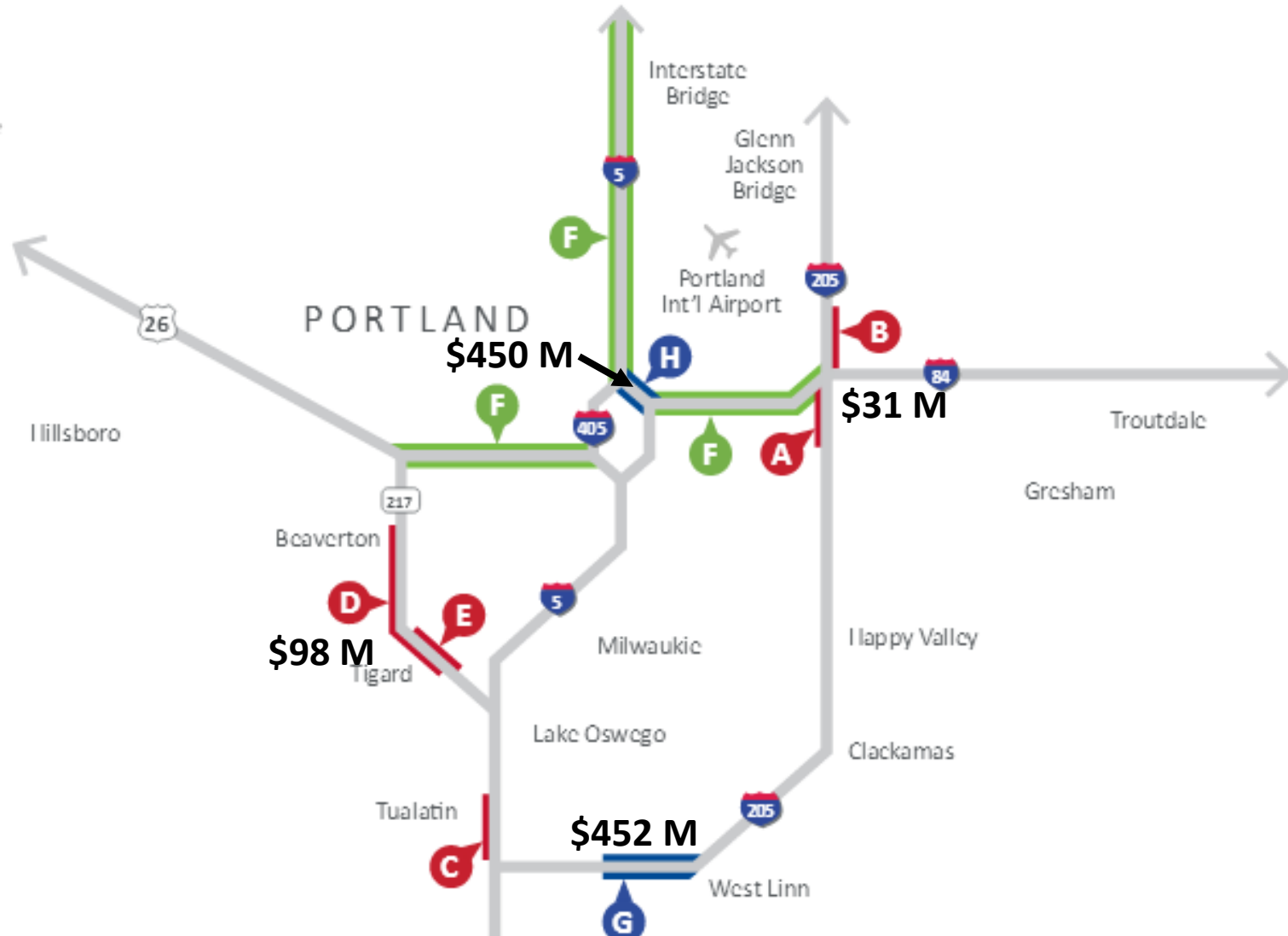
One alternative to consider is a frequent express bus connecting various points between Clackamas Town Center and Beaverton Transit Center along I-205, I-5, and Hwy 217, funded by

ODOT. Clackamas County Commissioner Paul Savas has frequently mentioned the need for something like this, citing the current lack of transit alternatives in the corridor.

I have attached an Express Bus concept proposal created by retired transit planner Jim Howell. With suitable use of congestion pricing, much of this route could be managed to keep the freeway free-flowing. This could involve a single managed lane, or all lanes subject to variable pricing. A less satisfactory alternative would be to modify the freeway in the non-tolled stretches to allow Bus on Shoulder operation to bypass congestion. When frequent express bus service is time-competitive with auto travel, and is well-integrated with an improved regional transit system, the need for expanding freeways might be reduced.

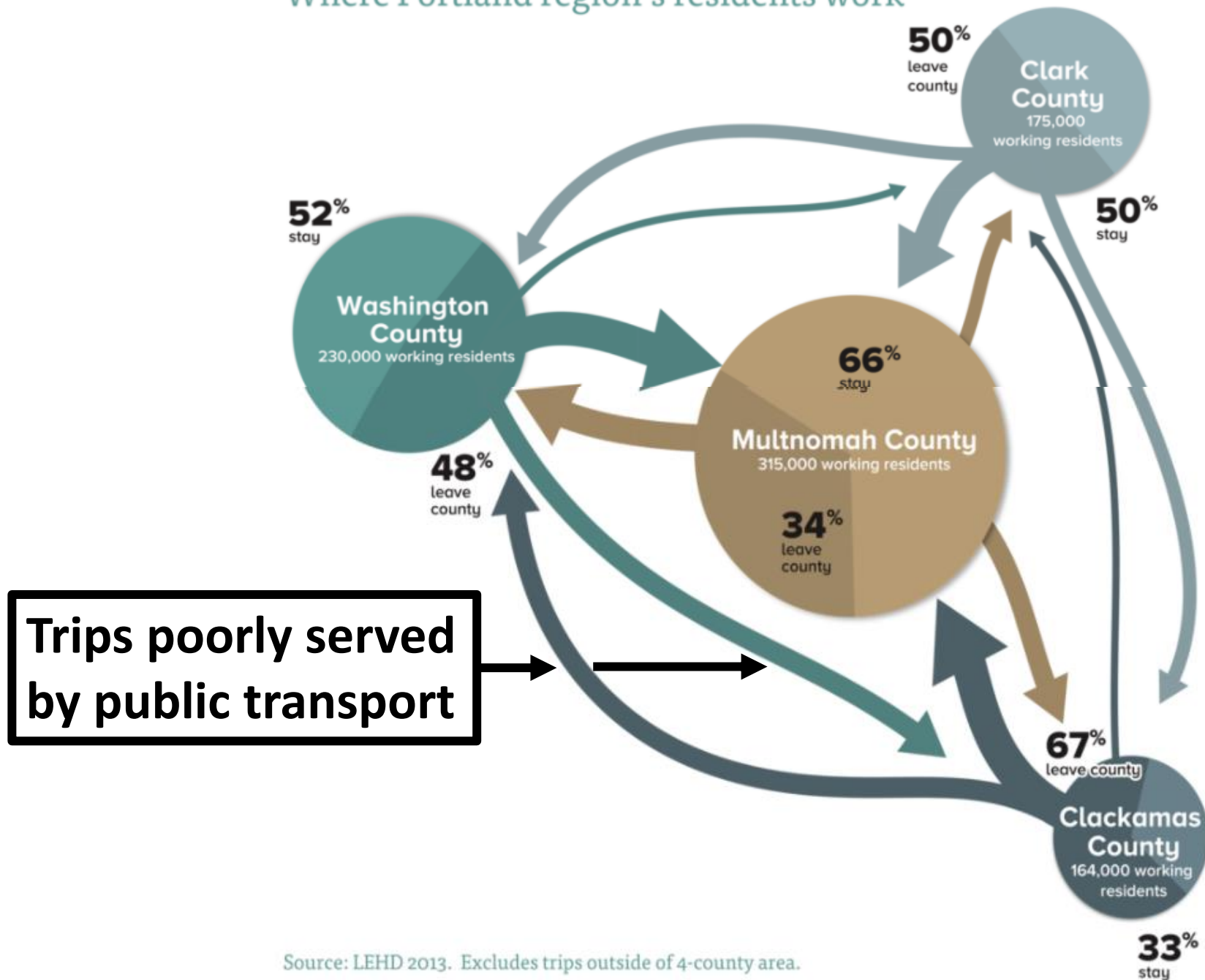
Respectfully Submitted,
Doug Allen
Douglas R. Allen
734 SE 47th Ave.
Portland, OR 97215

**How to solve Traffic Congestion with
Highway **Operation & Use** rather than
Highway **Construction & Reconstruction****

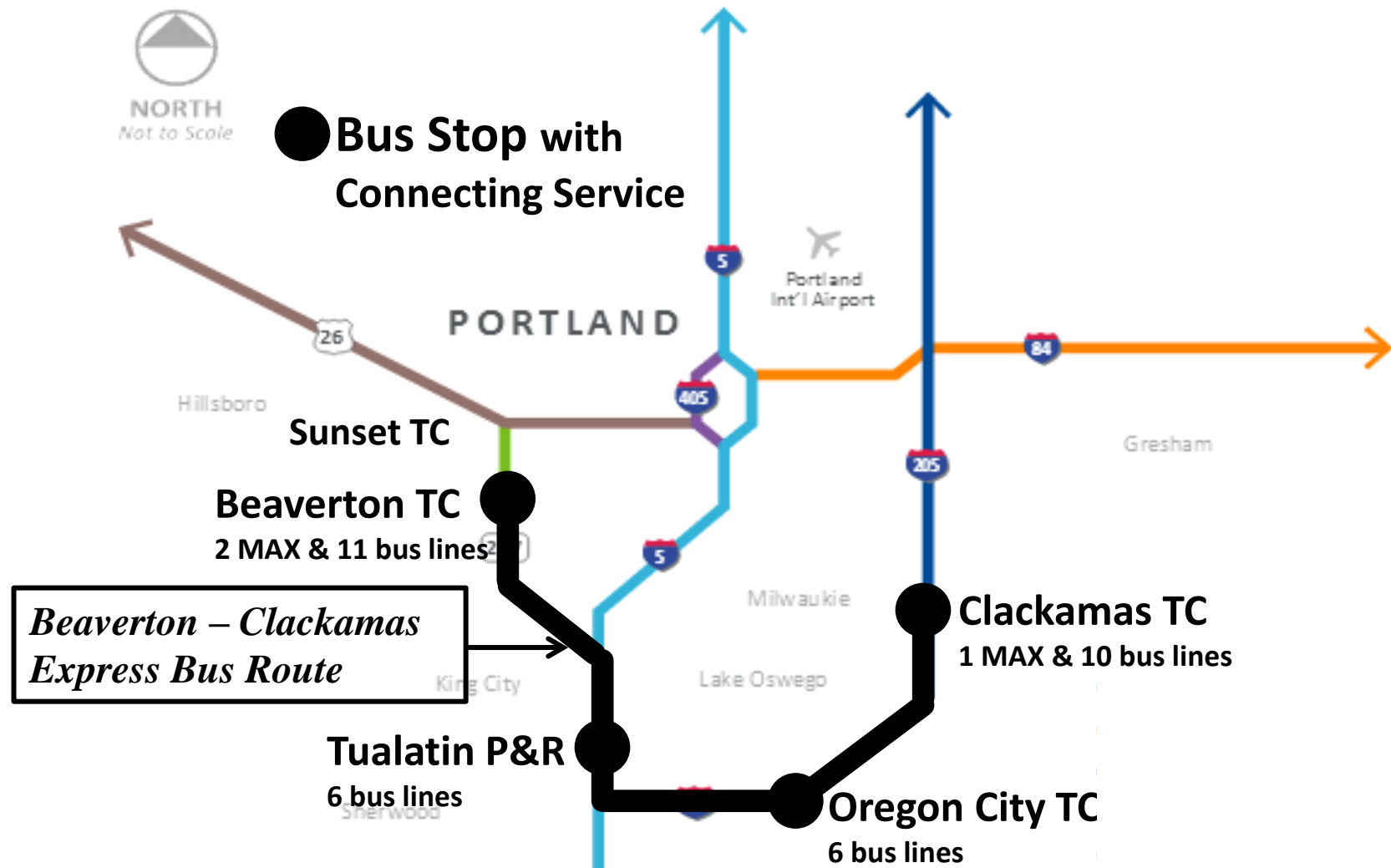


**Over a \$-billion is proposed to be spent on
The Metropolitan Portland Freeway Network
(In a futile attempt to reduce traffic congestion)**

Where Portland region's residents work



Source: LEHD 2013. Excludes trips outside of 4-county area.



***Proposed Frequent Service Express Bus Route**

(26.5 miles-long with 4 Stops and 36 Bus and MAX connections)

*By: Jim Howell 7-27-18 jimhowell89@hotmail.com

Proposed 26-mile-long Freeway Express Bus Route

Beaverton TC

Portland

217

Clackamas TC

Tualatin P&R

I-5

I-205

I-5

I-205

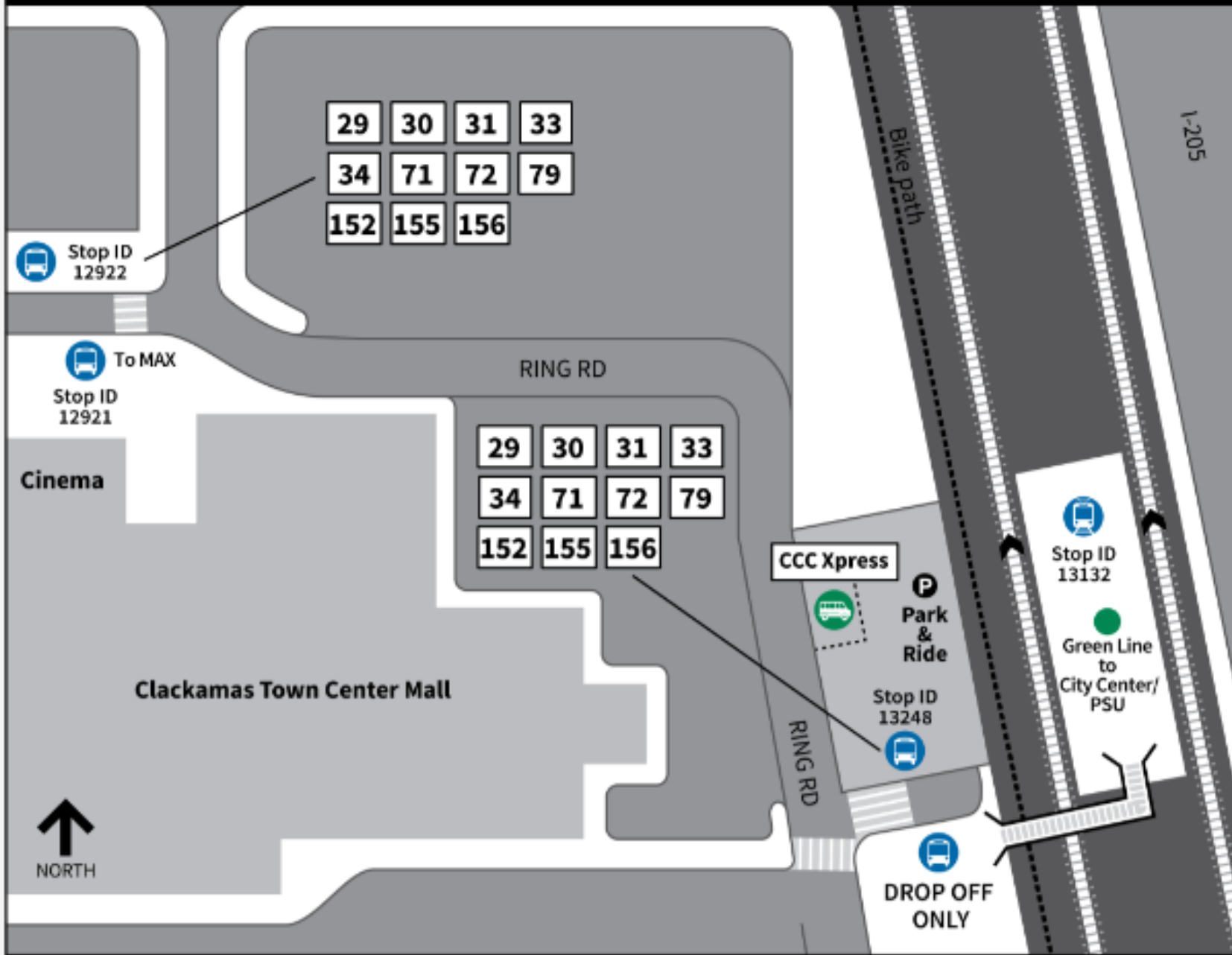
Oregon City TC





Clackamas Town Center Transit Center

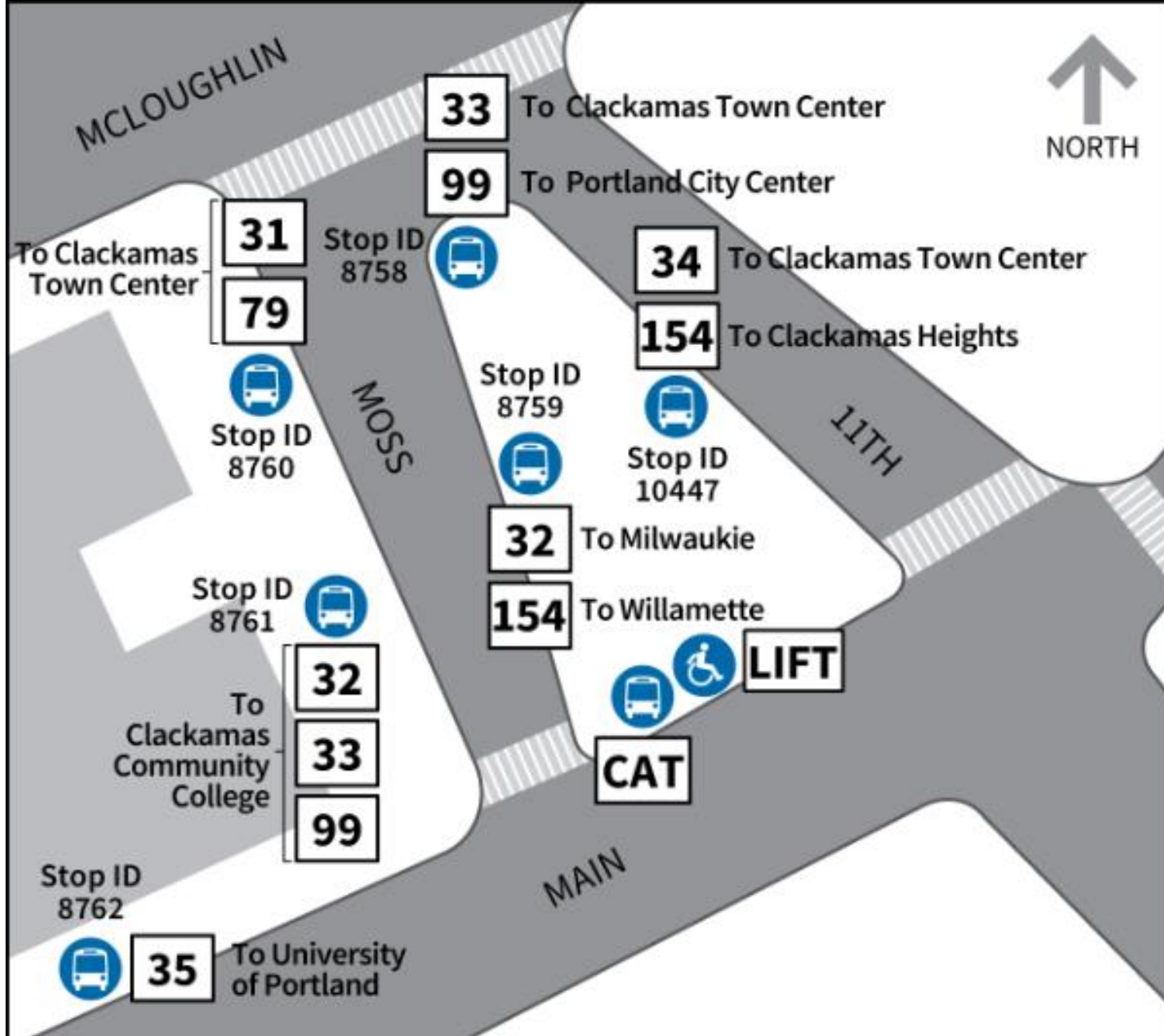
Clackamas Town Center Transit Center





Oregon City Transit Center

Oregon City Transit Center





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Google

[Report a problem](#)

Tualatin Park and Ride



Lower Boones Ferry Rd.

Lower Boones Ferry Rd.

I-5

Google Earth

Tualatin Park and Ride



© 2021 Google

Google

Beaverton Transit Center



Beaverton Transit Center





Oregon's Constitution strictly limits what can be funded with motor vehicle taxes and fees, including tolls and carbon or mileage taxes. They can only be spent on “construction, reconstruction, improvement, repair, maintenance, **operation** and **use**” of public highways and rest areas.

Purpose

- Mitigate congestion with highway **operation & use** (bus service), instead of with highway construction & reconstruction (current plan)
- Reduce vehicle miles traveled
- Replace fossil fueled cars with 100% electric buses
- Help meet Oregon's greenhouse gas reduction goals
- Reduce highway deaths and injuries
- Promote more compact land use
- Provide travel options for people without access to motor vehicles
- Eliminate the \$ billion + taxpayer cost of expanding I-205 and 217.

Operational Issues

- **Frequency and span of service needed to mitigate congestion**
- **Queue bypasses during peak travel times (bus-on-shoulder)**
- **Coordinated connection with local transit (LRT and Buses)**
- **Number and type of available buses (battery electric)**
- **Charging facilities**
- **Maintenance and storage facilities**
- **Funding and management**

**Can motor vehicle taxes and fees be
invested in highway **bus operation**
instead of highway expansion as a
way to reduce traffic congestion?**



November 2, 2021

Metro Council
600 NE Grand Ave
Portland, OR 97232

RE: I-205 Regional Transportation Plan amendments

Dear Council President Peterson and Metro Councilors,

I am writing to express support from the Washington County Board of Commissioners for Regional Transportation Plan amendments for the I-205 Improvement Project and I-205 Toll Project. I would like to address our support the two elements of the proposed amendment separately.

- **I-205 Toll Project Preliminary Engineering Phase.** Adding the I-205 Toll Project preliminary engineering phase to the financially constrained RTP project list will allow the environmental analysis to proceed for the preliminary engineering phase of the I-205 Toll Project. The completion of this analysis will provide information needed to inform public comment on the benefits and impacts of tolling on I-205 between Stafford Road and OR 213 and inform the Oregon Transportation Commission in the design, equity and mitigation needed for the Toll Project.
- **Financial commitment to the I-205 Improvement Project.** Confirming financial commitment to the construction of the Abernathy Bridge on I-205 (Phase 1a) moves us a step forward to implementing a priority project for the region. This improvement project will address a significant traffic and freight bottleneck in the region and establish a critical seismically sound bridge across the Willamette River. As a region, we supported HB 2017 and the three bottleneck projects included in that legislation—Rose Quarter, Highway 217 and I-205. With HB 3055, the State Legislature confirmed construction funding for the Abernathy Bridge (Phase 1a) on I-205, also with regional support.

On behalf of the Board, I must also add that we wish there were other ways to fund this important project without tolling. However, we accept that our support for HB 2017 included a commitment to initiate tolling in the region. We also recognize that a successful toll program can improve travel speed and reliability on our major throughways and must address equity, include mitigation for diversion and include attractive travel options to driving.

Board of County Commissioners

155 North First Avenue, Suite 300, MS 22, Hillsboro, OR 97124-3072
phone: (503) 846-8681 • fax: (503) 846-4545

Our Board will continue to engage with Oregon Department of Transportation and/or the Oregon Transportation Commission, Metro Council and other partners in support of a successful Toll Program.

Sincerely,



Kathryn Harrington

Chair, Washington County Board of Commissioners

cc: Board of County Commissioners
Oregon Transportation Commission
Oregon Department of Transportation Urban Mobility Office



November 1, 2021

Ms. Lynn Peterson, Council President
Oregon Metro
600 NE Grand Ave.
Portland, OR 97232-2736
By Email: legislativecoordinator@oregonmetro.gov

Re: THPRD Support for Resolution No. 21-5205

Dear Ms. Peterson,

Please enter the following letter of support into the record on behalf of the Tualatin Hills Park & Recreation District (THPRD) in the above-referenced matter.

THPRD supports Metro Council Resolution No. 21-5205 and urges the Metro Council to vote in favor of this resolution. Project #5, Key 22475 - Westside Trail Project Refinement - included Resolution No. 21-5205, was awarded an Oregon Community Paths grant of \$572,477 (2021-2024). This project will help complete missing segments of the Westside Trail Regional Trail network within THPRD's jurisdiction needed to realize Metro's 2014 Westside Trail Master Plan by increasing the district's ability to expediently finance and construct the trail. Filling these critical gaps will benefit the region by reducing pedestrian-motor vehicle conflicts, traffic congestion, and carbon emissions while supporting active lifestyles and connecting people to jobs, schools, shops, public transportation hubs, and downtown business and cultural districts.

A formal amendment is necessary to add the ODOT awarded project to the 2021-2026 MTIP.

Thank you for your consideration of this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "Aisha Panas".

Aisha Panas
Park Services Director



I-205 Toll Project RTP Amendment & Oregon Toll Program update

Metro Council

Presenters:

Mandy Putney(she/her)

Brendan Finn (he/him)

November 4, 2021

The challenge – congestion in the Portland region is growing, with greater impacts



By 2040, Portland-metro households will spend an average of

69 hours

each year stuck in congestion without new investments in transportation



The challenge – rising costs add to a widening wealth gap, reshaping the Portland region



Largest expenses for Americans

#1 Housing

#2 Transportation

Our charge – Urban Mobility Office



Equity



**Climate
Change**



Congestion



Safety

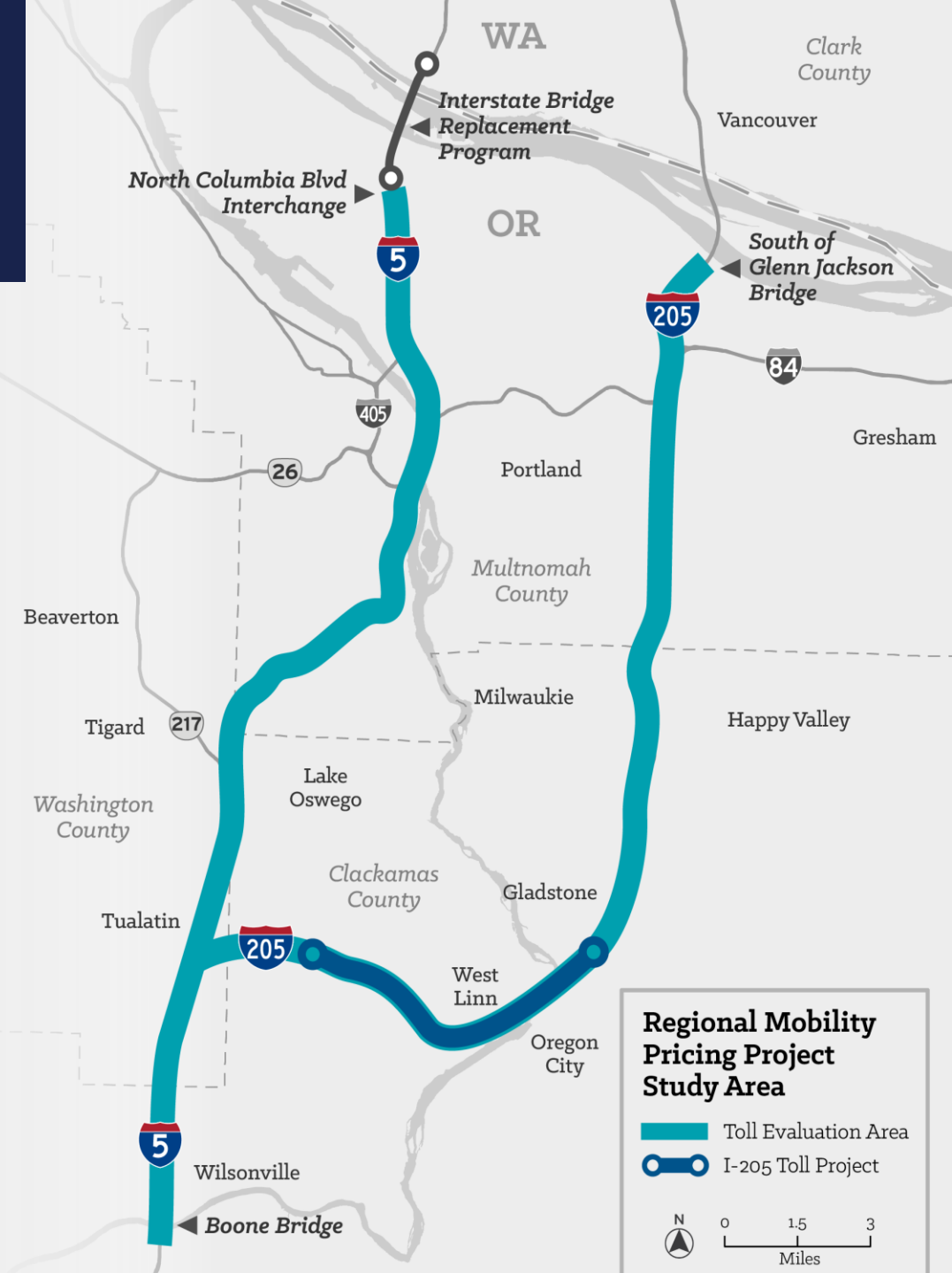


**Reliable
Funding**

Oregon Toll Program



Regional Mobility Pricing Project & I-205 Toll Project



Equity



Climate Change



Congestion



Safety



Reliable Funding

Commitments to advance equity and mobility



- Address diversion impacts to neighborhood health and safety



- Investment in transit and multimodal transportation



- Address impacts to affordability

Moving to Our Future:
*Pricing Options for **Equitable Mobility***



PBOT
PORTLAND BUREAU OF TRANSPORTATION



Regional congestion pricing study

Metro is collecting information to determine if congestion pricing can reduce traffic and greenhouse gas emissions and increase safety and equity in our regional transportation system.



Oregon Toll Program

www.OregonTolling.org

 Oregon
Department
of Transportation



Equity and Mobility Advisory Committee

Oregon Transportation Commission



Oregon Toll Program

www.OregonTolling.org

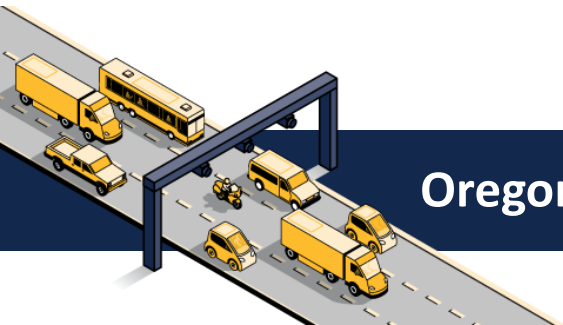
Congestion pricing and toll policy coordination

Oregon Transportation Plan update (2022-23)

Oregon Transportation Commission

Regional Transportation Plan update (2022-23)

Joint Policy Advisory Committee on Transportation
and Metro Council

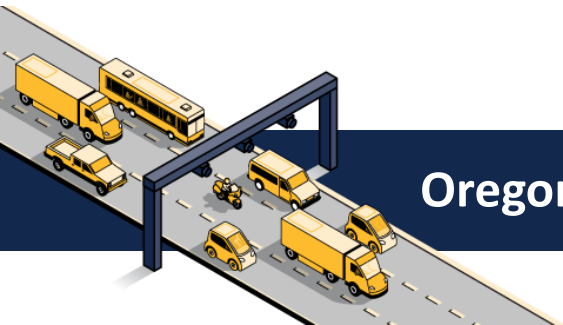


Oregon Toll Program

www.OregonTolling.org

We need funding to answer key questions (during “PE” phase)

1. How will income-based toll rates be established?
2. What are the transit and multimodal investments?
3. Where are diversion impacts located and what will be done to address them?



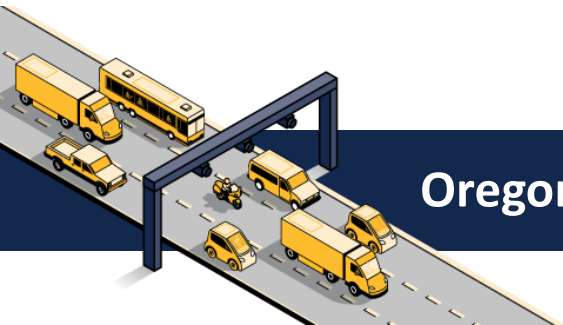


Income-Based Tolls

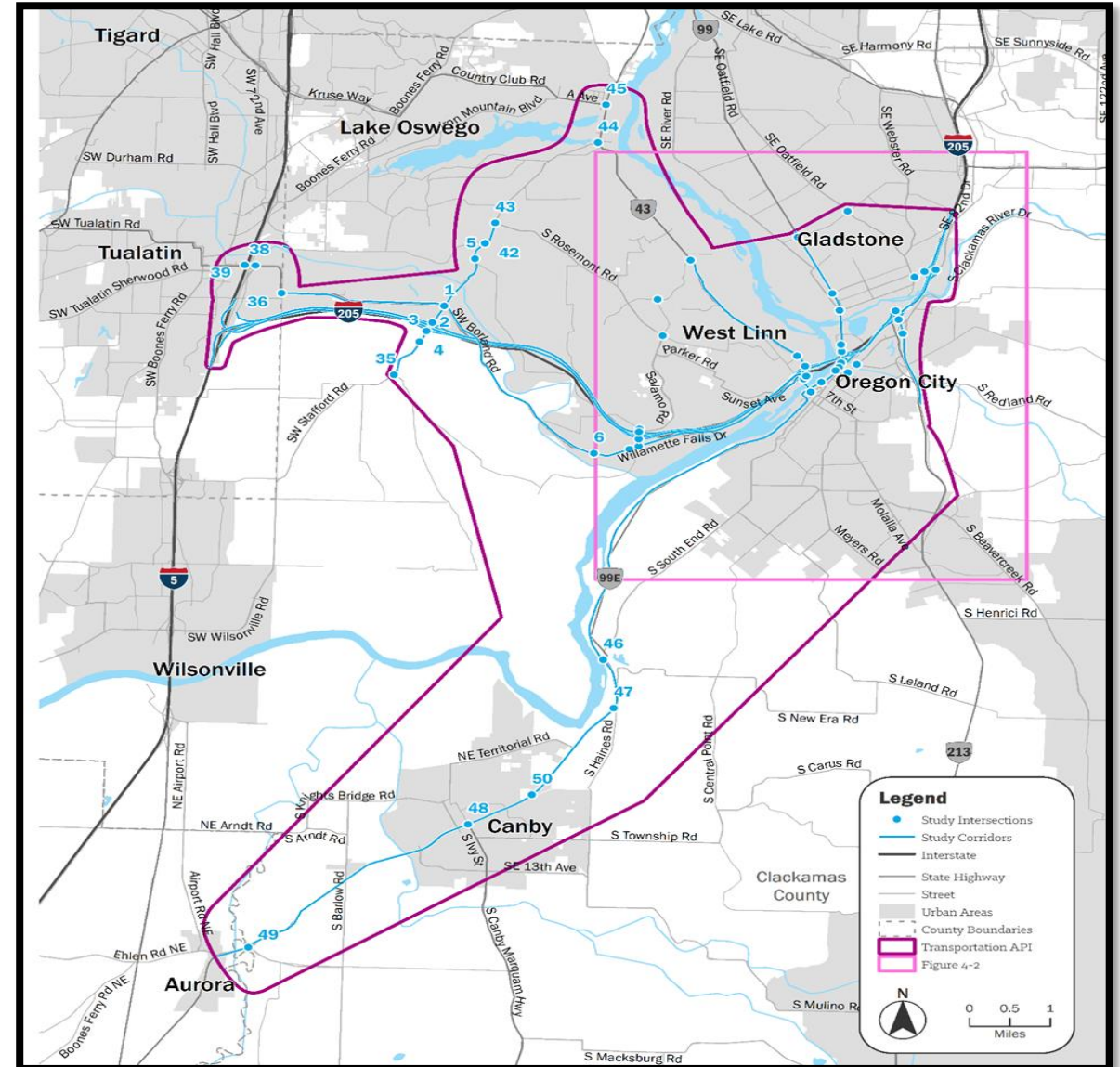
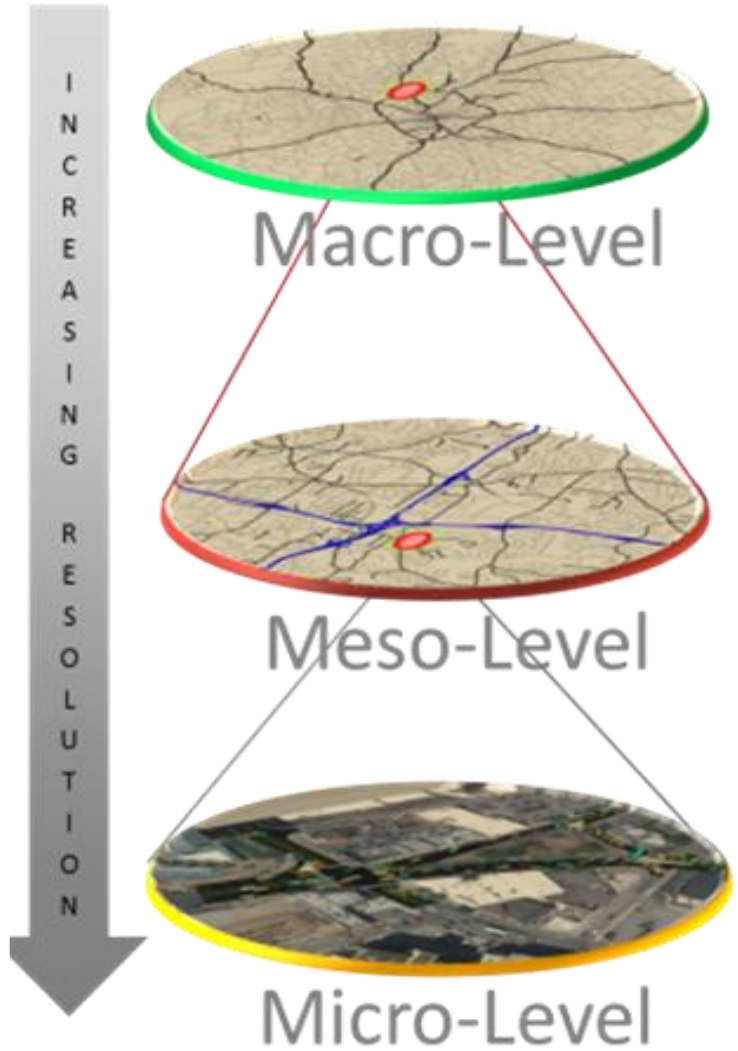
Timing: Fall 2021 – Fall 2022

- Equity and Mobility Advisory Committee
- Outreach through toll projects
- Workshops and briefings

September 15, 2022
Report back to legislature
(directed by HB3055)



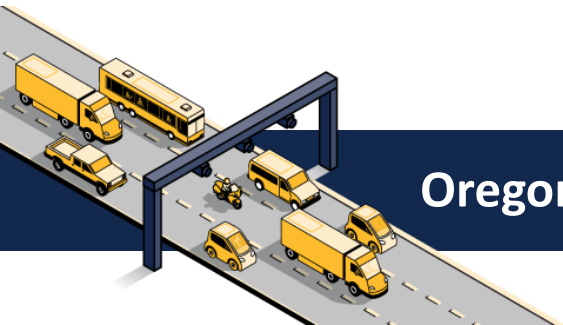
We are studying what happens to local roads



We know transportation options are limited

I-205 Toll Project: Transit & Multimodal Corridor Strategy

Purpose: Partner with transit providers to guide ODOT's commitments for transit and multimodal improvements



Please contact us with your questions

Mandy Putney, Urban Mobility Office Director of Strategic Initiatives

Mandy.Putney@odot.state.or.us
(503) 720-4843



Brendan Finn, ODOT Urban Mobility Office Director

Brendan.C.FINN@odot.state.or.us
503.348.1991



Oregon Toll Program

www.OregonTolling.org





Affordable Housing Bond Program updates and next steps

Metro Council Work Session | November 4, 2021

Agenda for today

- Update on implementation progress
- Work underway to improve program operations and outcomes
- Proposed next steps for Council action to support program outcomes
- Q/A and discussion

Progress:

New homes for people in need!

KATU 2 abc

First housing complex from 2018 Metro Affordable Housing bond opens

by Allison Mechanic, KATU Staff | Friday, September 24th 2021



BeavertonValleyTimes

Old Town Beaverton affordable housing complex ready for families

Kelcie Grega November 02 2021



'I still didn't believe it until I got the keys': Funds from 2018 Metro housing bond boost affordable housing

Progress:

Rockwood Village in Gresham



A resident gets a key to his new apartment at Rockwood Village in Gresham. Photo compliments of Hacienda CDC.

Progress:
The Mary Ann in Beaverton



Progress:

Next up: Viewfinder in Tigard



Progress:

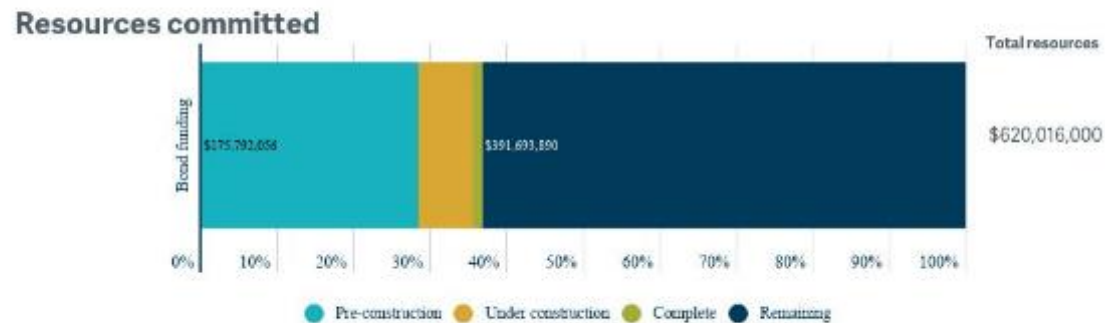
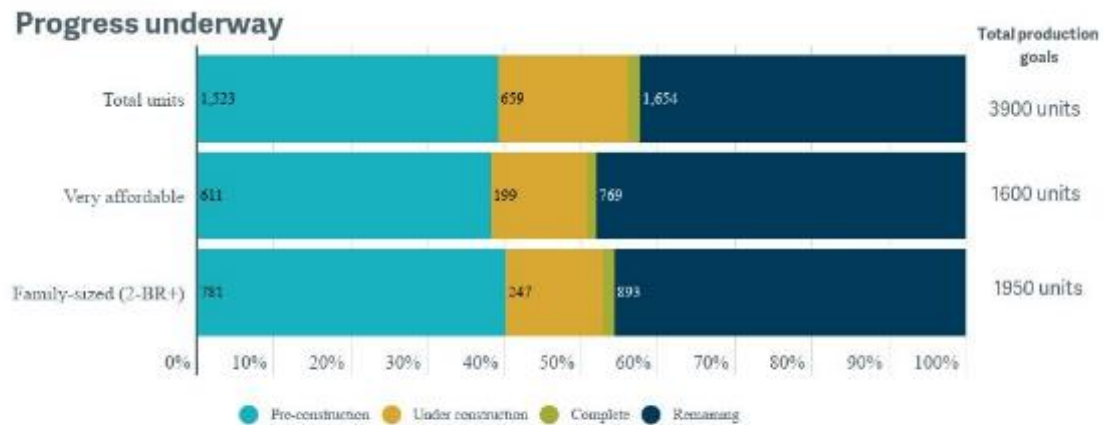
What's coming

Seven projects are currently under construction and two are open or partially open to residents.

More than 750 bond funded affordable homes will open by June 2022.



Progress: Production and resources



updated Oct 2021

Improving our program

- Continuing alignment with guiding principles
- Implementing Oversight Committee recommendations
- Auditor recommendations
- Addressing emerging challenges and opportunities



Guiding principles

Lead with racial equity.

Create opportunity for those in need.

Create opportunity throughout the region.

Ensure long-term benefits and good use of public dollars.

Improving our program Oversight Committee report

“Do more with more.”

Support integration of AHB
and SHS funding.

Invest in technical
assistance to support
workforce diversity
outcomes

Ensure capacity for success.



Improving our program

Doing more with more

Metro is working with partners to support efficient use of funds through:

- Best practices in local underwriting
- Funding alignment (federal/state/local)

Improving our program

Doing more with more

New floor for 4% Low Income Housing Tax Credits created **additional leveraged funding** across the Metro bond portfolio.

After covering cost increases, projects are responding with **additional investments in sustainability and livability.**

- Solar panels
- Packaged terminal heat pumps
- Free wi-fi
- Increased reserves

Some projects have been able to **reduce Metro bond subsidy.**

Metro is coordinating with partners to respond to challenges related to **private activity bond cap.**

Improving our program

Operational improvements

- Improvements to implementation guidelines to **increase clarity and transparency** in Metro project approval process
- Addressing gaps in metrics and procedures for **reporting and monitoring outcomes**
- **Additional staff** onboarded; work underway to balance **workloads**
- Work underway to refine **administrative cost forecast** as part of FY22 budget planning

Local Implementation Partner (LIP) implementation guidelines

Metro Affordable Housing Bond Program

October 2021



Improving our program

Economic opportunity in construction

- **Project contracting goals** range from 20% to 35% COBID participation.
- Work underway to support state/local alignment in **tracking contracting outcomes.**
- More is needed to **support workforce diversity outcomes**
 - Tracking is an important first step.
 - Construction Careers Pathways Program is expanding capacity and commitments.
- **\$120,000 in FY2022** to support local investments in expanding workforce tracking capacity for bond program
 - Funding available within current FY2022 program **budget.**



Improving our program

Future opportunities

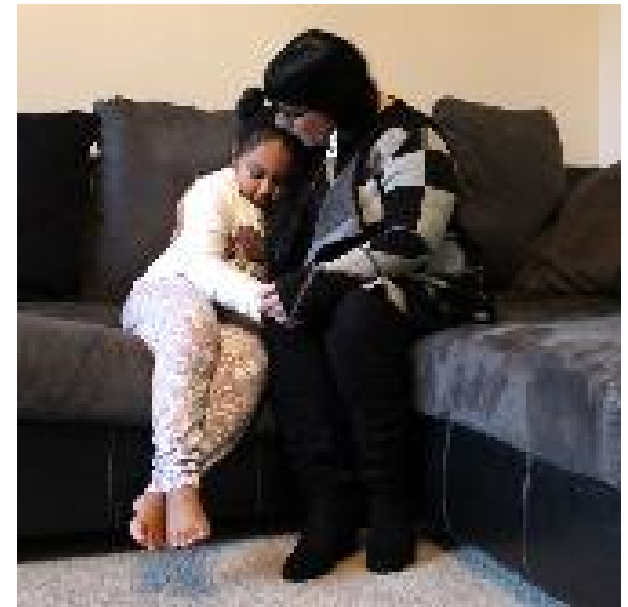
Advancing racial equity

Affirmatively furthering fair housing

- Evaluate outcomes and support best practices for fair housing marketing and lease-up

Addressing disparities in homeownership

- Working with jurisdictions to understand barriers to investing housing bond funds in affordable homeownership



Improving our program – responding to emerging needs

Climate resilience

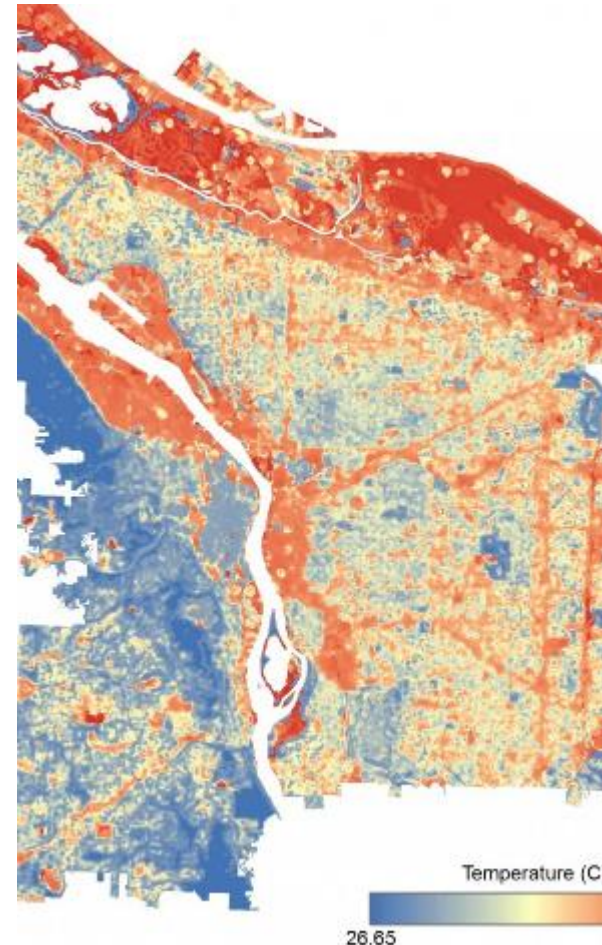
Responding to deadly heat waves

- BIPOC and low-income communities are disproportionately impacted

Strongly encouraging in-unit A/C

LIP jurisdictions can adopt requirements

Policy discussions around best practices and policy alignment



Recommendation – responding to emerging needs

Incorporate cooling plans for pipeline

Challenge: Approximately half of existing pipeline projects did not include in-unit A/C in budget.

- Some projects are under construction; others are in planning/design.

Recommendation: Provide additional funding to support A/C solutions

- Allow for a range of solutions based on specific needs and stage of development.
- Evaluate each project's financial gaps after first considering other funding sources.



Improving our program – responding to emerging needs

Integration with supportive housing

Alignment and integration with supportive housing services (SHS) program:

- Cross-communication and collaboration between oversight committees
- Partner jurisdictions are evaluating opportunities to integrate SHS funding into the housing bond pipeline
- Future opportunities for braiding funds as part of local solicitation processes



Improving our program

Integration with supportive housing



AHB funding
(capital costs)

SHS funding (ongoing costs)

Improving our program

Integration with supportive housing

	PSH units in pipeline	Anticipated completion
Portland	115	20 by Fall 2021
Washington County	136	8 by Fall 2021
Clackamas County	82	25 by Spring 2021
Gresham	30	30 by Spring 2022
Hillsboro	8	8 by Summer 2023
Beaverton	0	n/a
East Multnomah County	0	n/a
TOTAL	371	See above

Recommendation – responding to emerging needs

More Permanent Supportive Housing



Aloha Inn, Washington County

Recommendation: Designate Housing Bond funding for integrated investment in permanent supportive housing

- Braid housing bond and supportive housing services
- Create additional supportive housing units
- Prioritize rapid and low-cost solutions (e.g. “Project Turnkey”)

Investment opportunities

Housing bond interest earnings

Currently \$24 million; projected to grow to \$38 million over the life of the program

Subject to Affordable Housing Bond requirements

Recommendation:

- Designate up to \$23M for development of additional permanent supportive housing that braids AHB & SHS funding
- Authorize staff to invest up to \$10M to fill gaps for A/C upgrades in existing pipeline

Next steps for Council action

Approve work plan amendment to allocate Affordable Housing Bond interest earnings for A/C and supportive housing (*Anticipated Dec. 2021*)

Review implementation strategies for integrated investments in supportive housing (*Anticipated winter/spring 2022*)

