

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2021-26) RESOLUTION NO. 22-5234
METROPOLITAN TRANSPORTATION)
IMPROVEMENT PROGRAM (MTIP) TO ADD THE) Introduced by: Chief Operating Officer
PRELIMINARY ENGINEERING PHASE FOR ODOT'S) Marissa Madrigal in concurrence with
I-205 TOLLING PROJECT ALLOWING NEPA AND) Council President Lynn Peterson
DESIGN ACTIVITIES TO BEGIN (FB22-06-FEB))

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

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

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

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

WHEREAS, the Oregon Transportation Commission (OTC) established the Portland Metro Area Value Pricing Feasibility Analysis study which originated from the Oregon Legislature and HB21017 to explore the options available and determine how and where congestion pricing could help improve congestion on I-5 or I-205 during peak travel times; and

WHEREAS, OTC adopted the recommendations from their Public Advisory Committee during August 2018 that provided both short term initial implementation concepts and longer term phase implementation recommendations for tolling upon I-5 and I-205; and

WHEREAS, a component of the recommendations included I-205 all lane tolling from OR213 to Stafford Road as a pilot test project; and

WHEREAS, OTC approved a total of \$60 million during their March 2021 meeting in support of tolling implementation needs of which \$27,257,890 is being committed to the I-205 Variable Rate Tolling project; and

WHEREAS, ODOT has now requested Metro add the Preliminary Engineering phase for the I-205 Variable Rate Tolling pilot project to the constrain portion of the current 2018 Regional Transportation Plan; and

WHEREAS, ODOT also has submitted an MTIP formal amendment to Metro to add the PE phase for the I-205 Variable Rate Tolling Project; and

WHEREAS, approval of the formal MTIP amendment is contingent first upon approval of the RTP amendment; and

WHEREAS, the key PE phase objectives of the I-205 Variable Rate Tolling project in the MTIP are to complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd.; and

WHEREAS, RTP consistency check areas included financial/fiscal constraint verification from OTC's approval actions, and eligibility and proper use of committed funds confirm that the MTIP's financial constraint finding is maintained a result of the approval of the I-205 Variable Rate Tolling Project MTIP Formal Amendment; and

WHEREAS, a performance assessment against the RTP's four priority investment goals of congestion relief, climate, equity, and safety also is being completed with follow assessments expected to occur; and

WHEREAS, RTP adjustments and conditions do not impact the MTIP amendment's programming of the PE which allows the PE programming for the I-205 Tolling project to move forward without changes to the original proposed project programming; 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 March 4, 2022; and

WHEREAS, JPACT approved Resolution 22-5234 consisting of the I-205 Variable Rate Tolling Project Formal MTIP Amendment on March 17, 2022 and provided their approval recommendation to Metro Council; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on April 14, 2022 through Resolution 22-5234 to formally amend the 2021-26 MTIP to include the preliminary engineering phase of the new ODOT I-205 Variable Rate Tolling Project.

ADOPTED by the Metro Council this 26th day of April, 2022.



Lynn Peterson, Council President

Approved as to Form:



Carrie MacLaren, Metro Attorney

2021-2026 Metropolitan Transportation Improvement Program
 Exhibit A to Resolution 22-5234



Proposed February 2022 Formal Transition Amendment Bundle
 Amendment Type: **Formal/Full**
 Amendment #: **FB22-06-FEB**
 Total Number of Projects: 1

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Project #1 Key 22507	ODOT	I-205: OR213 - Stafford Rd Variable Rate Tolling Project	Complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd.	<u>ADD NEW PROJECT:</u> The formal MTIP amendment adds only the PE phase for ODOT's I-205 Tolling Project the 2021-26 MTIP



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

Formal Amendment
ADD NEW PROJECT
 Add the PE phase for the I-205 Tolling Project

Lead Agency: ODOT		Project Type:	Planning	ODOT Key: 22507	
Project Name: I-205: OR213 - Stafford Rd Variable Rrate Tolling Project Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.) Short Description: Complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd.	1	ODOT Type		MTIP ID: New - TBD	
		Performance Meas:	No	Status: 2	
		Capacity Enhancing:	No	Comp Date: 9/30/2025	
		Conformity Exempt:	Yes	RTP ID:	12099
		On State Hwy Sys:	I-205	RFFA ID:	N/A
		Mile Post Begin:	3.13	RFFA Cycle:	N/A
		Mile Post End:	9.50	UPWP:	No
		Length:	6.37	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 #: 21-24-1432		MTIP Amnd# JA22-06-JAN1	

Detailed Description: On I-205 in Clackamas County from approximately MP 9.50 to MP 3.13, complete required Preliminary Engineering (NEPA and design activities) for possible later tolling implementation across all through lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd

STIP Description: Complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd.

Last Amendment of Modification: None. This amendment reflects the initial programming for the project.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
ADVCON	ACPO	2022		\$ 21,806,312				\$ 21,806,312
								\$ -
							Federal Totals:	\$ 21,806,312
Federal Fund Obligations \$:			\$ -					Federal Aid ID
EA Number:								
Initial Obligation Date:								
EA End Date:								
Known Expenditures:								
State Funds								
State	Match	2022		\$ 5,451,578				\$ 5,451,578
								\$ -
							State Total:	\$ 5,451,578
Local Funds								
								\$ -
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 27,257,890	\$ -	\$ -	\$ -	\$ 27,257,890
Year of Expenditure Cost (PE Phase only):								PE Phase = \$23,534,759
Preliminary Full Project Cost Estimate:								Unknown currently
Phase Change Amounts:			\$ -	\$ 27,257,890	\$ -	\$ -	\$ -	\$ 27,257,890
Phase Change Percent:			0.00%	100.00%	0.00%	0.00%	0.00%	100.00%

Project Glossary 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.
- > The amendment adds the PE phase based on approved OTC funding
- > Main Support Materials: Submitted RTP Amendment materials
- > Status notes: Since only funding is being added for the project, the MTIP classifies the project as a planning project.

Amendment Summary:

The formal amendment to add the new PE phase project to the MTIP will start in January 2022 with the Metro Transportation Policy Alternatives Committee (TPAC). TPAC's January meeting is scheduled for January 7, 2022.

- > Will Performance Measurements Apply: No
- > Will a special RTP Goals Evaluation Assessment be completed? Yes, but limited.

RTP References:

- > RTP ID: 12099 (Draft ID)
- > RTP Description: (Draft) 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 (OR213).
- > Exemption status: (PE phase only) Exempt project per 93 CFR 126, Table 2 - Other - .Planning and Technical Studies
- > UPWP amendment: No

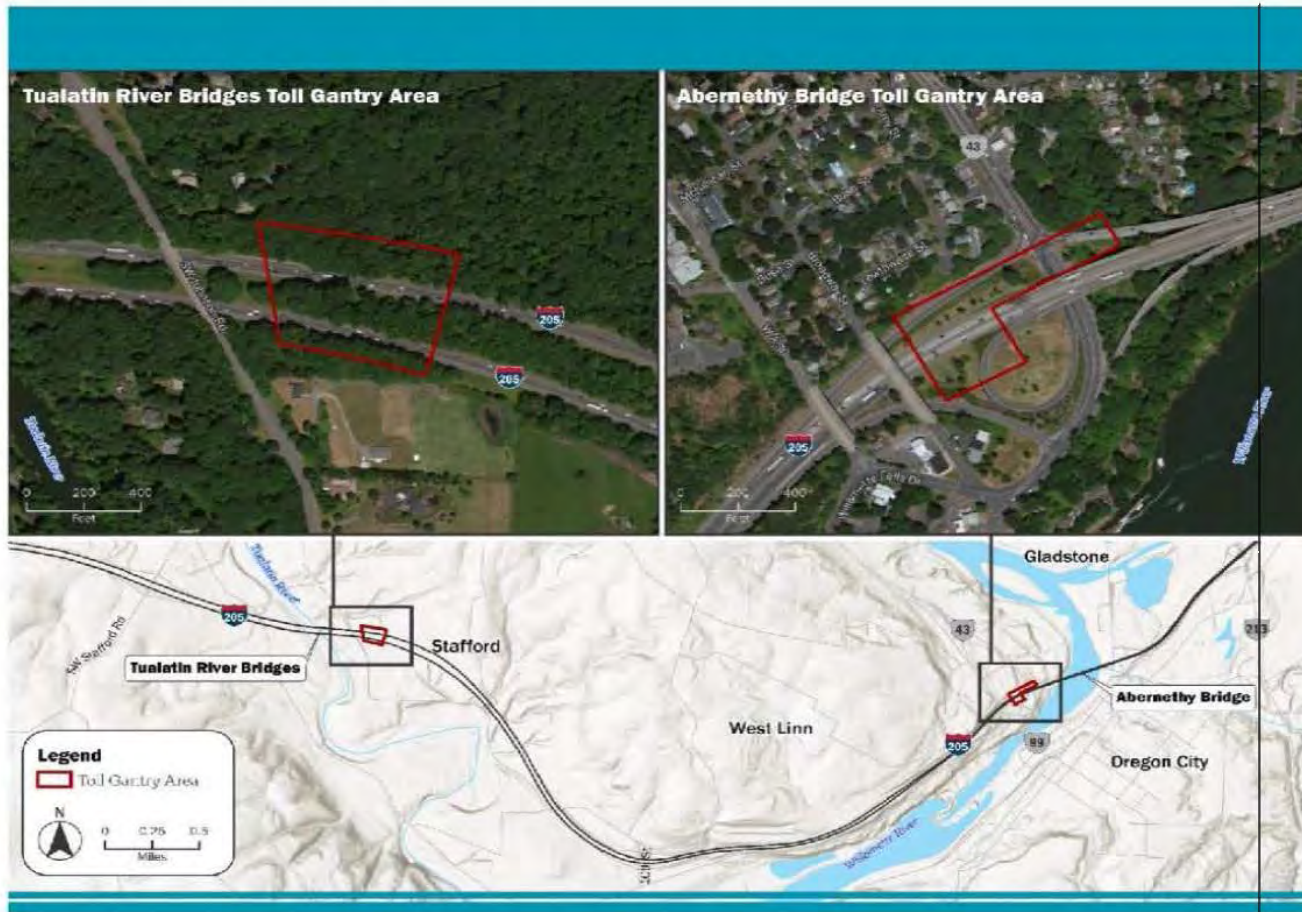
Fund Codes:

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

Other

- > On NHS: Yes. I-205 is identified as part of the Eisenhower Interstate System on the National Highway System
- > Is the project located on the Metro Modeling Network? - Yes, Motor Vehicle Modeling network
- > Model category and type: I-5 is identified as a "Throughway" in the Motor Vehicle Network
- > TCM project: No
- > Is the route located in the Congestion Management Program (CMP): Yes

Figure 8.13b I-205 Toll Project Map



I-205 Toll Project Regional Transportation Plan Amendment

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								

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

Memo

Date: March 22, 2022
To: Metro Council and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: I-205 PE Phase Tolling Project Formal Amendment & Resolution 22-5234 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF AMENDING THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO ADD THE PRELIMINARY ENGINEERING PHASE FOR ODOT'S I-205 TOLLING PROJECT ALLOWING NEPA AND DESIGN ACTIVITIES TO BEGIN (FB22-06-FEB)

BACKGROUND

What This Is:

The February 2022 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment is under Resolution 22-5234 containing ODOT's new I-205 PE phase project to be added to the MTIP. The MTIP Amendment number is FB22-06-FEB. At their February 2022 meeting, TPAC member requested the amendment be tabled until March along with the proposed Regional Transportation Plan (RTP) I-205 Tolling Project to add the PE phase to the constrained RTP. Since the RTP amendment was tabled until March, it was logical to also table the MTIP amendment.

The MTIP amendment consists of a single project to add Key 22507. The amendment proposes to add the Preliminary Engineering phase for ODOT's I-205 Tolling project to the 2021-26 MTIP. Final approval of this MTIP amendment is conditioned first by approval of the RTP amendment ODOT has submitted to add the PE phase to the current constrained portion to the 2018 RTP. The MTIP amendment is moving forward concurrently under the assumption the RTP amendment will be approved. Both amendments are being addressed as part of the March 2022 Metro approval process.

What is the official requested action of TPAC?

JPACT approved the I-205 Tolling Project formal amendment on March 17, 2022, and is now recommends Metro Council approve of Resolution 22-5234 consisting of the I-205 Tolling PE phase project.

Note: Final JPACT and Council approval for the MTIP amendment is contingent upon approval first of the I-205 Tolling PE phase RTP project amendment. TPAC also received their notification for the I-5 Tolling PE Phase RTP amendment. TPAC members modified the RTP amendment upon their approval. However, the changes do not impact the existing MTIP programming actions. The MTIP amendment can move forward and remains consistent with the RTP amendment. TPAC members approved MTIP amendment programming to move forward to JPACT without any programming modifications.

Proposed I-205 Tolling PE Phase Project Formal Amendment					
Amendment Type: Formal/Full					
Amendment #: FB22-06-FEB					
Total Number of Projects: 1					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 22507 New Project	TBD	ODOT	I-205: OR213 - Stafford Rd Variable Rate Tolling Project	Complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd.	ADD NEW PROJECT: The formal amendment adds the Preliminary Engineering phase consisting of \$27.257,890 of federal and matching funds to the FY 2021-26 MTIP

Note: The project as submitted for the RTP inclusion resulted in a draft project name and description used as part of the required 30-day public-notification process. A minor update based on the MTIP and STIP naming convention rules was accomplished for added clarity. The name and description update based on the naming convention does not represent a scope or limits change.

JPACT – March 17, 2022 Meeting Summary Notes:

Comments: Two public members provided testimony against the project. The two individuals were Chris Smith and Paul Edger. Both provided very similar comment to their TPAC testimony. Chris Smith cited an illogical funding approach and discussed the potential issues with tolling, bonding and pricing. Paul Edgar comments focused on the potential impacts of tolling upon driving patterns and the consequences upon the arterial system. He stated that the I-205 Tolling project and overall tolling concept should not progress forward unless appropriate arterial improvements also occur.

JPACT Meeting Discussion: Most of the discussion focused upon the RTP amendment and requested changes plus conditions for adoption. Much of the discussion focused on expectations for ODOT and how ODOT will comply with the proposed updated RTP amendment ordinance. Some JPACT members expressed concerns about JPACT, Metro, and the public's involvement and how would the numerous "unknowns" be resolved. Some members felt too many unknowns about the immediate project and the larger system tolling exist and additional planning is needed. At the end of the RTP discussion, JPACT members voted 10-4-2 to approve the RTP amendment with the updated conditions and terms.

Since MTIP amendment is tied directly to the status of the RTP amendment, discussion was much shorter. However, several JPACT members again took the time to express their concerns that the approach ODOT was taking was not the proper and correct choice for the region. At the end, JPACT voted to approve the MTIP amendment programming action by a 10-4-2 margin. The MTIP amendment and RTP amendment can now progress to Metro Council for final approval.

Final note: The revised conditions for the RTP amendment do not impact the MTIP Programming for the I-205 Tolling project. The I-205 Tolling project can complete MTIP programming actions without any revisions in name or description based on the updates to the RTP amendment. As before future MTIP amendments for this project will be contingent upon a positive consistency validation against the conditions identified in the RTP for the I-205 Tolling project.

TPAC - March 4, 2022 Meeting Summary Notes:

Discussion concerning the RTP amendment consumed much of the meeting. TPAC members presented motions to adjust and change the RTP amendment for improved expectations, understanding, and provide clearer roles and responsibilities for ODOT and Metro concerning future RTP amendments to add the implementation phases when they are ready. After much discussion, TPAC members voted to provide their approval recommendation to a modified RTP amendment for the I-205 PE Phase Tolling project.

Discussion then turned to the MTIP amendment which remained as original submitted to add the I-205 PE Tolling Phase PE phase with \$27 million of approved ODOT funding to the MTIP in FFY 2022. Clackamas County requested amending the MTIP amendment's programming structure to remove the design funding and limit the programming only for NEPA activities. ODOT staff raised an objection to this amendment citing that NEPA could not be completed without the design scope element and funding to support it. Upon the vote, the modification to amend the existing MTIP amendment did not pass. The amendment motion on the table returned to the original motion of adding the full PE phase (NEPA and Design) to the MTIP.

While the MTIP programming aspect can move forward without modification as it occurred with the RTP, the RTP adjustments and conditions still apply and will trump the MTIP. For the MTIP amendment with only the PE phase being programmed to be approved, two key conditions must occur. First, the project must provide proof-of funding for fiscal constraint demonstration. This has occurred by OTC action to approve funding for the project. Second, the amendment must be consistent in name, scope, and description with the project as approved in the RTP. The MTIP does not need to be described to the detailed level as in the RTP since the project is only programming the PE phase and is considered a planning project. The conditions added as part of the RTP do not appear to produce modification to the MTIP. Therefore, the MTIP amendment to add the PE phase for the I-205: OR213 - Stafford Rd Variable Rate Tolling Project can move forward for final approval without modifications.

The adjusted requirement and condition called out in the RTP amendment will impact the MTIP's project programming when the next RTP and MTIP amendments. Consistency with the RTP will be reviewed at a much closer level when the ROW, UR, or construction phases are added. TPAC members voted to approve the MTIP amendment without change or adjustments.

COMMENTS REVIEW:

TPAC March 4, 2022 Public Comment Testimony: One public member provided testimony against moving forward with the project. Paul Edger, Oregon City provided testimony against the proposed toll lanes based on the position that the toll lanes will make the region less competitive and raise costs of doing business. He explained the toll lanes will have a negative impact to the region and provided a few examples as to how the region's economic competitiveness will negatively impacted as a result of constructing the toll lanes.

30 Day Notice/Opportunity to Comment: The proposed RTP amendment received a significant number of comments primarily against the project. Because the MTIP amendment is progressing at the same time as the RTP amendment, the number of submitted MTIP amendments were not expected to be high. The 30-day public notification/opportunity to comment period was November 30, 2021 through January 6, 2022. Four email comments were received. Two were in support of the project and two were against the project. The email submission only represents one avenue of the comment process. Submitted letters to committees or to the Metro Council, or personal testimony

provided at committees and Council are gathered separately from the public notification email submission.

HOW WE GOT HERE

The preview discussions at JPACT and Metro Council concerning the I-205 Tolling project RTP and MTIP amendments resulted in a wide range of discussion, topics, and questions As a result, a short summary overview is included with the key events that led up to the submission of this MTIP amendment.

First, it is important to remember there are two are two parallel tracks in motion related to the I-205 tolling project. This includes:

- **The I-205 Widening Project in Key 22467:**
 - Project Name: I-205: I-5 – OR213 Phase 1A
 - The MTIP project description: Abernethy Bridge segment to include bridge reconstruction/widening, lane widening, roundabout at I-205/OR43 IC construction, OR99 IC reconstruction, sound walls, stormwater improvements, and various paving, signage, and landscaping.
 - The approved environmental document is an NEPA Environmental Assessment (EA)
 - The original project that focused on project development was programmed in 2016 in the 2015-2018 MTIP and STIP in **Key 19786** as shown below:

ODOT Key: 19786 | MTIP ID: 70859
I-205: Stafford Rd - OR99E - Cycle 2015-18

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2016		\$2,305,500	\$194,500		\$2,500,000	<input type="checkbox"/>
	2016	NHFP (Z460) 92.22%	\$2,305,500	\$194,500		\$2,500,000	
Totals >>			\$2,305,500	\$194,500	\$0	\$2,500,000	

NHFP funds = Federal National Highway Freight Program funds

- Preliminary Engineering and the Right-of Way phase were added in the 2018-2021 MTIP and STIP as shown below:

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

Project(s) in this cycle are not editable

Current Programming

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

Federal fund type codes:

- NHFP = Federal National Highway Freight Program funds
 - ACP0 = Federal Advance Construction funds
 - HB2001 – State funds originating from HB2001
 - Other = General local funds considered overmatch or local contribution by another agency to the project
- The proposed project improvements were split among three phases to be delivered separately as funding was secured for the project:
 - Active Traffic Management System (ATM) improvements throughout the project limits
 - Abernethy Bridge replacement/reconstruction and lane widening
 - Construction of the new third through-lane in both directions from Abernethy Bridge area west to Stafford Rd
- The original estimate for completing all phases ATMS, Abernethy Bridge portion, and 3rd lane widening) was approximately \$550 million
- Two of the three projects have been programmed in the MTIP. They are show below:
 - **ATMS in Key 21400**
 - Project status: The federal funds for this project have been obligated and implementation is well underway (if not already completed).

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ODOT Key: 21400 | MTIP ID: 71065

I-205: I-5 - OR213, Phase 3 - Cycle 2018-21

Project(s) in this cycle are not editable

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Other (explain)	2019		\$0	\$0		\$0	<input type="checkbox"/>
Construction	2019		\$5,717,640	\$482,360		\$6,200,000	<input type="checkbox"/>
	2016	ACP0 (92.22%)	\$5,717,640	\$482,360		\$6,200,000	
Totals >>			\$5,717,640	\$482,360	\$0	\$6,200,000	

Fund Type codes: ACP0 = Federal Advance Construction funds

- The Abernethy Bridge replacement/reconstruction construction phase is programmed in **Key 22467** in the current active 2021-26 MTIP as shown below:

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ODOT Key: 22467 | MTIP ID: 71251

I-205: I-5 - OR 213, Phase 1A - Cycle 2021-26

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Construction	2022		\$359,200,000	\$0	\$15,800,000	\$375,000,000	<input type="checkbox"/>
	2016	ACP0 (100%)	\$359,200,000	\$0	\$15,800,000	\$375,000,000	
Other (explain)	2022		\$0	\$0	\$350,000	\$350,000	<input type="checkbox"/>
	2006	STATE-GEN	\$0	\$0	\$350,000	\$350,000	
Totals >>			\$359,200,000	\$0	\$16,150,000	\$375,350,000	

Fund Type Codes:

- ACP0 = Federal Advance Construction funds
- State – Gen = General state funds contributing to the project above the required matching funds.

Figure 8.13a I-205 South Widening and Seismic Improvements Project Area Map

Source: ODOT

- Per ODOT, the current status for Key 22467 is the construction phase is out to bid.
- I-205 Improvements Project Summary:
 - Work on the project has been occurring since 2015.
 - The project is divided into three phases for funding and delivery purposes
 - The ATMS phase has been obligated and implemented
 - The Abernethy Bridge construction phase is out to bid currently.
 - This leaves the I-205 3rd Lane Widening portion as the remaining un-programmed and unfunded phase for the project.
 - ODOT is now proposing that a combination of HB3055 and toll revenues be used to fund the final phase.
 - ODOT proposes now to convert all lanes on I-205 from OR213 to Stafford Rd to be a toll facility.
 - ODOT has submitted a Regional Transportation Plan (RTP) amendment to add the Preliminary Engineering to the constrained 2018 RTP. Approval of the RTP amendment is pending as of January 2022.
 - As of January 2022, ODOT has requested and MTIP amendment to add the PE phase for the I-205 Tolling project. The MTIP amendment is occurring concurrently with the RTP amendment
 - Adding the I-205 Tolling project PE phase to the MTIP is contingent upon approval of the RTP amendment.

2. The second track is the I-205 Tolling Project emerging form the Congestion Value Pricing Initiative to evaluate I-5 and I-205 System Tolling Possibilities.

- ODOT initiated a planning study in 2018 to evaluate the feasibility of converting I-5 and I-205 to be toll facilities.
- The project was programmed in the 2018-2021 MTIP in Key 2371 as shown below:

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ODOT Key: 21371 | MTIP ID: 71062

I 5 and I 205: Portland Metropolitan Value Pricing Program - Cycle 2018 21

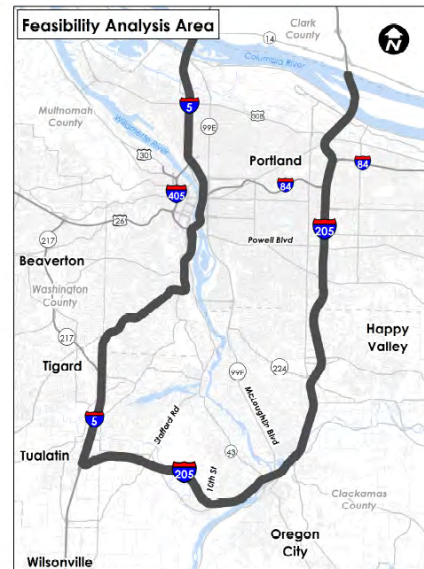
Project(s) in this cycle are not editable

Current Programming

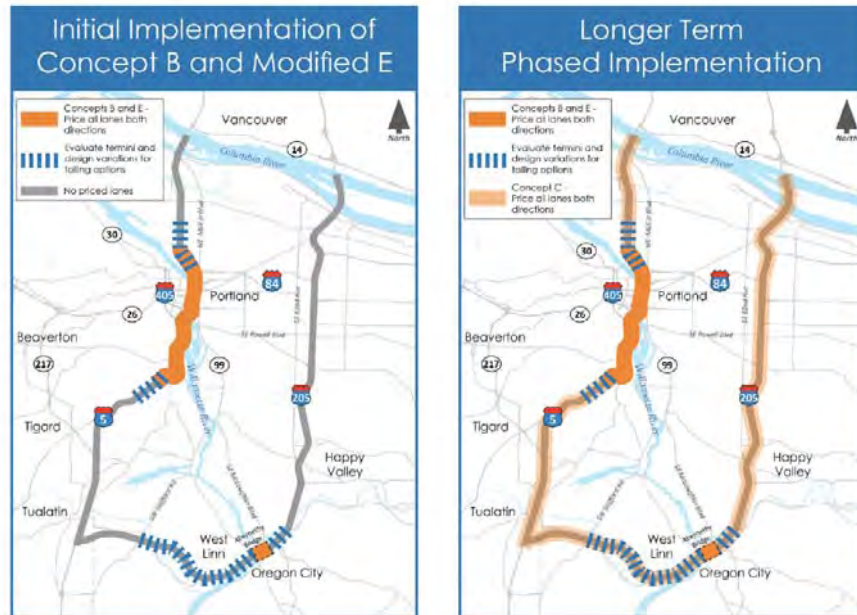
phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2019		\$2,766,600	\$233,400	\$0	\$3,000,000	<input type="checkbox"/>
	2016	ACPO (92.22%)	\$2,766,600	\$233,400	\$0	\$3,000,000	
Totals >>			\$2,766,600	\$233,400	\$0	\$3,000,000	

Fund Type Codes: ACPO = Federal Advance Construction funds

- The summary description for the Oregon Transportation Commission (OTC) approved study includes the following: The Portland Metropolitan Value Pricing Program will support analysis of traffic, diversion and community benefits and impacts, concept refinement and stakeholder engagement in preparation for the National Environmental Policy Act process in support of the potential application of market pricing (through variable tolls, variable priced lanes, area wide charges or cordon charges) to the use of roadways at different times of day.
- Metro and the City of Portland also conducted similar studies related to the Congestion Value Pricing Study.
- The study area is shown below.
- The source for the study originated from the Oregon Legislature and HB21017. As part of this legislation, the Legislature also directed the OTC to seek approval from the FHWA to implement value pricing on I-5 and I-205 in the Portland metro area to address congestion
- The Oregon Department of Transportation (ODOT) initiated the Portland Metro Area Value Pricing Feasibility Analysis to explore the options available and determine how and where congestion pricing could help improve congestion on I-5 or I-205 during peak travel times.
- In 2017, the OTC directed ODOT to convene a Policy Advisory Committee (PAC) to make a recommendation to the OTC on the implementation of Section 120 of HB 2017. The PAC met a total of six times between November 2017 and June 2018. At the first meeting, the PAC reviewed and made some modifications to the Charter, which outlines the directive from HB 2017 and clarifies the purpose of the committee, their responsibilities as committee members, priority factors for consideration, and group processes and protocols.
- The PAC Charter stated the OTC intention to “evaluate pricing options that will address congestion through one or more of the following means:
 - **Managing congestion:** Value pricing used to manage demand and encourage more efficient use of the transportation system by shifting trips to less congested times or designated lanes through pricing and/or maximizing the use of other modes to improve freeway reliability.



- **Financing bottleneck relief projects:** Value pricing used as a means to finance the construction of roadway improvements that address identified bottleneck projects that will improve the efficient movement of goods and people.” To that end, the Charter requests that the Committee provide a recommendation that will, at a minimum, address the following questions:
 - What **location(s) on I-5 and/or I-205** are best suited to implement value pricing?
 - For the recommended location(s), what **type of value pricing** should be applied?
 - What **mitigation strategies** should be pursued based on their potential to reduce the impact of value pricing on environmental justice communities or adjacent communities?
- On July 5, 2018, the PAC issued their recommendations to OTC. *(Reference Attachment 1 to the Staff Report.)*
- The PAC’s recommendations included both short term initial implementation concepts and longer term phase implementation recommendations. Tolling exhibits are shown below



- The draft Purpose and Need Statement for the project was developed as of August 16, 2021. The Purpose and Need Statement is draft and will undergo some modification as the project progresses through the NEPA process. *(Reference Attachment 2.)*
- As part of the final recommendations present to OTC, the I-205 OR213 to Stafford project was identified a possible Section 129 eligible Pilot Tolling Project
- OTC adopted the final recommendations from the Public Advisory Committee on August 16, 2018. *(Reference Attachment 3.)*

- On December 10, 2018, ODOT submitted a tolling eligibility review request to FHWA under Section 129 of Title 23 U.S.C. for Interstates I-5 and I-205 in the Portland metro region.
- On January 8, 2019, FHWA provided their reply and direction which a key portion is shown below. Note: A copy of the full letter is attached as *Attachment 4*):



Oregon Division

January 8, 2019

530 Center Street NE, Suite 420
 Salem, Oregon 97301
 503-399-5749
 Oregon.FHWA@dot.gov

In Reply Refer To:
 HDA-OR

Question 1: Eligibility and other requirements under federal tolling programs.

The report transmitted with your December 10 letter, titled *Oregon Application to FHWA: Value Pricing Feasibility Analysis and Proposed Implementation*, presents an I-205 Project (page 1-4) and an I-5 Project (page 1-6). Additional project detail is needed for a final eligibility determination by the Federal Highway Administration (FHWA), however, the I-205 Project is likely eligible for tolling under both Section 129 of Title 23, U.S.C. (Section 129) and the Value Pricing Pilot Program (VPPP), while the I-5 Project is likely eligible for tolling under the VPPP.¹

Section 129 provides authority for tolling Federal-aid highways in conjunction with construction, reconstruction, or other capital improvements to highways, bridges and tunnels. While revenue generation is commonly the driving reason for tolling under Section 129, a state may implement a time-of-day tolling (pricing) strategy under this mainstream tolling program.² Under Section 129, public agencies may impose tolls on Federal-aid highways in the following instances:

- Initial construction of a new highway, bridge, or tunnel
- Initial construction of new lanes on highways, bridges, and tunnels (including Interstates), as long as the number of toll-free lanes is not reduced
- Reconstruction or replacement of a bridge or tunnel
- Reconstruction of a highway (other than an Interstate)
- Reconstruction, restoration, or rehabilitation of an Interstate highway, as long as the number of toll-free lanes is not reduced

Therefore, under Section 129, the State of Oregon is permitted to toll all lanes of the Abernathy Bridge if the bridge is replaced or reconstructed. The state would also be permitted to toll all lanes of mainline Interstate bridges that are replaced or reconstructed as part of the project. Placing tolls on all lanes of Interstate 205 beyond the immediate approaches to replaced or reconstructed bridges, is permitted under Section 129 only if the conditions above are met, particularly, that the number of toll-free lanes is not reduced. As the OTC/ODOT develops a tolling strategy for the I-205 Project, eligibility under Section 129 will be more fully understood.

Federal law does not provide FHWA authority to approve the tolls, the specific toll rates, or exemptions, as the state owns, operates and controls these facilities. Additionally, tolling agreements are no longer required by Section 129, however, under existing implementing guidance, state departments of transportation and other public agencies responsible for toll facilities are encouraged to enter into a memorandum of understanding (MOU) with FHWA.^{3,4} An MOU can be particularly meaningful in light of requirements for audits and the use of toll revenues, and the potential consequences of noncompliance (including the discontinuation of toll collection). Typically, under Section 129 a contract for physical construction must be awarded before tolls may be collected.

- In December 2019, the Oregon Transportation Commission (OTC) approved the creation of the Equity and Mobility Advisory Committee (EMAC). EMAC's purpose was to come to an agreement or clarify what is needed to align with EMAC's Key Statements, which will be the foundation of EMAC's recommendations for advancing equity through tolling, and provide direction on next steps for the development of EMAC's recommendations to address an equitable tolling approach and advise OTC of direction for the following tasks:

- Supporting ODOT in development and implementation of an equity framework to guide project development and public engagement.
- Providing input to ODOT at the start of the technical and environmental review process to ensure project development is grounded in the equity framework, including the development and refinement of performance measures to evaluate alternatives for I-205 and I-5 tolling.
- Developing an equitable engagement plan that will result in ongoing input and participation from communities that have been historically underrepresented in transportation planning.
- Supporting the implementation of the equitable engagement plan by hosting or cohosting meetings, events and/or other activities as determined by the engagement plan.
- Providing input on mobility and equity strategies that should be considered as tolling projects are develop
- Added note: Reference to the I-205 Tolling project is now included in the overall Regional Mobility Pricing Project (congestion management), which includes I-5 stretching from near the Interstate Bridge Project to the Boone Bridge and the remainder of I-205 from Stafford Road to I-5 and OR-213 to the Glen Jackson Bridge.
- During the OTC March, 2021 meeting, the OTC approved a total of \$60 million in support of tolling needs. An updated funding letter provided to FHWA provides additional funding details supporting the tolling program (*See Attachment 5*). Specific details concerning the I-205 Tolling project in Key 22507 is shown below

Proposed STIP Description	Project design and environmental review for tolling on I-205 between Stafford Rd and OR 213.			
Summary of requested changes	<ul style="list-style-type: none"> ● Add new project for I-205 Tolling ● Allocate \$27,257,890 to Preliminary Engineering (PE) phase ● Total project cost of \$27,257,890 			
Justification	This is part of programming \$60M in funds approved by the OTC March 11, 2021 for the ODOT Tolling Program. FHWA has asked ODOT to create distinct projects for the related work programs that are planned for this funding. Also, some of the work proposed has moved from planning to design activities. This project addition is specifically for design work for I-205 Tolling.			
RTP Requirements	<p>Two RTP updates are related to this project.</p> <ul style="list-style-type: none"> ● Add project (PE) to fiscally constrained list ● Update narrative description of I-205 Improvements project to describe financial connection between the two projects <p>RTP amendments require a 45-day public notice and also must go through TPAC, JPACT, Metro Council approval path. R1 Policy & Development and the Urban Mobility Office (UMO) is the lead on this action and is working to start the process as soon as possible.</p>			
STIP/MTIP requirements	This requires a formal STIP/MTIP amendment, approval is contingent upon approval of the RTP amendment. Amendment submitted to Metro 9/7/21.			
Phase	Year		STIP Estimated Cost	
	Current	Proposed	Current	Proposed
Preliminary Engineering	N/A	2022	\$0	\$27,257,890
	Totals		\$0	\$27,257,890
Summary of Expenditure Accounts (TBD)				
Phase	Authorized	Expended	Remaining	
Preliminary Engineering	TBD	TBD	TBD	

- In late September 2021, ODOT notified Metro staff to their intent to request an RTP amendment to add the I-205 PE phase Tolling project to the current 2018 RTP. As of October 2021, the RTP amendment was underway with a proposed Metro approval process to begin during January 2022.
- As of November 2021, Metro and ODOT agreed to a concurrent processing and approval approach to complete the MTIP Amendment.

Summary I-205 Tolling Project Summary and relation to the I-205 Abernethy Bridge and 3rd Lane Widening project.

The PE phase for the I-205 Tolling project from OR213 to Stafford Rd represents a tolling test pilot project for ODOT. The Abernethy Bridge replacement/reconstruction and construction of the 3rd lane west to Stafford Rd will be funded through the use revenues obtained through HB3055 and later toll revenues for pay back purposes. Construction of the 3rd through lane on I-205 has a cleared environmental NEPA EA Record of Decision (ROD). A separate NEPA ROD is expected for the I-205 Tolling project. The overall purpose of the I-205 Tolling project will be to toll all lanes from OR 213 to Stafford Rd and act as a pilot project for the later conversion to toll lanes of Interstate 5 and 205 in the Portland Metro region.

AMENDMENT BUNDLE SUMMARY:

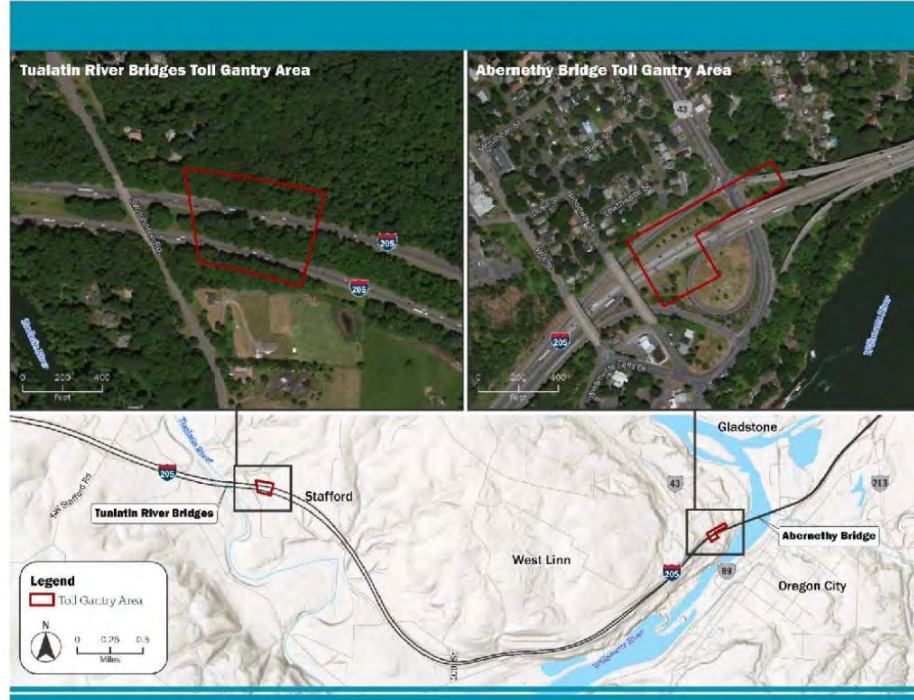
The I-205 Tolling Formal MTIP Amendment initiates project programming adjustments needed for federal fiscal Year (FFY) 2022 enabling obligation and expenditures to begin before the end of FFY 2022.

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.
- ACP0/ADVCON = Generic Advance Construction fund type code where the future federal fund code is not yet known.
- AC-NHPP = Federal Advance Construction fund type code used with the expectation that the final federal fund code will be National Highway Performance Program funds.
- ADA = Americans with Disabilities Act
- ATMS = Active Traffic Management System improvements
- 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
- HB2001 = MTIP and STIP programming fund code type representing state funds from HB2001 which is the Oregon Legislature approved Housing Choices (House Bill 2001) Legislation
- HB2017 = Oregon Legislature approved Keep Oregon Moving (HB 2017) Legislation
- HB3055 = Oregon Legislature approved Relating to transportation; and prescribing an effective date (HB3055 Legislation) and passed on September 25, 2021 with a purpose that modifies, adds and repeals laws relating to transportation.
- ITS = Intelligent Transportation System
- LPA = Locally Preferred Alternative
- MP = Mile Post limit markers on the State Highway system
- NHFP = Federal National Highway Freight Program funds
- NHPP = Federal National Highway Performance Program funds appropriated to ODOT
- NEPA = National Environmental Policy Act
- ODOT = Oregon Department of Transportation
- OTC = Oregon Transportation Commission
- PE = Preliminary Engineering
- ROD = Record of Decision
- ROW/RW = Right of Way phase

A detailed programming overview of the I-205 Tolling project provided below.

Project 1	I-205: OR213 - Stafford Rd Variable Rate Tolling Project (New Project)		
Lead Agency:	ODOT		
ODOT Key Number:	22507	MTIP ID Number:	TBD
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • <u>Quick Amendment Summary:</u> The amendment (assuming the RTP amendment is approved) will add the new PE Phase supporting the I-205 Tolling project with \$27,257,890, • <u>Metro UPWP Project:</u> No • <u>Proposed improvements:</u> Key 22507 adds only the PE phase to the I-205 Tolling project. The phase scope of work will complete design & NEPA activities for variable rate tolling implementation across all lanes to manage congestion and to raise revenue to fund construction of the I-205 improvements projects from approximately OR213 to Stafford Rd. AN overview of the scope of work as submitted b ODOT is included in <i>Attachment 6</i>. • <u>Source:</u> New project. • <u>Amendment Action:</u> Adds the new project and the PE phase to the 2021-26 MTIP. • <u>Additional Amendment Evaluation Required:</u> Yes The project is expected to complete an initial Amendment Performance Evaluation “light-version” with a later detailed version to follow. • <u>Funding:</u> The funding for the project consists of federal Advance Construction placeholder funds being programmed for obligation in FFY 2022. OTC has approved a total of \$60 million for tolling needs \$27,257,890 is being committed to this project out of the total \$60 million. • <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: On I-205 near Oregon City ○ Cross Street Limits: N/A ○ Overall Mile Post Limits: MP 9.50 to MP 3.13 		

Figure 8.13b I-205 Toll Project Map

- **Current Status Code:** 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)
- **Air Conformity/Capacity Status:**
Key 22507 with only the PE being programmed is consider a planning project for now is a non-capacity enhancing project. It is exempt from air quality conformity analysis per 40 CFR 93.126, Table 2 – Planning and Technical Studies. Once EOW and construction phase programming is proposed to be added, the project will be subject to transportation demand modeling and air conformity analysis requirements
- **Regional Significance Status:** The project is regionally significant as it contains federal funds and is located on the defined Throughway in the Metro Motor Vehicle Modeling Network. The project is part of the Eisenhower Interstate System on the National Highway System.
- **Amendment ID and Approval Estimates:**
 - STIP Amendment Number: 21-24-1432
 - MTIP Amendment Number: FB22-06-FEB
 - OTC approval required: Yes. Note OTC approval to proceed with tolling efforts occurred during their August 1, 2018 meeting
 - Metro approval date: Tentatively scheduled for April 14, 2022.

<p>What is changing?</p>	<p><u>AMENDMENT ACTION: ADD NEW PROJECT (PE PHASE ONLY):</u></p> <p>Because of the concurrent nature of the I-205 Tolling project RTP amendment and MTIP amendment, there is some confusion over the approval steps for both amendments. A concurrent approval process for an RTP amendment with the MTIP right on top of it is not the normal and usual format. As explained in prior MTIP amendments, a consistency check must occur verifying that the new MTIP project is already stated as a project in the constrained RTP. If not, the consistency check fails and the MTIP amendment can't occur.</p> <p>Presently, the I-205 Tolling project is not included in the constrained RTP. Until the RTP corrects this, no MTIP amendment can occur. To save time, the MTIP amendment is being processed concurrently with the RTP amendment for the I-205 Tolling project. The key point to remember is that the I-205 Tolling project MTIP amendment is dependent first upon approval of the RTP amendment.</p> <p>As written, the MTIP I-205 Tolling project in Key 22507 proposes an approval recommendation from TPAC members, but assumes JPACT and Metro Council first will approve the RTP amendment. As stated above, any delay to the RTP amendment will result in stopping the MTIP amendment until successful resolution of the RTP amendment issue occurs. If JPACT or Council deny the RTP amendment, the MTIP amendment automatically will stop.</p> <p>A second important point about the I-205 Tolling project and the RTP/MTIP is that the project's implementation phases (ROW, UR, and Construction) are not included in the constrained RTP. A future RTP amendment will need to occur before similar phases can be added to the project in the MTIP.</p>
<p>Additional Details:</p>	<p>None</p>
<p>Why a Formal amendment is required?</p>	<p>Adding a new project to the MTIP requires a formal amendment to be completed first.</p>
<p>Total Programmed Amount:</p>	<p>The PE phase programmed includes a total of \$27,257,890 in federal and matching funds.</p>
<p>Added Notes:</p>	<p>Six attachments are included with the Staff Report:</p> <ol style="list-style-type: none"> 1. OTC PAC Portland Metro Area Value Pricing Feasibility Analysis Final Recommendations 2. Regional Mobility Pricing Project Draft Purpose and Need statement 3. OTC August 16 2018 Tolling Action 4. FHWA January 8 2019 FHWA Reply Letter 5. ODOT Tolling Program Allocations for FHWA 6. I-205 Tolling Scope Elements

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. However, since this project is still considered a planning project, the key consistency review items include proof-of funding/fiscal constraint verification plus consistency with the RTP. The programming factors include the below items:

- 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 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.
- MPO responsibilities completion:
 - Completion of the required 30 day Public Notification period:
 - 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 I-205 Tolling Project formal MTIP amendment will include the following:

- | <u>Action</u> | <u>Target Date</u> |
|---|--------------------|
| • Initiate the required 30-day public notification process..... | November 30,2021 |
| • Completion of public notification process..... | January 6, 2022 |

- TPAC notification and approval recommendation..... March 4, 2022
- JPACT approval and recommendation to Council..... March 17, 2022
- **Metro Council approval.....April 14, 2022**

Notes:

1. The above dates are estimates. JPACT and Council meeting dates could change.
2. If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.
3. Approval of this MTIP amendment is contingent upon approval of the I-205 Tolling Project RTP amendment which must occur first.

USDOT Approval Steps (The below time line is an estimation only and assumes that the RTP amendment is approved during January 2022 as well.):

- | <u>Action</u> | <u>Target Date</u> |
|---|--------------------|
| • Final amendment package submission to ODOT & USDOT..... | April 21, 2022 |
| • USDOT clarification and final amendment approval..... | Mid May, 2022 |

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 the I-205 Tolling Project formal amendment on March 17, 2022, and is now recommends Metro Council approve of Resolution 22-5234 consisting of the I-205 Tolling PE phase project.

6 Attachments:

1. OTC PAC Portland Metro Area Value Pricing Feasibility Analysis Final Recommendations
2. Regional Mobility Pricing Project Draft Purpose and Need statement
3. OTC August 16 2018 Tolling Action
4. FHWA January 8 2019 FHWA Reply Letter
5. ODOT Tolling Program Allocations for FHWA
6. I-205 Tolling Scope Elements



Portland Metro Area Value Pricing Feasibility Analysis

FINAL

Policy Advisory Committee Recommendation to the Oregon Transportation Commission





Portland Metro Area Value Pricing Feasibility Analysis

FINAL Policy Advisory Committee Recommendation to the Oregon Transportation Commission

Prepared by:



Oregon Department of Transportation

123 NW Flanders Street
Portland, OR 97209



WSP USA, Inc.

851 SW Sixth Avenue, Suite 1600
Portland, OR, 97204

July 5, 2018

ADA

Americans with Disabilities Act (ADA) Information Materials can be provided in alternative formats: large print, Braille, cassette tape, or on computer disk for people with disabilities by calling the Office of Civil Rights (OCR) at (503) 986-3169. Persons who are deaf or hard of hearing may contact OCR through the Oregon Relay Service at 7-1-1.

Title VI

ODOT ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person on the basis of race, color, national origin, disability, or sex in the provision of benefits and services resulting from its federally assisted programs and activities. For questions regarding ODOT's Title VI Program, you may contact the Department's Title VI Coordinator at (503) 986-3169.



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List of Attachments

ATTACHMENT A: PAC Member Letters

ATTACHMENT B: PAC Charter

ATTACHMENT C: Mitigation Strategy Information

- C1. Mitigation strategy examples and themes from PAC meeting 4
- C2. Summary of PAC discussions from PAC meeting 4

ATTACHMENT D: Pricing Concept Information

- D1. Pricing concept summary sheets and themes from PAC meeting 5
- D2. Summary of PAC discussion from PAC meeting 5

ATTACHMENT E: Summary of PAC Discussion at PAC Meeting 6



Acknowledgements

Policy Advisory Committee Members

Sean O'Hollaren, Oregon Transportation Commission; PAC Co-Chair
Alando Simpson, Oregon Transportation Commission; PAC Co-Chair
Bernie Bottomly, TriMet
Tony DeFalco, Verde
Craig Dirksen, Metro Council
Phil Ditzler, Federal Highway Administration (Ex Officio)
Marie Dodds, AAA Oregon/Idaho
Matt Grumm, City of Portland
Chris Hagerbaumer, Oregon Environmental Council
Marion Haynes, Portland Business Alliance
Matt Hoffman, Kroger Co.
Jana Jarvis, Oregon Trucking Associations
Gerik Kransky, The Street Trust
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Curtis Robinhold, Port of Portland
Roy Rogers, Washington County Commission
Vivian Satterfield, OPAL Environmental Justice Oregon
Paul Savas, Clackamas County Commission
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Trey Baker, Road Usage Charging
Brent Baker, Systems Finance and Economics
Anna Dearman, Public Outreach
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Alice Sherring, PAC Facilitation Coordinator
Emma Sagor, Public Outreach
Alex Cousins, Public Outreach & Title VI and Environmental Justice Lead

DKS

Mat Dolata, Transportation Analyst

EcoNorthwest

Matthew Kitchen, Transportation Analyst
Randy Pozdena, Senior Director



Acronyms and Abbreviations

EJ	Environmental Justice
FHWA	Federal Highway Administration
HB 2017	Oregon House Bill 2017
HOT	High Occupancy Toll
HOV	High Occupancy Vehicle
LEP	Limited English Proficiency
MCE	Multi-Criteria Evaluation Tool
NEPA	National Environmental Policy Act
ODOT	Oregon Department of Transportation
OTC	Oregon Transportation Commission
PAC	Value Pricing Policy Advisory Committee
RTP	Regional Transportation Plan
SOV	Single Occupancy Vehicle



1 INTRODUCTION

This report presents the outcomes of the Policy Advisory Committee (PAC) for the Value Pricing Feasibility Analysis. This report is the result of a process that started in late 2017, shortly after passage of the transportation funding and policy package Oregon House Bill 2017 (HB 2017). The PAC recommendation is provided to support the Oregon Transportation Commission (OTC)'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 Portland metro region.

This report includes the PAC recommendation with the following elements:

1. **Context of the recommendation** – this section clarifies the purpose and intent of the recommendation in the feasibility analysis.
2. **Priority mitigation strategies** – this section addresses ways to reduce the potential impact of value pricing on affected communities.
3. **Recommended pricing concepts** – this section addresses the location and type of value pricing.
4. **PAC input on other topics** – in addition to priority recommendations requested by the OTC (2 and 3), PAC members have expressed interest in providing input on other topics.
5. **Written comment from PAC members** – each PAC member was provided the opportunity to attach individual written comments to the OTC. *These are provided in Attachment A.*

1.1 Background

In 2017, the Oregon Legislature authorized funding to improve highways, public transportation, biking and walking facilities, and use technology to make the state's transportation system work better. As part of this legislation, known as HB 2017, the Legislature also directed the OTC to seek approval from the FHWA to implement value pricing on I-5 and I-205 in the Portland metro area to address congestion.

The Oregon Department of Transportation (ODOT) initiated the Portland Metro Area Value Pricing Feasibility Analysis to explore the options available and determine how and where congestion pricing could help improve congestion on I-5 or I-205 during peak travel times. Value pricing, also known as congestion pricing or peak-period pricing, is a type of tolling in which a higher price is set for driving on a road when demand is greater, usually in the morning and evening rush hours. The goal is to provide a more reliable travel time for paying users and reduce congestion by improving traffic flow or encouraging people to travel at less congested

Study Corridors: I-5 and I-205





times or by other modes. Transit improvements typically accompany pricing programs.

The OTC directed ODOT to convene a Policy Advisory Committee (PAC) to make a recommendation to the OTC on the implementation of Section 120 of HB 2017. The PAC met a total of six times between November 2017 and June 2018. At the first meeting, the PAC reviewed and made some modifications to the Charter, which outlines the directive from HB 2017 and clarifies the purpose of the committee, their responsibilities as committee members, priority factors for consideration, and group processes and protocols. *The PAC Charter is provided in Attachment B.*

In particular, the Charter states the OTC intention to “evaluate pricing options that will address congestion through one or more of the following means:

- § **Managing congestion:** Value pricing used to manage demand and encourage more efficient use of the transportation system by shifting trips to less congested times or designated lanes through pricing and/or maximizing the use of other modes to improve freeway reliability.
- § **Financing bottleneck relief projects:** Value pricing used as a means to finance the construction of roadway improvements that address identified bottleneck projects that will improve the efficient movement of goods and people. ”

To that end, the Charter requests that the Committee provide a recommendation that will, at a minimum, address the following questions:

- § What **location(s) on I-5 and/or I-205** are best suited to implement value pricing?
- § For the recommended location(s), what **type of value pricing** should be applied?
- § What **mitigation strategies** should be pursued based on their potential to reduce the impact of value pricing on environmental justice communities or adjacent communities?

The following sections describe the process to support PAC discussions about the recommendation.

1.2 Information supporting PAC discussions

Technical analysis and concept evaluation, as well as extensive public outreach conducted for the feasibility analysis, were presented to the PAC to help inform its understanding of the viability and effectiveness of congestion pricing in the Portland metro area. All technical memoranda, public outreach summaries, fact sheets and other information prepared for the PAC can be downloaded from the project website: <http://www.oregon.gov/ODOT/Pages/Value-Pricing.aspx>.

Work to support PAC discussion included technical analysis and extensive public outreach.

1.2.1 Technical analysis: concepts and mitigation strategies for potential impacts

The technical analysis was conducted at a high level in order to establish the viability of potential pricing applications throughout the study area. The results of the analysis point to concepts that warrant additional evaluation with more refined technical analysis. For example, some of the favorable findings would need to be confirmed with more



detailed analysis, while some problem areas might be resolved through project design or other adjustments. It should be understood that tolling rates and revenue estimates developed in this analysis are for comparison purposes only and should not be relied upon as representative of any future value pricing concept.

1.2.1.1 Screening Level Analysis

The feasibility analysis included two rounds of technical evaluation. The first round of evaluation assessed the primary types of highway congestion pricing applications at a high corridor level: eight priced lane and/or priced roadway applications.¹ The purpose of this round was to provide an opportunity for shared learning about broad impacts from specific pricing concepts and their viability in the study area. As described below, some key considerations about freeway pricing applications were revealed during this stage:

- § **Priced Lane Treatments:** Priced lane treatments operate parallel to unpriced (general purpose) lanes and are not operationally feasible in areas with only two lanes (e.g., I-5 at Rose Quarter). The priced lane is typically located in the left-most lane and, as a result, it was determined that under Oregon statute, vehicles over 10,000 pounds such as freight trucks would not be allowed to travel in the priced lane.² While priced lane treatments maintain one or more unpriced “free” travel lanes, the per trip price for single lane treatments would tend to be higher when compared to priced roadways. As such, travelers using the unpriced lanes would have limited benefit, if any, from the congestion pricing. Finally, as a general order of magnitude, the priced lane treatments generate limited revenue.
- § **Priced Roadway:** Priced roadway treatments would toll all lanes in a corridor. Priced roadway treatments were found to have the highest level of congestion relief and, as a general order of magnitude, would yield the highest revenue potential. There is no unpriced or “free” option on the corridor, however, the cost per trip to travel on the priced roadway would be lower than the price per trip to travel on a priced lane treatment.

These findings informed the development of a set of refined concepts for further analysis and were presented at the third PAC meeting on February 28, 2018. After the initial round of analysis, the project team developed Concepts A through E for refined analysis (a description of the concepts is found in Attachment D). These concepts reflect the findings of technical evaluation results, input from the PAC and the public on the initial concepts, and project team experience with congestion pricing systems throughout the U.S. These refined concepts allowed for a more detailed assessment of potential impacts and benefits for defined pricing strategies and locations.

¹ Technical Memorandum 3 is available on ODOT's Value (Congestion) Pricing website: <http://www.oregon.gov/ODOT/Pages/VP-Feasibility-Analysis.aspx>

² Oregon Revised Statute 2017 Edition. Chapter 811.325.



1.2.1.2 Background Assumptions

Throughout the feasibility analysis, several regional and statewide travel demand models were used to conduct the conceptual feasibility analysis. The models included assumptions for both future land use patterns and future transportation system conditions. The reason the concepts were analyzed under future conditions was to ensure the concepts address congestion problems into the future. For the feasibility analysis, the 700+ roadway, public transportation and active transportation projects identified through 2027 in the 2018 Regional Transportation Plan update were assumed to be constructed.

1.2.2 Public outreach

An extensive public outreach program was implemented as part of the feasibility analysis. In total, eight in-person community conversations were held throughout the Portland metro area which attracted over 440 in-person attendees. Winter and spring online open houses were held that attracted over 13,000 visitors. A successful effort was made to bring environmental justice and Title VI perspectives into the conversation through discussion and focus groups. A summary of the public outreach efforts, attendance and responses is provided in Table 1-1.

Table 1-1. Congestion pricing feasibility analysis public outreach by the numbers

	Total Reach
Online open house visitors	13,260
In-person open house attendees	446
Completed questionnaires	2,586 Including 286 Title VI/EJ
Video views	24,553
Email/voice mail comments	1,278
Focused Outreach	
Title VI/EJ discussion group attendees	114
DHM Research focus group attendees	37 Including 17 Title VI/EJ
Group presentations (events)	49

Public comment was summarized and provided to PAC members throughout the study process. To a considerable extent, input from the public was consistent with the main themes heard from the PAC.



2 PAC RECOMMENDATION TO THE OTC

In forming the PAC, the OTC very deliberately sought to bring together stakeholders representing diverse interests. Throughout this process, the project team has sought to find common ground. At the same time, shared positions should not compromise the unique values and concerns of individual members. As such, all PAC members were invited to share written comments with the OTC. *These are provided without edit in Attachment A.*

The recommendation to the OTC responds to the OTC's priority request as described in the PAC Charter to identify the locations on I-5 and/or I-205 that are best suited for value pricing; the type of value pricing that should be applied; and, the mitigation strategies that should be pursued to reduce impacts on environmental justice and adjacent communities. These are identified in sections 2.2 and 2.3. In addition, Section 2.4 identifies other topics identified by the PAC that members believe should advance for consideration in the development of a pricing program on I-5 and I-205 in the Portland metro area.

At the fifth PAC meeting (May 14, 2018), committee members reviewed the consultant team recommendation, which included congestion pricing concepts, mitigation strategies for potential impacts and other topics for consideration.³ Feedback on the consultant team recommendation was solicited and incorporated into the recommendation presented in this section. Three of the four components of the recommendation to the OTC are addressed below, including:

- § Priority mitigation strategies
- § Recommended pricing concepts
- § PAC input on other topics

2.1 Context of the recommendation

The recommendation to the OTC identifies the pricing concepts that warrant further consideration under a formal National Environmental Protection Act (NEPA) process, along with mitigation strategies and other priority policy issues identified by the PAC. This recommendation is made based on an understanding of the purpose and nature of the recommendation in context of the legislative direction, federal regulatory environment, and request from the OTC:

- § The Legislature requires the OTC to submit a value pricing proposal to FHWA by Dec. 31, 2018. The PAC recommendation is advisory to the OTC.

³ For more information on the consultant team recommendations, please refer to *Technical Memorandum 4: Round 2 Concept Evaluation*, available on the ODOT Value Pricing website here:

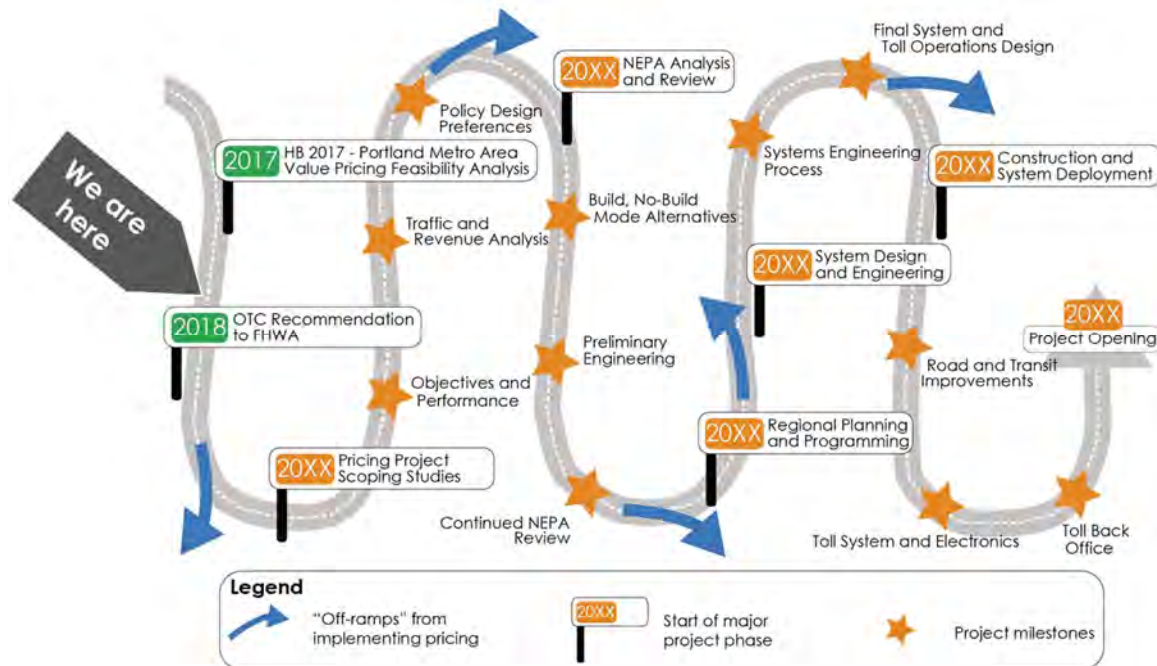
http://www.oregon.gov/ODOT/Value%20Pricing%20PAC/TechnicalMemo4_Evaluation.pdf. A video recording of PAC meeting #5 can be viewed here: <https://www.youtube.com/watch?v=4jYK4O80T9o&feature=youtu.be>.



- § While the feasibility analysis has sought to find common priorities and reflect a shared recommendation, the OTC does not require a consensus recommendation; minority opinions may also be expressed.
- § This recommendation identifies general priority mitigation strategies. Once projects are identified for further planning, more work will be needed to develop specific mitigation strategies and implementation plans that pertain to specific pricing concepts.
- § Further planning, analysis, and engagement will be conducted before tolling would be implemented.

The feasibility analysis is the first step of many toward implementation of a pricing program. The complexity of implementing congestion pricing is depicted on the roadmap figure below (Figure 2-1). The image reflects the multi-year process that would be required before pricing can be implemented, including several key decision points, or “off ramps,” depending on the outcome of each phase.

Figure 2-1. Roadmap to implementing value pricing



As reflected in Figure 2-1, the next step for ODOT and the OTC is submission of the OTC’s value pricing proposal to FHWA by the end of 2018 as directed by the Oregon Legislature. Feedback from FHWA would provide direction for pricing project scoping studies. These further steps are expected to include:

- § **Policy design preferences** – As part of a more comprehensive policy development and policy design process, ODOT and the OTC will, in cooperation with regional stakeholders and partner agencies, articulate preferred pricing policies for the system such as price caps/floors, discounts, vehicle prohibitions, and transponder requirements. Formal policies will also define the user groups for the system and specifically those that may be subject to mitigation. With the



identification of special user groups, ODOT and its partners can also begin developing mitigation strategies such as the potential for low income participation programs.

- § **Objectives and performance** – The development of more formalized policies allows for the articulation of system goals, objectives and associated performance metrics. Metrics should be empirically based and linked to goals and objectives such that the system can be evaluated and its performance demonstrated to the public and regional stakeholders. While it is likely that travel speeds and travel time savings will be a primary metric (as with other pricing systems in the U.S.), it is likely that other metrics will be needed, which could include public transportation utilization, active transportation, environmental justice, or other community impact metrics.
- § **Traffic and revenue analysis** – With further development of policies and performance metrics, ODOT will complete a more detailed traffic and revenue study of the recommended pricing concept(s). This process will provide significantly more detailed information on critical issues identified during the assessment study, including investment grade analysis on revenue potential based on detailed land use data and regional travel trends, as well as a more detailed assessment of where diversion may occur.

These steps will inform further environmental study to satisfy the National Environmental Policy Act (NEPA) requirements, including identifying potential negative impacts of pricing and strategies to avoid, minimize, and mitigate them. Additional community outreach will be part of the anticipated NEPA work expected to be undertaken prior to project implementation.

2.1.1 Future monitoring and reporting

Performance monitoring and management programs are required under the federal pricing statutes. Agencies authorized to price roadways under the Federal Value Pricing Pilot Program are required to submit quarterly reports to evaluate and demonstrate the effectiveness of pricing. Depending on the objectives of the project, the agency may report on changes in travel speeds, travel times, public transportation utilization, active transportation, environmental justice and community impacts, or other performance metrics. Agencies authorized to price under U.S. Title 23, Section 129 are required to undergo annual audits to ensure revenues are spent in an appropriate manner.

2.2 Priority mitigation strategies

The objective of the feasibility analysis was to identify options to improve traffic congestion in order to improve overall mobility in the region. The discussion of mitigation included strategies to share the benefits among the broadest possible cross-section of the community and also to minimize negative impacts either through design or off-setting programs and investments. Throughout the feasibility analysis process, discussions with the public and the PAC identified common concerns about congestion pricing. The project team provided examples of strategies that have been used in congestion pricing projects in other areas.



The fourth PAC meeting (April 11, 2018) included a small-group work session on mitigation strategies. PAC members worked in facilitated groups to talk to and hear from each other about strategies to ensure that congestion pricing can be implemented in a way that is the right fit for their communities and constituents. They discussed concerns about impacts on environmental justice populations and adjacent communities, and included examples of strategies that have been used elsewhere. At the sixth PAC meeting (June 25, 2018), PAC members from Washington state requested a bi-state approach to developing mitigation strategies and the need to identify regulatory barriers early in the process.

The mitigation priorities identified by the PAC are described below. *More information about the mitigation strategies as discussed during the April 11 PAC work session is included in Attachment C*, including the notes from the workshop table discussions.

Recommended mitigation strategy: improved public transportation and other transportation options are essential strategies for equity and mobility

The importance of providing additional public transportation options was clearly expressed by PAC members and is consistent with the priorities expressed in public input. Public transportation and other viable options are needed to improve mobility for communities that will be affected by pricing. Most pricing projects throughout the country have included investments in increased public transportation, carpool/vanpool, and active transportation alternatives. The exact types and locations of public transportation improvements included will be developed as part of future project development. At the sixth PAC meeting (June 25, 2018), the PAC discussed the importance of public transportation as a foundational element of any pricing program moving forward.

Recommended mitigation strategy: special provisions are needed for environmental justice populations, including low income communities

Impacts to environmental justice communities, with an emphasis on low-income populations, regardless of state of residence has been one of the most common concerns heard from the public and PAC members. It is important that congestion pricing provide benefits and be accessible to a broad cross-section of the community. Where negative impacts do occur, it is a priority to develop strategies to mitigate those impacts.

Recommended mitigation strategy: diversion strategies should be incorporated to minimize and mitigate negative impacts

Diversion occurs when motor vehicle traffic shifts from one roadway to another, to another mode of travel such as public transportation, or to other times of day. Diversion to “surface street” routes was frequently mentioned by the PAC and members of the public as an area of concern. Future studies would look more closely at diversion and safety on impacted and/or parallel routes and modes. Diversion can take many forms, some of which are desired outcomes of congestion pricing:

- § Diversion from local system to the freeways is drawing vehicles back to the freeway that currently are diverting onto the local and arterial road network.
- § Diversion of mode or travel time reflects trips shifting to different modes or times of day.



- § Diversion balancing between I-5 and I-205; currently, ODOT manages this balance via variable message signs and other tools.
- § Diversion to the surface street system is through traffic diverting onto the local and arterial road network.

Deliberations at the June 25 PAC meeting produced the following results:

Most PAC members support or accept more fully developing these mitigation strategies as part of congestion pricing planning.

PAC Action:

- § Support: 15
- § Accept: 3
- § Oppose: 0

See Attachment E for details on the PAC conversation at the sixth PAC meeting held on June 25, 2018.

2.3 Recommended pricing concepts

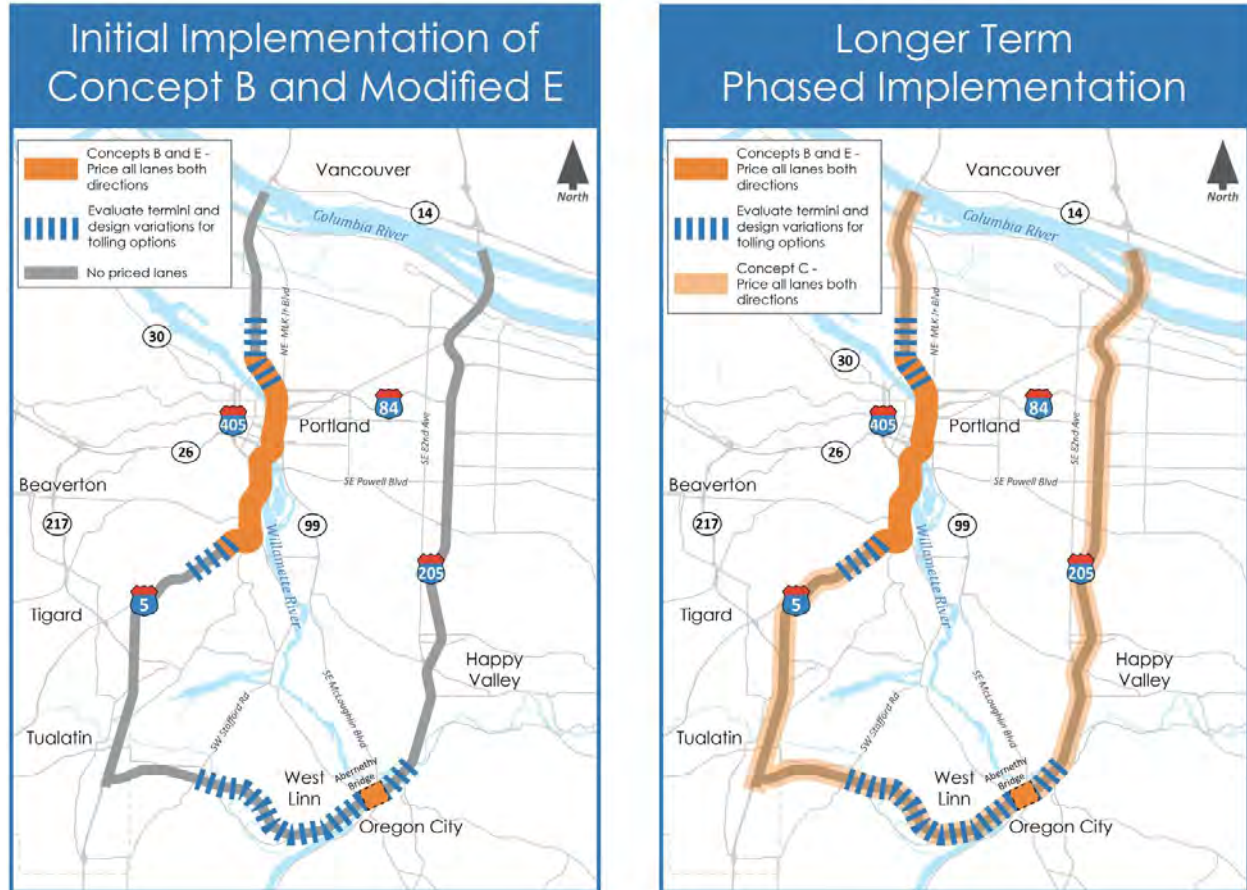
The recommendation regarding pricing concepts identifies pricing programs that warrant further traffic, revenue, and environmental analysis. The PAC recommendation to the OTC is presented in Figure 2-2 below, followed by descriptions of the PAC majority and minority positions. More information about each of the five concepts is provided in *Attachment D*, along with a summary of PAC comments.

As shown, the recommendation is framed in two tiers:

- § **Initial pricing pilot program:** There are multiple benefits to implementing pricing as a pilot program:
 - Allows heavily congested areas to be addressed more quickly than if implementation waited for development of the entire system.
 - Allows for evaluation of equipment, communications and/or software and for potentially identifying beneficial system improvements prior to a more comprehensive deployment.
 - Allows the public to become accustomed to the system before it is deployed more broadly.
 - Provides an opportunity to understand how traffic will react in actual use, and thereby better tune the algorithms and understand diversion if it occurs.
 - Provides the tolling authority the ability to end the program if it does not provide the results anticipated.
- § **Longer term vision:** There is considerable interest regionally in conducting a more comprehensive evaluation of how congestion pricing can manage congestion on all the Portland metro area highways, in addition to I-5 and I-205. Therefore, the recommendation includes conducting a longer term pricing study to consider a more comprehensive implementation of pricing pending success with the initial pricing pilot program.



Figure 2-2. PAC recommendation to the OTC



Recommended Initial Pricing Pilot Program

The PAC recommendation includes advancing projects for further study on both I-5 and I-205 to effectively manage north-south travel through the metro area. Both projects could provide congestion relief and, potentially, funding for planned projects and mitigation strategies. The recommended initial pilot pricing projects are described below.

- § Conversion of all I-5 lanes to a priced roadway between NE Going Street/Alberta Street and SW Multnomah Boulevard (Concept B) is recommended as a pilot project. Exact termini of the pricing application would be developed as part of future analysis. The evaluation indicates this concept would reduce congestion and provide travel time savings for users within one of the most severely congested corridors in the Portland metro area. Because this concept would implement pricing on currently unpriced lanes, it would require approval under the FHWA Value Pricing Pilot Program. The project would be implemented as a pilot project, with requirements for regular performance monitoring to ensure that the project effectively improves traffic conditions and make adjustments accordingly.



- § Implement a toll on or near the Abernethy Bridge for congestion relief, including as a potential funding strategy, for the planned Abernethy Bridge reconstruction and widening, and construction of a planned third lane on I-205 between 99E and Stafford Road (Concept E). Exact termini of the pricing application would be developed as part of future analysis. Future analysis will include design variations that may extend pricing north and south of the bridge itself, incorporating areas covered in Concept D, to better evaluate revenue potential and overall traffic congestion impacts, including diversion. Due to the reconstruction aspect of this project, it may be eligible under the Title 23 Section 129 Mainline tolling program, or the Value Pricing Pilot Program.

Recommended Longer Term Pricing Program

If the initial pilot program is determined to be a success, broader regional implementation of congestion pricing is recommended in conjunction with more comprehensive system-wide pricing evaluation and planning. **The recommendation is to advance study of a broader implementation of pricing on I-5 and I-205, considering all Portland area highways, concurrent with the initial pilot program deployment.**

- § The feasibility analysis included roadway pricing on all of I-5 and I-205 in the study area as Concept C, which was shown to produce the highest degree of potential congestion reduction as well as generating significant revenue to support mitigations and other transportation investments, but also the greatest need for mitigation and diversion strategies. Further consideration is recommended for this concept, including appropriate project phasing, accompanying transportation improvements, and desirable policies and support elements. This could provide an opportunity for additional system-wide analysis.

Minority Recommended Initial Pricing Program

There was strong interest from several PAC members in advancing further study of Concept C as the recommendation for pricing in the Portland metro region. These members emphasized the broad benefits of Concept C shown in the technical analysis. Some PAC members wanted to implement Concept C as the initial concept; others thought that it was the right vision for the region to work towards informed by the initial pilot projects. Positions of individual PAC members and their represented agencies or organizations are provided in *Attachment A, PAC Member Letters*.



Deliberations at the June 25 PAC meeting produced the following results:

Most PAC members support/accept advancing pricing projects (concepts B and modified E) on both I-5 and I-205 as a pilot for further study.

PAC Action:

- § Support: 10
- § Accept: 6
- § Oppose: 2

Most PAC members support/accept advancing the two-tier approach, which starts with two smaller pilot projects (concepts B and modified E) and includes a larger scale phased implementation on I-5 and I-205 (concept C plus looking at the broader system).

PAC Action:

- § Support: 9
- § Accept: 4
- § Oppose: 5

Several PAC members support implementing Concept C as the initial pricing implementation.

PAC Action:

- § Support: 8
- § Accept: 1
- § Oppose: 8

See Attachment E for details on the PAC conversation at the sixth PAC meeting held on June 25, 2018.

2.4 PAC input on other topics

The preceding pages summarize the recommendation for the location and type of pricing concepts and the mitigation strategies to minimize impacts on environmental justice communities and adjacent communities. These were identified in the Charter as the priority recommendations being sought from the PAC.

In addition to the pricing concept and priority mitigation recommendation, a few themes were raised throughout the process by members of the PAC and the public. The most common shared themes are presented below.

PAC input: conduct system-wide pricing analysis

HB 2017 directed the OTC to focus on I-5 and I-205, but does not preclude examining pricing on other freeways. Several PAC members and members of the public believe there is a need to examine the regional freeway system. Multiple PAC members indicated they would support a larger system-wide (beyond I-5 and I-205) congestion pricing strategy for the Portland metro area:



- § Other critical freeways in the Portland region, including I-84, I-405, US 26, and Hwy 217
- § Critical bottlenecks in the freeway system, including the Interstate Bridge, the Boone Bridge, and the I-205 approach to the Glenn Jackson Bridge

Deliberations at the June 25 PAC meeting produced the following results:

PAC members support/accept further system-wide feasibility analysis with regional partners of potential pricing applications on the regional freeway system.

PAC Action:

- § Support: 10
- § Accept: 6
- § Oppose: 2

See Attachment E for details on the PAC conversation at the sixth PAC meeting held on June 25, 2018.

PAC input: plan for adding capacity to accommodate future growth

There are strong views about the need to plan for population and employment growth in the region by providing new capacity on roadways, public transportation and active transportation systems. Some PAC members asked that future feasibility and policy development inform how future multi-modal capacity could be added in the context of a congestion pricing environment.

PAC members encourage the OTC to consider:

- § As the region grows, we need to plan to accommodate growth in a congestion pricing environment
- § Mobility for a growing region should consider adding capacity for roadways and public transportation

Deliberations at the June 25 PAC meeting produced the following results:

Most PAC members support/accept the OTC developing a plan for future roadway and public transportation capacity increases in a congestion pricing environment.

PAC Action:

- § Support: 7
- § Accept: 8
- § Oppose: 1
- § Abstain: 2

See Attachment E for details on the PAC conversation at the sixth PAC meeting held on June 25, 2018.



PAC input: revenues from I-5 and I-205 freeway pricing should be used for congestion relief within the region

- § HB 2017 Section 120 establishes a Congestion Relief Fund for revenues from freeway tolling. PAC members have expressed that revenue should be used to provide benefits within the region where revenues are collected. PAC members individually expressed a range of opinions about how revenue should be spent. Positions of individual PAC members and their represented agencies or organizations are provided in *Attachment A, PAC Member Letters*.

Deliberations at the June 25 PAC meeting produced the following results:

Most PAC members support/accept the OTC using revenues from freeway tolling to provide benefits within the region where revenues are collected, for congestion relief.

PAC Action:

- § Support: 11
- § Accept: 5
- § Oppose: 2

See Attachment E for details on the PAC conversation at the PAC meeting #6 on June 25, 2018.

2.5 PAC member written comment

Representation of PAC member views

This report was prepared by ODOT staff and the WSP project team to represent the overall recommendation of the PAC as a group. To the greatest extent, the team has sought to accurately and fairly represent the range of views expressed during this process. As noted in the PAC Charter, there was not a requirement for the PAC to achieve consensus. That said, many areas of shared values and priorities were identified through this process. This document seeks to identify the shared views as well as the range of perspectives.

In order to ensure that each PAC member had an opportunity to clearly express the views and priorities of themselves and their constituencies, PAC members were invited to provide written comment for inclusion - without edit - in this report. These are provided in Attachment A.



3 PAC MATERIALS

Several technical memoranda, public engagement reports, and other related materials were provided to support and inform the PAC in their recommendation process. These include the following:

- § Technical Memorandum #1 – Objectives and Proposed Performance Measures (December 15, 2017)
- § Technical Memorandum #2 – Initial Value Pricing Concepts (January 23, 2018)
- § Technical Memorandum #3 – Round 1 Concept Evaluation and Recommendations (February 20, 2018)
- § Technical Memorandum #4 – Round 2 Concept Evaluation (May 7, 2018)
- § Draft Value Pricing Summary of Relevant Policies (April 4, 2018)
- § Congestion Pricing Mitigation and Related Policy Considerations (May 7, 2018)
- § Winter 2017-2018 Community Engagement Summary Report (February 21, 2018)
- § Title VI/Environmental Justice Engagement Summary Report (April 4, 2018)
- § Spring 2018 Community Engagement Summary Report (May 11, 2018)
- § Cambridge Systematics, Inc. Report: Tolling Impacts and Mitigation Strategies for Environmental Justice Communities (September 30, 2017)
- § FHWA: Income-Based Equity Impacts of Congestion Pricing (December 2008)



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ATTACHMENT A: PAC MEMBER LETTERS

Individual organization letters include:

- § AAA Oregon/Idaho, Marie Dodds
- § Clackamas County, Commissioner Paul Savas
- § Clark County Council
- § Multnomah County, Commissioner Jessica Vega Pederson
- § Oregon Environmental Council, Chris Hagerbaumer
- § Oregon Trucking Associations, Jana Jarvis
- § Port of Portland, Curtis Robinhold
- § City of Portland, Mayor Ted Wheeler and City Council
- § Ride Connection, Park Woodworth
- § TriMet, Bernie Bottomly
- § City of Vancouver, Mayor Anne McEnery and City Council
- § Washington County, Commissioner Roy Rogers

Joint organization letters include:

- § Verde, OPAL Environmental Justice Oregon, The Street Trust
- § Metro, The Street Trust, Multnomah County, TriMet, Oregon Environmental Council, OPAL Environmental Justice Oregon, Verde, Portland Bureau of Transportation



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AAA Oregon/Idaho
600 SW Market St.
Portland, OR 97201



KEEP
LIFE
GOING™

June 28, 2018

Chair Tammy Baney
Oregon Transportation Commission
Oregon Department of Transportation
355 Capitol St. NE
Salem, OR 97301-3871

Dear Chair Baney and members of the Oregon Transportation Committee:

I appreciate the opportunity to have served on the ODOT Value Pricing Feasibility Analysis Policy Advisory Committee along with Commissioner Alando Simpson and Commissioner Sean O'Hollaren. I'd like to share some additional comments with the OTC.

AAA has been an advocate for travelers since being founded nationally back in 1902 and in Oregon in 1905. Transportation funding was one of our earliest goals. At the turn of the century, existing roads had been designed for the horse and buggy, not the car. AAA's earliest effort was to fight for road improvements and by 1916, AAA won a major battle when the principle of federal aid to highways was initiated.

AAA realizes that tolling is a tool in transportation funding. While we prefer a toll-free system, tolls can be used in certain circumstances, such as paying for needed new capacity and improving existing capacity when the new capacity or improvements cannot be fully financed through other means. Tolls or pricing can also be used to operate express lanes that improve traffic flow on the highway system.

Where tolls are utilized, AAA believes that reasonable alternative toll-free routes and/or lanes should always be available. We believe all transportation funding mechanisms should be evaluated to ensure revenue is being allocated and effectively used for transportation projects that maintain or improve road infrastructure, mobility and safety.

AAA urges that resources be devoted to improving the capacity and operation of highways and streets; and technological contributions that enhance mobility.

Adding tolls on existing capacity may be considered when no other funding option is practical to make necessary and beneficial improvements to a highway corridor. Such proposals must be very carefully evaluated by state and local government officials with thorough opportunities for stakeholder feedback. In addition, a comprehensive cost-benefit evaluation must be completed to ensure that drivers will receive adequate value in terms of better road conditions, safety, and/or mobility by adding tolls. Improvements can include highway reconstruction, rehabilitation, and expansion.

Any review of a toll project on existing capacity should take into account socioeconomic factors to ensure vulnerable populations are not adversely impacted. Approved projects must deliver improved road conditions, traffic flow, accessibility and implementation of electronic tolling technology. Tolls should only be used for, and imposed after completion of planned improvements, or through a strict

financing plan that ensures all toll revenues will be used in a timely manner and exclusively for the planned improvements.

Tolling of existing capacity should not be used to discourage driving, change travel behavior, or generate revenue for purposes other than the necessary and beneficial improvement and maintenance of safe mobility on the tolled corridor. AAA believes that congestion pricing, when it is imposed on all road users to discourage the use of automobiles during peak traffic periods, is not an appropriate transportation policy.

We have some concerns with options presented at the PAC meetings. Concept B would toll all lanes of I-5 in Portland between S.W. Multnomah Blvd. and N. Going St. This means there would be no toll-free freeway options; rather, drivers would have to take surface streets with the potential to cause significant congestion and disruption in neighborhoods. There doesn't seem to be an understanding of the level of diversion and the impact it would have in the area.

The longer term implementation is Concept C, which would toll all lanes of I-5 and I-205 in the Portland area. Again, AAA is concerned about the lack of toll-free freeway options, and the impact of diversion.

We will want to ensure that drivers receive benefits for the increased costs they will pay in tolls in the form of improved safety, mobility and road conditions.

Another major concern for AAA would be any efforts to bust or circumvent the Oregon highway trust fund. As you know, Article IX, Section III of the Oregon Constitution basically says that all taxes and fees paid by motorists have to be used to pay for Oregon's roads, highways, bridges and roadside safety rest areas.

Thank you for consideration of these comments and for the opportunity to serve on the PAC.

Respectfully,



Marie Dodds
Director of Government and Public Affairs
AAA Oregon/Idaho

6-29-2018

Value Pricing & Tolling Comments & Recommendations

Summary statement from PAC member Paul Savas, Clackamas County Commissioner

Value Pricing Committee members,

I appreciate the good work thus far by the staff and committee members. I have learned a lot during the discussion about tolling vs value pricing and the current conditions in our region, most especially in Clackamas County . Though it is complex and politically charged it has brought forth good ideas and exposed the multiple infrastructure challenges our region is facing. Our transportation system is woefully undersized in many regards and year after year national studies have ranked our region's congestion as one the worst in the country.

Ironically perhaps, is that the Portland Metro region is ranked high nationally in the categories of transit ridership, and in bike/ped use. Also ironically, ODOT studies have indicated particular sections of Interstates 5 & 205 where congestion is the worst, there is light rail service running in parallel.

Our region's population is growing faster than we are growing our transportation system and we are also facing increasing poverty and homelessness. How transportation decisions are made in this region is a mystery to most citizens, and it appears that our regional government structure is failing to meet the transportation needs and failing to recognize the voices of our local jurisdictions. Instead our regional government appears to have narrowed it's focus on transit solutions and not other pragmatic solutions that serve the diverse transportation needs of a region with a shared responsibility of moving agriculture products produced in our state, manufacturing products and hundreds of other goods and services necessary to serve the growing population. Our region's population deserves better and I find the hard line ideology of rejecting highway solutions as lacking the vision needed to serve our region.

The Clackamas County Commission is supportive of investing in bike/ped, transit, safe routes to schools, safety improvements, local roads, and our highway system.

Minority report or Majority?

It is unclear at this time whether the votes taken at our June 25th meeting provide any particular direction. While all of the votes taken had a majority of support, many of questions voted on conflict with one another. Perhaps what is clear is that further study and analysis is needed. Due to the fact I did not vote in favor of all the questions I presume this will be interpreted as a minority report.

Current Conditions and factors for consideration.

At a recent public presentation ODOT staff recently confirmed that there are no value priced roadways (all lanes) in the Western United States, only value priced bridges.

Other metro regions that have value priced roadways also have substantial highway capacity, transit capacity, and other alternatives for commuters to utilize.

There are major sections of I-205 where no alternatives exist today. (i.e. 14 mile section of I-205)

Successful Value pricing is predicated on encouraging commuters to use alternatives.

Value Pricing major sections of an interstate where there are no alternatives is unfair and is viewed by some as a trap and a scheme to extract their hard earned dollars.

The highway system capacity in some areas of the Portland Metro Region is significantly undersized.

The prospect of value pricing highway sections that are woefully undersized is not good public policy.

Proposing to value price a highway system with adequate capacity and existing transportation alternatives is more reflective of what is occurring in other Metro regions.

Moving forward on a pilot concept of value pricing where commuters have choices such as parallel transit lines may have merit, particularly if the pilot project can demonstrate that motorists actually will switch to transit. Therefore it seems logical to study value pricing sections of the interstate where parallel transit lines exist and not sections where alternatives do not exist.

Unwanted Diversion is occurring today as a result of congestion, which is causing unsafe conditions on local roads, and unfortunately traffic fatalities.

Clackamas County Board of Commissioners position throughout this process

- 1) If the highways are tolled, revenues generated from tolling should fund needed capacity
- 2) Express lanes (value priced lanes) should be considered, especially as it has the least impact to low income communities.
- 3) System capacity to meet future demands of our growing economy should be factored (big picture, visionary)
- 4) The original Option 4 (from technical memorandum 3) should move forward for evaluation because it was the only option modeled that demonstrated the greatest congestion relief, the least diversion, and little impact to low income populations.

My recommendations to the OTC as a member of the PAC

Due the direction given by legislature in HB2017 my comments are predicated on the state mandate to value price our system. If the OTC continues to move forward on value pricing and no funding for eliminating the 5.8 mile long bottleneck on Interstate 205 is identified, my comments are as follows:

Without more financial data & identified solutions to unwanted diversion I do not feel the PAC is or was adequately equipped to make a recommendation on a particular Concept.

- 1) Concepts A & D should be studied further
- 2) Concepts B & E should be evaluated further
- 3) Revenue generation should adequately fund the improvements necessary to build capacity that increases throughput and meets the needs of our growing economy.
- 4) Further analysis of priced lanes (express lanes) that offer one exclusively priced lane for autos and another priced lane for both trucks and motorists, whereby free lanes exist for low income populations that will not create undue hardship. (Option 4, tech. memo. #3)
- 5) All Bottlenecks such as I-205 & Rose Quarter should be eliminated and there must be adequate funding identified to eliminate the bottleneck on I-205.
- 6) Consideration of current and future technologies should be part of transportation planning consideration in the long term.

Comments and suggestions:

A measure of success for consideration is ensuring to the public that any proposal will reduce unsafe and unwanted diversion, not increase it.

ODOT, the legislature, local jurisdictions, and Metro must commit to and or support funding highway and transit improvements necessary to lessen and eliminate unwanted diversion whether it is caused by current conditions such as congestion or value pricing/tolling scenarios.

The idea of spreading the negative impacts via Concept C should only occur if and when each section of the interstates have equal or similar alternatives. Currently there are miles of interstate that have no alternatives which would result in unfair impacts to adjacent communities.

There has yet to be any substantive discussion or solutions identified to reduce the congestion/backup on both Interstate 5 and 205 bridges crossing the Columbia River during rush hour. The apparent congestion/bottleneck at and over the I-5 and 205 bridges has not been adequately addressed. Further discussion and study with WDOT regarding their proposals and or concerns should occur. These issues must be dealt with as it has tremendous impacts to both Oregon & Washington commuters and nearby neighborhoods and businesses.

I would be remiss if I did not share my thoughts on the process. With over 20 years of experience serving on countless committees convened by government agencies I believe there has not been adequate time or opportunity for this committee to complete it's work. It has been the ODOT staff and consultant that apparently did the evaluating, drawn the conclusions, eliminated certain Options, and prepared the recommendations. Although during the final meeting the committee was given the latitude to reframe the questions, there was simply not adequate opportunity to do any meaningful analysis or create any alternative recommendation(s).

Over the years I have been supportive of ODOT and I have great respect for the department. There are many examples of successful projects throughout our region which were delivered on time and under budget. In this case however I feel we missed an opportunity here and it is my recommendation that ODOT consider improving the process. While I recognize the legislature established a compressed timeline, there was simply inadequate time for this committee to make a comprehensive recommendation.

Whether or not value pricing moves forward the public deserves clear and concise plans that identify solutions to transportation capacity problems including the fairest means possible to fund those solutions. The solutions should include solutions for all capacity needs in all modes. I believe that capacity is understood by many as improvements that will increase throughput and efficiency. I also believe the state and federal highway authorities have a responsibility to keep interstate and highway users on the highway versus allowing diversion off the highways and interstates to avoid congestion, gridlock, or priced roadways.

Thank you for this opportunity, it has been of value. What has been learned will serve us well going forward. I would like to acknowledge all the good work by the ODOT staff and I appreciate the efforts on all the open houses and ODOT's public outreach efforts. I thought they were well prepared and the staff were well versed on the topic.

Respectfully submitted,

Paul Savas

Clackamas County Commissioner, PAC member.

**CLARK COUNTY WASHINGTON**clark.wa.gov**CLARK COUNTY COUNCIL**

Marc Boldt, Chair

Jeanne E. Stewart, Julie Olson, John Blom, Eileen Quiring

1300 Franklin Street

PO Box 5000

Vancouver, WA 98666-5000

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June 27, 2018

Oregon Department of Transportation
Value Pricing Advisory Committee
355 Capitol St. NE
Salem, OR 97301

Oregon Transportation Commission
355 Capitol St. NE, MS11
Salem, OR 97301

Dear Value Pricing Advisory Committee,

The Clark County Council previously expressed concern to you regarding potential tolling on the Interstate 5 and 205 corridors and its outright opposition to the proposed maximum tolling design known as "Concept C." In addition to "Concept C," the Clark County Council strongly urges you to abandon "Concept B" as part of the pilot program of tolling lanes on I-5 between Going Street and Multnomah Boulevard.

At first blush, it appears "Concept B" is being floated as a more palatable option to "Concept C." The truth of the matter is "Concept B" would have a negative impact on traffic on both sides of the river, and Clark County commuters would be disproportionately affected by this tolling concept.

If "Concept B" is initiated, anyone driving to the east side of Portland and south of Going Street will very likely choose the Glenn L. Jackson Bridge. Many commuters who normally would use I-5 will divert to I-205 via State Routes 500 and 14, Clark County's major east/west freeways. These routes already handle a large amount of traffic considering they are both two-lane highways in both directions, and SR 500 has several stop lights between I-5 and I-205.

Currently, when one bridge is backed up during rush hour — forcing commuters to divert to the other bridge — SR 500 and 14 become parking lots. Clark County residents who work in Clark County are caught in this traffic despite the fact that they are not traveling to Portland.

"Concept B" will turn this occasional traffic dilemma into an every-day occurrence. Not only will the plan not alleviate congestion in Portland, it will artificially impose greater congestion on the north side of the river.

Increased congestion on SR 500 and 14 won't be the only traffic issue. Those traveling via I-205 to avoid tolls are going to end up on east Portland surface streets and will cross the Willamette on smaller Portland bridges instead of using the Marquam or Freemont bridges that are better equipped to handle commuter traffic.

In addition to an abysmal traffic situation, Clark County commuters are — as with "Concept C" — being asked to bear the brunt of paying the proposed tolls.

As you know, Clark County residents working in Oregon do not have another option for entering your state to get to their places of employment. The bridges connecting our communities are the only routes to their livelihoods.

As local elected officials, we understand and appreciate the importance of keeping infrastructure safe and transportation moving. Clark County maintains 2,600 lane miles of roads in both urban and rural areas. Clark County is a vibrant community situated along the interstate highway that connects all of North America, and we realize how vital it is to keep freight, goods, tourists, businesses and workers moving smoothly along I-5.

That said, we do not believe that alleviating the congestion that takes place in Portland should be disproportionately paid for by Clark County commuters. The Clark County Council believes county residents who travel to Oregon will receive little to no benefit from infrastructure improvements constructed with the tolling design proposed in "Concepts B or C."

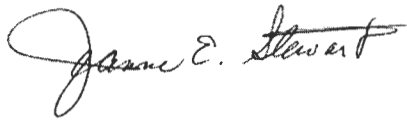
It is unfair to ask Clark County residents to pay for transportation enhancements that will not address their concern of spending an inordinate amount of time in traffic that means less time at home with their families.

Again, the Clark County Council strongly urges you to forgo the "Concept B" tolling design.

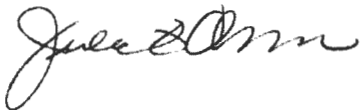
Sincerely,



Marc Boldt, Chair



Jeanne E. Stewart, Councilor District 1



Julie Olson, Councilor District 2



John Blom, Councilor District 3



Eileen Quiring, Councilor District 4



Jessica Vega Pederson
Multnomah County Commissioner

501 SE Hawthorne Blvd., Suite 600
Portland, Oregon 97214
Phone: (503) 988-5217
Email: district3@multco.us

June 29, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS11
Salem, OR 97301-3871

Dear Chair Baney and Oregon Transportation Commission members,

As a member of the Oregon Department of Transportation (ODOT) Value Pricing Policy Advisory Committee (PAC), I have appreciated the time, attention, and thoroughness of the process undertaken to examine value pricing in the metro region. I also deeply appreciate the Oregon Transportation Commission (OTC) and the state legislature's commitment to exploring this innovative tool to manage congestion and improve safety, reliability, and accessibility issues of our road system, as well as public health and climate change concerns.

After participating in the PAC meetings, talking with members of the community, and examining successful value pricing systems in other regions, I believe that our system must be grounded in the following principles:

- **Manage demand, don't try to raise revenue.** The primary goal of any pricing program must be to manage demand, not raise revenue. We are all feeling the impact of increased congestion in our region; time spent in traffic means less time spent doing other things we'd rather be doing. That stress exerts a cost that we all feel when we're late to a meeting or to pick up kids, or struggling to deliver goods on time. Reliability in the overall system matters, and that's the goal we're trying to achieve.

Based on that overall objective, I believe scenarios B and modified E, and eventually C are the most demand-management based, and thus the most likely to deliver equitable and significant results to the region and minimize diversion on arterials. Long term, I

believe our region needs to explore congestion pricing in other corridors as well, such as along Sunset Highway, Highway 217 and I-84.

- **Improve transit before implementation.** The most successful congestion pricing strategies marry transit improvements with value pricing, to provide an enhanced, affordable, and reliable alternative to being tolled. These improvements help mitigate the impact on low-income communities in particular, and provide choice in moving more people through the system with greater efficiency. They also offer a benefit to the transportation system overall - an important selling point to those skeptical of tolling.

Managing demand can mean reducing demand during rush hour, but it can also mean shifting people to a more efficient mode of transportation – transit – as well. Demand management used in isolation won't equitably address the issue of congestion, particularly for low income individuals, if not paired with transit enhancements.

It is my hope that any pricing program will include increased transit access on routes related to the priced corridors, particularly on routes that currently have no transit option and/or serve low income communities and communities of color. Improved transit access should be made explicit in the value pricing program's framework and problem statement. The value pricing conversation must be done in lock step with improvements in the transit system. This cannot wait until the end of ODOT's process.

- **Address safety and diversion on arterials.** The implementation of value pricing will result in diversion onto arterials and local streets, meaning additional traffic, safety concerns, and quality of life impacts. While OTC's explicit legislative direction is to only consider I-5 and I-205, a value pricing program must take into consideration the impact of that program on the rest of the region, including arterials. As stated before, funding generated from value pricing should be used on these local arterials to help address these concerns.
- **Focus on equity.** While the second and third principles above will help provide transportation alternatives and keep funding in communities most impacted by the imposition of congestion pricing, we must ensure that the concerns of low income communities and communities of color are fully addressed and that they continue to be provided with an opportunity to determine what's best for their communities, particularly when ensuring that affordable, efficient, and usable options to tolling are provided.

Successfully implementing congestion pricing will not be easy, but I'm confident that working collaboratively and thoughtfully it can be done. I also believe value pricing will be a more responsible, effective, and appropriate tool for addressing congestion than trying to expand our freeway and road system. Given our burgeoning population, warming climate, and values around walkability, health, and alternative transportation, we must make value pricing work.

The PAC has provided strong recommendations for you to consider, and I believe that the principles above are essential to the success of a pricing program and must be incorporated into the OTCs final proposal. I also agree with the staff recommendation that there be future, system-wide analysis done, and hope that these principles are incorporated into that study as well.

Thank you for your service to our state.

Sincerely,

A handwritten signature in black ink that reads "Jessica Vega Pederson". The signature is written in a cursive, flowing style.

Jessica Vega Pederson
Multnomah County Commissioner



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June 28, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, Oregon 97301

Dear Commissioner Baney and members of the Oregon Transportation Commission,

Oregon Environmental Council appreciated the opportunity to serve on the Value Pricing Policy Advisory Committee and learn the perspectives of fellow committee members and the public. Although the Committee did not deliver a tidy consensus recommendation, there was certainly some agreement and the process revealed the main areas to focus on moving forward.

Oregon Environmental Council has long been a proponent of congestion pricing. In fact, in 1993, Oregon Environmental Council persuaded Metro to submit a proposal to the FHWA to fund a study of congestion pricing. The pursuant Traffic Relief Options Study concluded in 1999 that peak period pricing could successfully relieve congestion in an equitable, cost-effective manner. Nearly 20 years later, the region is finally getting serious about tackling congestion the right way. Properly implemented, congestion pricing will improve the movement of people and goods, strengthen the economy, reduce pollution, advance equity, and save billions of dollars in unnecessary road construction projects. The benefits of congestion pricing have been proven in both theory and practice.

Congestion on our roads is a serious issue for residents of the Portland area and for the entire state economy. Oregon Environmental Council found it encouraging that the Oregon Legislature included provisions for congestion pricing in HB 2017. When it comes to congestion, we've reached a fork in the road: try to solve congestion the old way—by adding expensive new lanes and watching them quickly fill up—or do so in new, smarter ways—by managing demand while also providing a variety of practical and reliable transportation options.

The primary goal of congestion pricing should be to improve the efficient use of the highways and taxpayer dollars, not to raise revenues. Oregon Statute 366.292 requires that the Oregon Department of Transportation determine potential tolling options *prior* to proceeding with a highway modernization project. The Keep Oregon Moving legislation (HB 2017) states in Section 120 (3): "After seeking and receiving approval from the Federal Highway Administration, the commission shall implement value pricing *to reduce traffic congestion*."

This is an important shift in Oregon's approach to managing congestion and to the sound management of public funds. Currently we build new roads to satisfy peak period travel. With congestion pricing in place, we will have a more analytically sound method for figuring out where and when new capacity is actually needed.

ODOT's consultant report clearly demonstrates in Concept C that a focus on demand management on all of I-5 and I-205 in the Portland area yields the greatest outcomes. The report anticipates significant travel time savings and some \$300 million in annual revenues that could be used to improve travel options. It is quite probable that some of the planned capital improvements on the system may not be necessary with pricing in place. In other words, congestion pricing *is*—in and of itself—new capacity.

Oregon Environmental Council recognizes the political hurdle we face in implementing a pricing strategy at this scale. At the same time, the most important element of any pricing scheme is that it works and delivers immediate and significant benefits to users. Concept C is the most likely to deliver these outcomes. Oregon Environmental Council could also support shorter priced segments of the system, but only if they are designed to manage demand, deliver significant outcomes for users, and are part of a larger strategy for demand management on the broader system.

Oregon Environmental Council values equity. Any application of congestion pricing must directly address the potential impacts on low- to moderate-income drivers and to local neighborhoods. Although most peak-hour trips are made by higher-income drivers, travelers with lower incomes do drive during peak periods. In fact, many low-income residents have been pushed to Portland's periphery where they are forced to travel longer distances and have fewer public transit options. At the same time, low-income residents tend to have less flexibility in their jobs and it hurts their pocketbook more when their child's day care charges late fees. Because congestion can be an even greater burden for these members of our community, congestion relief is a good thing, but ability to pay also comes into play. We can't stress enough the importance of accessible and convenient walking, biking, and transit in areas where congestion pricing is implemented, in order to provide affordable, sustainable transportation choices. And in situations where low-income residents are unable to avoid congestion pricing, the system can be made fair and equitable through targeted discounts or exemptions. We therefore strongly support the list of mitigation options presented for further analysis and—as we noted in the last meeting of the Advisory Committee—they must be "baked in" to the process rather than "bolted on" as an afterthought.

It is also important to note that the status quo is not equitable. Congestion acts as a hidden tax on disadvantaged communities, clogging up the roadways for those who need them most. The conventional way to address congestion—adding new roadway capacity—is paid for with regressive taxes and is the least effective, most costly option.

Congestion also adds to the climate crisis and impacts the health of those who live near busy transportation corridors. Idling cars release more carbon dioxide because they get fewer miles per gallon, and they pump out extra air pollution because the catalytic converters that capture pollutants before they hit the tailpipe don't function as well in stop-and-go traffic. The neighborhoods flanking busy roadways and intermodal freight facilities suffer a heavier health burden from this air (and noise) pollution and are often lower-income.

Preventing diversion to local streets is also important for the safety and wellbeing of local communities and all modes of travel. Mitigation strategies will surely be needed, but as the Advisory Committee learned from the consultant's modeling, congestion pricing actually mitigates some diversion because a number of drivers who are already diverting to local roads because of existing congestion switch back to the variably tolled freeway because it is moving freely and they can get where they need to go on time.

Congestion pricing can deliver outcomes to urgent challenges around climate change, air quality, public finance, and wealth inequality. As such, Oregon Environmental Council is strongly supportive of the Oregon Transportation Commission in taking the next steps in this process. We encourage an ambitious course of action that delivers the greatest benefits for road users and all Oregonians.

Thank you for taking on the mantle, and please let us know how we can be of help.

Sincerely,

A handwritten signature in black ink that reads "CHagerbaumer". The signature is written in a cursive, slightly slanted style.

Chris Hagerbaumer, Deputy Director
chrish@oeconline.org
503-222-1963 x102



June 29, 2018

The Oregon Transportation Commission
355 Capitol Street NE
Salem, OR 97301

Chair Baney and Members of the Commission,

Thank you for the opportunity to participate in the Value Pricing PAC. The supporting materials provided by the consultants along with the variety of perspectives from PAC members provided meaningful discussions throughout the process. I also appreciated the investment of time and guidance of Co-Chairs O'Hollaren and Simpson who were able to focus the group on the task at hand.

The efficient movement of people and goods forms the bedrock of Oregon's economy. Members of the Oregon Trucking Associations understand this firsthand because they depend on Oregon's critical transportation infrastructure for their very livelihood. OTA supports and encourages meaningful efforts to reduce congestion in the Portland Metropolitan region and respectfully submits the following values and priorities which we believe are incumbent to the discussion of tolling and congestion pricing.

Implementation of value pricing must result in meaningful investment in additional capacity for freight. While some suggest that "if you build it, they will come" and adding more lanes merely induces demand, it is important to recognize two key points: Year after year, Oregon continues to be a top migration state, with people arriving at rates not seen since the 1990's. Portland also has the distinct honor of being the only major city, from Canada to Mexico, to restrict Interstate 5 down to two lanes through a heavily congested urban region. While no single method alone is the "silver bullet" solution, additional capacity must be part of a balanced approach to significantly reducing congestion in the region.

While value pricing is a relatively new issue for Oregon, raising revenue from highway users is an old, well-settled topic. OTA supports value pricing if revenues from these efforts are directed to the Highway Trust Fund and spent on maintenance and expansion of state highways in accordance with Oregon's constitution.

OTA supports addressing both I-5 and I-205 concurrently in order to avoid diversion from one freeway network to another. At the same time, we believe a measured approach is appropriate and would support trial or pilot projects to address these two highway corridors. To that end, the proposed solutions outlined in Concepts 'B' and 'E' are pragmatic first steps. They allow the state to test two distinct tolling methods without shifting the problem from one highway to

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another. By tolling all travel lanes, these proposals are preferable to singular priced lanes, which typically exclude freight traffic.

Finally, whichever congestion pricing mechanism the state brings forward, it must be safe, efficient, and it must be well understood by Oregon's traveling public. The Oregon Trucking Associations remain committed to working with lawmakers in order to produce the best possible policy for motorists and truckers – and for Oregon's long-term economic growth and stability.

Sincerely,

Jana Jarvis

Jana Jarvis

President & CEO



June 22, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, Oregon 97301

Dear Chair Baney and Oregon Transportation Commission members,

The Port of Portland's mission is the efficient movement of people and goods – which is becoming increasingly difficult as population growth outpaces the capacity of our roads, highways and bridges. Policymakers must find ways to better manage the system and achieve multiple outcomes – congestion relief, greenhouse gas reduction and revenue generation. Value pricing is just that, and it's been a pleasure to serve on the Portland Metro Area Value Pricing Advisory Committee (PAC).

As the committee wraps up its work, I'd like to share my thoughts on the complexity of the moment we're in and the opportunity we have to embrace a big idea. Value pricing works in reducing congestion the world over, but to get it started requires tremendous resource dedication and political capital. The outcome needs to be worth the effort, or the public will never buy into it and our opportunity will be lost. To me, "worth it" means: a noticeable reduction in congestion, support for historically disadvantaged communities and increased travel options. The only option that clearly meets these goals is Concept C – which aims to establish congestion pricing on both I-5 and I-205 between the Columbia River and where the two routes meet south of Portland.

The role of the PAC was to evaluate options with many considerations – including feasibility under federal law. With that in mind, I understand the recommendation of Concept B paired with Concept E as a step toward a more comprehensive option, but I remain concerned that this effort favors feasibility over efficacy. I strongly encourage the Oregon Transportation Commission to take this recommendation as a true starting point and continue to work toward a more comprehensive approach to value pricing. This could look like an ambitious proposal to the Federal Highway Administration, a commitment to look at other highways and cooperation with local governments interested in continuing this work.

In any case, **equity must be front and center**. The opportunity to get where you're going faster for a small charge is exciting for those who can afford it, and daunting for those who cannot. Diversion to alternate routes will negatively impact underrepresented communities by putting more traffic (and related emissions) into neighborhoods, making them less safe. Steps can be taken to aggressively mitigate these impacts, using the proceeds of a broad-based congestion pricing system.

Tammy Baney
June 22, 2018
Page 2

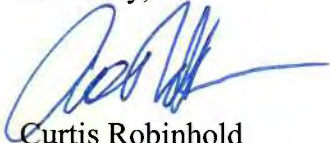
Second, if we want people to get off the roads but continue contributing to the economy and our communities, **we need to create more affordable and reliable options**. Significant investment in transit is therefore essential to this discussion.

Many questions will not be answered until decisions are made and additional modeling is complete. For example: what strategies can be implemented to ensure freight throughput is maintained at all hours? Under Concept B, what will diversion patterns look like as it pertains to Washington commuters? Will additional stress be put on Marine Drive, Airport Way, NE 82nd Avenue and Sandy Boulevard? These are all critical arterials for our operations, so we will stay engaged and interested in the potential outcomes.

While it is a good tool for reducing congestion, **value pricing should not be considered as a replacement to freeway expansion and modernization projects**. To meet the needs of our growing region, we must both address bottlenecks in the system to increase capacity, and better manage the system with pricing.

Finally, I'd like to thank our PAC co-chairs, Sean O'Hollaren and Alando Simpson, as well as ODOT staff in leading a well-organized process. I'm confident that getting this right will be worth the effort, and look forward to our continued collaboration. Oregon has a history of bold leadership in ideas and in implementation. Land use, coastal access, recycling, vote-by-mail, and many other policy efforts were the first of their kind, and led the way for countless others to follow. **It is time again for Oregonians to be bold, to lead where leadership is needed, and to improve our quality of life for years to come.**

Sincerely,



Curtis Robinhold
Executive Director

CC Matt Garrett, ODOT Director
Rian Windsheimer, ODOT Region 1 Manager
Judith Gray, ODOT Region 1 Value Pricing Project Manager



CITY OF

PORTLAND, OREGON

Ted Wheeler, Mayor
Amanda Fritz, Commissioner
Nick Fish, Commissioner
Dan Saltzman, Commissioner
Chloe Eudaly, Commissioner

June 29, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, OR 97301

Dear Chair Baney and Members of the Oregon Transportation Commission,

The City of Portland is supportive of the state legislature's directive to implement value pricing in our region. Our recently adopted Central City Plan calls for value pricing along the I-5 Rose Quarter project as a climate mitigation action. This region's residents, businesses, and visitors are all feeling the impact of increased congestion. This congestion comes with many costs. It costs us in time, it costs us in fuel and vehicle repair costs, our health is damaged by air pollution and extra sedentary time in cars, and it adds to greenhouse gas emissions and climate change. Unacceptably, these costs can hit our lower income residents and communities of color hardest because they often have longer commute trips and live closer to freeways.

We cannot build our way out of our congestion problem. We must find new tools. Pricing is a proven strategy for reducing congestion, addressing climate change and environmental pollutants, and may be designed to reduce inequities that exist in our current transportation system. We would like to see the ODOT value pricing process move forward to the next phase for further analysis during a National Environmental Protection Act (NEPA) process.

Any pricing program must be carefully designed for success and grounded in the following policy objectives:

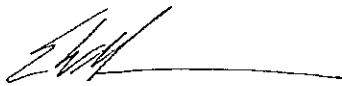
- 1) **The primary objective of any pricing program must be to manage demand**, as opposed to generating revenue for unmanaged increases in capacity. Demand management works to maximize efficiency on existing roads and provides the greatest congestion relief and travel time savings. This principle has been recognized twice under state law [ORS 366.292 and HB 2017 Section 120(3)].
- 2) **Improved transit must be matched with pricing to most effectively manage congestion and provide affordable options for system users.** Pricing revenue, to the extent allowed by law, should be used to support this objective. An analysis of the optimal expansion of transit to be paired with demand management, should be a foundational part of the analysis.

- 3) **Creating a more equitable system must drive policy development. It is not enough to simply mitigate burdens to historically marginalized communities, including communities of color and people with low-income.** Providing shorter travel times, better air quality and safer corridor travel, should be paired with reduced fees, and enhanced transit, in order to create a transportation system that offers more benefits and less burdens to low-income communities and communities of color.
- 4) **We must maintain or improve safety levels on the surrounding local network,** especially in cases of traffic diversion from priced throughways. Revenue should be dedicated to safety improvements on arterials which see diversion.
- 5) **Managing demand should lead to environmental benefits,** including reduction in CO2 and particulates emissions.

Proposed Scenarios

- 1) **Portland supports the referral of Option C to the Oregon Transportation Commission for further analysis.** This would implement comprehensive pricing for demand management on most of I-5 and I-205 in the metro region. Initial modeling of Option C shows the greatest travel time savings and revenue generation, as well as the lowest toll rates of any of the proposed options. This could be implemented in phases, prioritizing the highest performing segments.
- 2) **The City is supportive of continued evaluation of Options B (I-5 only) and E (Ahernethy Bridge) as a phased approach to achieving option C.** Additional analysis of Option B must include more detailed consideration of starting and ending points due to diversion concerns. Revenue generated from Option B must be used to ensure corridor safety and multimodal options, including transit. **Revenue from I-5 tolling shall not be used to fund I-205 expansion. Similar demand management strategies should be used in the I-205 corridor.**

We appreciate your thoughtful consideration of the critical policies and details necessary to implement a successful value pricing program in the Portland Metro region. We have an opportunity to be national leaders and create a program that helps to relieve congestion, improve climate and environmental pollutants, and provide a range of multimodal options to improve transportation outcomes for all users. We look forward to continuing this important work together.



Ted Wheeler
Mayor



Amanda Fritz
Commissioner



Nick Fish
Commissioner



Dan Saltzman
Commissioner



Chloe Eudaly
Commissioner

June 28, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, Oregon 97301

Dear Chair Baney and Oregon Transportation Commission members,

Ride Connection is a private non-profit transportation agency providing over half a million rides per year, primarily to people who are elderly and/or disabled in the Portland Metropolitan Area. Having highways flowing smoothly is very important to what we do. Because of that Ride Connection greatly appreciated having a representative on the Portland Region Value Pricing Policy Advisory Committee (PAC).

Ride Connection supports the recommendations of the PAC to start two pilot projects with a larger scale phased implementation. We believe congestion pricing is one tool that could help to enable quicker movement throughout the region.

Ride Connection strongly endorses the mitigation strategies recommended by the PAC and particularly recommends that the OTC commit to more transit, carpool and vanpool opportunities and other mitigation before moving ahead with any congestion pricing.

As the Oregon Transportation Commission moves ahead with congestion pricing we look forward to discussing how volunteer transportation services and programs providing free transportation services for transportation disadvantaged individuals (elderly, disabled, etc.) can be supported, rather than hindered, by congestion pricing programs.

Finally, thank you to our PAC co-chairs, Sean O'Hollaren and Alando Simpson, the ODOT staff, Penny Mabie and WSP for guiding and walking the committee through this complicated process.

Sincerely,



Park Woodworth
Board Member, Ride Connection

CC: Matt Garrett, ODOT Director
Rian Windsheimer, ODOT Region 1 Manager
Judith Grey, ODOT Region 1 Value Pricing Project Manager



June 29, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS11
Salem, Oregon 97301

Dear Chair Baney and Oregon Transportation Commission members,

On behalf of TriMet, it's been a pleasure to serve on the Portland Metro Area Value Pricing Policy Advisory Committee. As the largest provider of public transit in Oregon, we're constantly seeking new ways to keep people moving. In 2018, we are expanding service to provide new and better connections with education, employment and other opportunities; making investments in new vehicles, facilitates and technology to improve reliability and the customer experience; and working with partners throughout the region to find innovative mobility solutions.

As our committee wraps up its work from our final meeting, I want to express TriMet's support for a number of the recommended congestion pricing concepts and mitigation proposals.

TriMet supports the committee's adoption of mitigation strategies that address diversion to local roads, to other modes and balancing between the two interstate freeways. Much of the public input to the committee focused on the need to provide additional transit service as a mitigation for the impact of value pricing on low income communities. To be an effective mitigation, transit service must be frequent, convenient and reliable – which typically means that it needs dedicated facilities such as HOV lanes, or significant investments in arterials that run parallel to the priced facility to facilitate faster transit movement. Such facilities are costly and will require significant investment beyond TriMet's current resources to be achieved. Finally, TriMet supports the committee's recommendation that mitigations should be in place at the time value pricing is implemented, not after the fact.

Regarding the value pricing options for the Portland metro area for further traffic, revenue and environmental analysis, TriMet believes our aim should be to work towards implementing the comprehensive planning effort for pricing larger portions of the corridors (concept C). Pricing the first two discreet segments on I-5 and I-205 should be seen as pilot projects (concepts B and modified concept E) to inform the larger pricing program and approach.

As the goal of congestion pricing is to get the most out of the existing system by encouraging some people to travel at less congested times or to choose a mode



such as transit, carpool, bicycle, or walking instead, TriMet expects the program results to include reduced congestion and more predictable travel times for all modes. Any congestion pricing program should include strategies to improve public transportation, contain provisions to assist environmental justice and low income populations, and minimize negative effects of freeway diversion onto local roads.

We look forward to continuing to work with our partners on this important analysis to implement congestion pricing in the Portland metro region.

Sincerely,

A handwritten signature in black ink that reads "Bernie Bottomly". The signature is fluid and cursive, with the first name "Bernie" and last name "Bottomly" clearly distinguishable.

Bernie Bottomly
TriMet



June 29, 2018

Mr. Sean O'Hollaren
Mr. Alando Simpson
Co-Chairs of the Portland Area Value Pricing Advisory Committee
Oregon Department of Transportation Region 1
123 NW Flanders Street
Portland, OR 97209

Ms. Tammy Baney
Chair, Oregon Transportation Commission
355 Capital Street NE
MS 11
Salem, OR 97301-3871

RE: Portland Metro Area Value Pricing Feasibility Study

Dear PAC Co-Chairs and Chair of the Oregon Transportation Commission,

The Vancouver City Council recognizes the significant impacts of highway congestion on the bi-state region. Our Council embraces the need for policymakers and agencies to work together to fund and implement improvements to the bi-state regional transportation system, including bottleneck removal and operational and multi-modal enhancements. Given the significant costs of any mitigation strategy, the Vancouver City Council is compelled to advocate on behalf of our residents for fair and equitable solutions. The current value pricing proposal under consideration will have substantial impacts on commuters from around the Portland-Vancouver Metropolitan region. For the Vancouver City Council to accept a value pricing proposal, it must provide equitable distribution of both impacts and benefits and reflect the following principles:

Regional Analysis of the Bi-State Transportation System

Coordination with metropolitan area transportation and transit related agencies, including those in Southwest Washington, must be thoughtful and ongoing throughout the planning process for any long-term change to the regional, bi-state system.

- The current tolling proposals for I-5 (Concept B) and I-205 (Concept Modified E) will have impacts on the entire regional transportation system. The impact analysis for any tolling proposal must evaluate these system-wide impacts, and should not be limited to the areas directly adjacent to tolls. This should include local street systems and highways.

- A full analysis of the regional bi-state transportation system is required to understand potential future impacts of a priced regional system (Concept C or other future options). In Oregon, this analysis must include I-84, I-405, OR-26 and OR-217, as well as all regionally significant bottlenecks, including the Interstate 5 Bridge.
- This analysis must be conducted prior to implementation of a priced system concept (Concept C or other future options), and should be the basis for determining what roadways are included in it.

Regional Mitigation

The mitigation strategy for any congestion pricing project must consider the entire regional system, be equally applicable in both Oregon and Washington, and include all impacted local street systems and highways. All impacts, both direct and indirect, must be addressed by mitigation strategies that are proportional to the impact.

- Low-income residents of SW Washington must be able to access, without additional burden, discounts or subsidies that are established as part of any tolling program.
- Mitigation strategies that focus on increased transit must apply throughout the bi-state region.

As the only transit provider that operates in both Oregon and Washington, C-TRAN will be a key partner in providing enhanced service and expanded transportation options.

- In relation to transit, ODOT staff have indicated that tolling revenues may be used to support capital improvements but cannot fund expanded transit service and operational costs.
- Prior to implementation of any value pricing concept, regulatory barriers to using tolling revenues to fund transit operations, and geographic limitations on where funding can be directed, must be remedied.

Regional Project Implementation

Tolling revenues should be used to address capacity issues throughout the bi-state region, including regionally significant bottleneck projects, transit enhancements and other multi-modal improvements. We support capacity improvements that benefit the people who pay the toll.

- In order to ensure that benefits are distributed equitably, improvements should be tied to the corridor where the revenue is generated.
- Increased transit options must be provided regardless of state of origin.
- Replacement of the Interstate 5 Bridge must be included in any discussion of bottleneck relief projects.
- Tolling revenues should be used to support capacity improvements identified in and consistent with adopted regional plans.

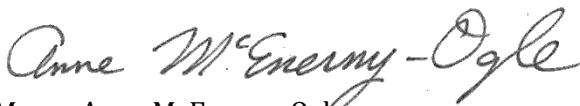
Regional Engagement

- The timeline for the Portland Area Value Pricing Feasibility Study was insufficient. In order to ensure that residents and policymakers throughout the region have the opportunity for meaningful participation, the next phase of the value pricing process must allow more time for analysis and feedback.
- The current value pricing proposal represents a significant change to our regional transportation system. Inevitable implementation glitches in a highly congested corridor could have crippling

effects on the entire system. Implementation of Concepts B and Modified E should include a high level of transparency, have comprehensive risk management strategies, and be phased to contain disruptions to small areas, with the most congested areas being transitioned last.

- The Oregon Transportation Commission must continue to engage with policymakers and constituencies in Southwest Washington.

Past bi-state planning and coordination has resulted in significant and equitably beneficial regional infrastructure improvements. The Vancouver City Council hopes our concerns are acknowledged and addressed and the implementation of value pricing is collaborative and equitable. This will allow future efforts to address regional transportation challenges, like replacing the Interstate 5 Bridge, to proceed in a positive, productive and expeditious manner.



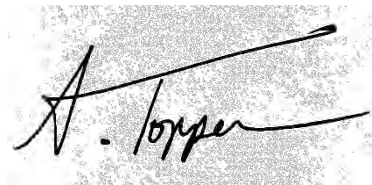
Mayor Anne McEnerney-Ogle



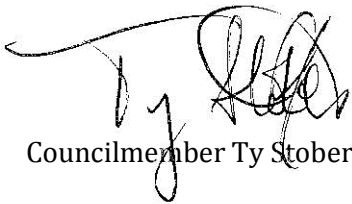
Mayor Pro Tem Bart Hansen



Councilmember Bill Turley



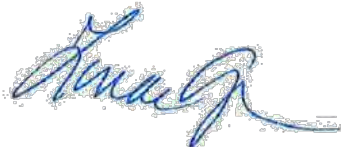
Councilmember Alishia Topper



Councilmember Ty Stober



Councilmember Laurie Lebowsky



Councilmember Linda Glover



WASHINGTON COUNTY

OREGON

June 29, 2018

Tammy Baney, Chair
Oregon Transportation Commission
355 Capital St. NE, MS 11
Salem, OR 97301-3871

Dear Chair Baney and the Oregon Transportation Commission members:

As a member of the Value Pricing PAC, I'd like to share my comments with you on the committee's recommendations earlier this week. First, I'd like to acknowledge the good work of your staff and the consultant team in helping us work through a complex analysis in a very short time. We worked through a lot, learned a lot and made significant accomplishment in these initial recommendations.

As you know, the regional system in the Portland Metro area has not kept up with the increasing demands of a growing region or the increased statewide and interstate freight and travel growth. Like others, I accept that tolling is now one of our tools to meet our transportation needs.

I support the PAC's recommendation for a two-tiered approach starting with tolling I-5 in Portland and tolling on I-205/Abernathy Bridge (Options B and Modified E) and the OTC advance tolling on both I-5 and I-205 after learning from this initial effort.

As we move forward with tolling on I-5 and I-205, I encourage the OTC to consider these principles:

- Link tolling directly to increased freeway capacity in the region. In the short term, this means targeting revenue to completing the investments in the region's bottleneck projects in the Rose Quarter and I-205/Abernathy Bridge. In the longer term it means identifying the next priorities for additional capacity improvements and linking these investments with additional tolling. It is important the people who pay the toll see benefits both in terms of better traffic flow and increased capacity.
- Address the impacts of diversion to other arterials and highways. This can be through increasing transit options, safety treatments or adding capacity to other impacted regional arterial and highway facilities. Revenue should not be spent on local projects in communities that are not impacted by diversion.
- Develop a program to mitigate the financial impacts for low income populations who must use the tolled facility.

June 29, 2018
Chair Baney and the Oregon Transportation Commission
Page 2 of 2

In the longer term I support the study of tolling on regional facilities beyond I-5 and I-205 as part of a study of investments in a balanced system that includes additional roadway capacity, bottlenecks improvements and transit investments. Tolling alone is unlikely to solve all of our traffic needs and a full set of options will be needed.

Sincerely,

A handwritten signature in black ink, appearing to read "R. Rogers". The signature is written in a cursive, slightly slanted style.

Commissioner Roy Rogers
Board of County Commissioners

RR/cd/cj

cc Washington County Board of Commissioners
Andrew Singelakis, Director of Land Use & Transportation



June 29th, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, OR 97301

Dear Chair Baney and the Oregon Transportation Commission members,

We appreciate the opportunity to participate in the Value Pricing working group. Value pricing represents an opportunity to simultaneously address carbon, economic opportunity, and quality of life for many Oregonians. We were heartened to hear the continued emphasis on equity throughout the process and applaud both ODOT and its consultant team for its serious consideration of that charge. To that end, we write to preserve two important considerations as the process moves forward.

1) While we applaud the good work of ODOT and the consultant team's efforts to engage low income and people of color communities, we believe there is a need for a Title VI disproportionate impacts analysis to ensure thorough and transparent evaluation of any program relative to its impacts on vulnerable populations.

2) Ensure a NEPA environmental impact analysis is completed to ensure strong understanding of environmental and social impacts.

The investment of state funds should lead to affirmative and measurable benefits for low income people and people of color. For too long, these populations have borne the burden of the carbon economy, the fossil fuel economy and the transportation system. Now is the time for these populations to enjoy the fruits of these systems in an affirmative way using the principal of targeted universalism espoused by John Powell of the Haas Institute. According to Powell: "Targeted universalism is a different way—a powerful way—to make the transformational changes we need. Changes we need to improve life chances, promote inclusion, and enhance and sustain equitable policies and programs."

Tony DeFalco
Deputy Director

Vivian Satterfield
Deputy Director

Gerik Kransky
Policy Director



June 29th, 2018

The Honorable Tammy Baney, Chair
Oregon Transportation Commission
355 Capitol Street, NE MS 11
Salem, OR 97301

Dear Chair Baney and the Oregon Transportation Commission members,

We appreciate the work that the State Legislature, the Oregon Transportation Commission (OTC), and the Oregon Department of Transportation have undertaken so far to advance the value pricing conversation in the Portland metropolitan region. As our region faces increasing growth, we need new tools at our disposal to improve the transportation experience for our region's residents and businesses. We support advancing the recommendation for value pricing on I-5 and I-205 for further analysis during a NEPA process.

The Value Pricing process has been complex, making it important for us to weigh in on larger policy goals and objectives, so we wanted to take this opportunity to make sure we are clear about the principles we want to see in a successful pricing program. We believe these principles can be incorporated, and want to be partners with you in implementing a program that meets them. These principles are similar to the principles all of us have articulated throughout the process:

- 1) **Any pricing program must focus on managing demand**, rather than generating revenue. The Portland region has significant transportation needs, and if we do not manage demand effectively and equitably, those needs will continue to spiral. Demand management maximizes efficiency on existing roads and provides the greatest congestion relief and travel time savings. This principle has been codified in state law [ORS 366.292 and HB 2017 Section 120(3)], is consistent with regional policy, and deserves an explicit commitment from the OTC.
- 2) **Increased transit access must be a core part of a pricing program, in order to most effectively manage congestion and provide affordable options for system users.** This provides people with equitable alternatives to driving, mitigates the impact on low-income communities, and moves more people through the system with greater efficiency. If we price the use of the roadway, we must provide people with an affordable, reliable option. We ask the OTC to embed increased transit access as a key performance measure for value pricing.
- 3) **A pricing program should affirmatively and measurably reduce current transportation inequities, not just mitigate burdens to low income communities and communities of color.** A strong pricing program can help reduce travel times, improve air quality, and result in safer and more efficient ways to get around. Pricing can and should be implemented in a way to create a transportation system that offers more benefits and less burdens to low-income communities and communities of color. Any system must not lead to disproportionate enforcement and penalties on people of color, including undocumented residents. We applaud the consultant's



report which highlighted multiple measures other jurisdictions have enacted to provide relief for low-income residents and suggest adoption of such measures.

This ethos should also be incorporated into any public engagement; special efforts should be made to listen to, address, and report out on the concerns of communities of color and low-income residents who might be impacted.

We also believe there is a need for future analysis of system-wide pricing, and believe that it should be a cooperative process, recognizing that local governments own and operate the majority of the roads in the region.

We look forward to working with you as the program further develops to ensure that these principles are upheld in its final form. We believe there is a path to success here and want to be partners.

Sincerely,

Tom Hughes, President
Metro Council

Jessica Vega Pederson, Commissioner
Multnomah County Commission

Dan Saltzman, Commissioner
Portland City Council

Bernie Bottomly, Executive Director of Public Affairs
TriMet

Gerik Kransky, Policy Director
The StreetTrust

Chris Hagerbaumer, Deputy Director
Oregon Environmental Council

Tony DeFalco, Deputy Director
Verde

Vivian Satterfield, Deputy Director
OPAL Environmental Justice Oregon

CC: Commissioner Simpson and O'Hollaren, Value Pricing PAC Co-chairs
Matt Garrett, ODOT Director
Phil Ditzler, FHWA Oregon Division Administrator



ATTACHMENT B: PAC CHARTER



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Portland Metro Area Value Pricing Feasibility Analysis Policy Advisory Committee

Committee Charter and Protocols

Preamble

Oregon House Bill 2017 from the 2017 Legislative session directs the Oregon Transportation Commission (OTC) to seek approval from the Federal Highway Administration (FHWA) by December 2018 to implement value pricing on the I-5 and I-205 corridors, from the Washington state line to their intersection in Oregon. Per the legislation, value pricing would be used to reduce traffic congestion in the Portland metropolitan region. If FHWA approves, the OTC is required to implement value pricing.

Value pricing, also known as congestion pricing or peak-period pricing, is a type of tolling in which a higher price is set for driving on a road when demand is greater, usually in the morning and evening rush hours. The goal is to reduce congestion by encouraging people to travel at less congested times or by other modes, and to provide a more reliable travel time for paying users. Value pricing can include converting a carpool lane (also known as a high occupancy vehicle or HOV lane) to a high occupancy toll (HOT) lane so non-carpoolers can choose to pay to use the lane to save time; putting a variable toll on a new highway lane; using tolls on bridges that vary by time of day; and other applications.

In order to develop a proposal to FHWA by December 2018, the Oregon Department of Transportation (ODOT) will conduct a feasibility analysis to determine where value pricing may be successfully applied on these corridors and what the impacts of each option will be. Throughout this process, ODOT will work with local government officials and stakeholders and seek public input so that the voice of all those who may be affected can be heard.

Purpose of Charter

This charter is intended to provide a clear and mutually agreeable statement of the roles and responsibilities of Policy Advisory Committee (Committee or PAC) members, ODOT staff and OTC. It also identifies the way in which the Committee will operate, including decision-making processes, meeting conduct and communication. Once agreed upon by the Committee, the charter will guide the work and conduct of the Committee in an open and transparent process.

Purpose of the Committee

The Value Pricing Policy Advisory Committee shall advise the OTC in implementing Section 120 of HB 2017 by:

- evaluating options to implement value pricing to reduce congestion on I-5 and I-205 in the Portland area based on factors provided below by the Commission
- considering public input for the various options



- considering effects and potential mitigation strategies for options
- providing input and recommendations on value pricing to the Commission to inform their proposal prior to applying to the Federal Highway Administration

Committee Composition

As directed by the OTC, the Committee will be composed of approximately 20 voting members representing a variety of interests and perspectives, including:

- Oregon Transportation Commission
- Oregon Department of Transportation
- City, county, and metropolitan planning organization officials from Oregon and Washington
- Highway users
- Advocates for equity, social justice, and environmental justice
- Public transportation
- Environmental advocacy groups
- Port of Portland
- Business community

The PAC will also include an ex officio member representing FHWA.

Should a member be deemed to no longer represent their constituents, agency or organization (through change in office, position or other circumstance) the OTC reserves the right to revisit the committee's standing membership to ensure the committee's representativeness.

As directed by the OTC, Committee members will be appointed by the ODOT Director.

The full Committee will meet about six times between fall 2017 and summer 2018. It will be facilitated by a neutral facilitator. Meeting observers are asked to silently observe the meeting. An opportunity for public comment to the Committee will be provided at each meeting. In addition, a dedicated email address enables the public to provide comment directly to the Committee.

Committee Responsibilities

Members will be responsible for representing stakeholder organizations, communicating routinely with their constituencies and providing recommendations to the Oregon Transportation Commission.

As described in Section 120 of HB 2017, value pricing is designed to relieve congestion on I-5 and I-205 in the Portland metropolitan region. The OTC intends to evaluate value pricing options that will address congestion through one or more of the following means.



- **Managing congestion:** Value pricing used to manage demand and encourage more efficient use of the transportation system by shifting trips to less congested times or designated lanes through pricing and/or maximizing the use of other modes to improve freeway reliability.
- **Financing bottleneck relief projects:** Value pricing used as a means to finance the construction of roadway improvements that address identified bottleneck projects that will improve the efficient movement of goods and people.

When **evaluating value pricing options**, the Committee shall at a minimum consider the following factors, and others as appropriate:

- **Revenue and cost:** To what extent the option will raise sufficient revenue to cover the cost of implementing value pricing as well as the ongoing operational expenses, including the costs of maintenance and repairs of the facility.
- **Traffic operations improvements:** To what extent the option will improve the traffic operations of the priced facility, including but not limited to increasing reliability and mitigating congestion.
- **Diversion of traffic:** To what extent the option will cause diversion to other routes and modes that will impact the performance and operations of other transportation facilities, including both roads and transit service.
- **Adequacy of transit service:** To what extent public transportation service is available to serve as an alternative, non-tolled mode of travel.
- **Equity impacts:** Whether the option will disproportionately impact environmental justice households or communities and to what extent mitigation strategies could reduce the impact.
- **Impacts on the community, economy, and environment:** Whether and how the option will impact the surrounding community, economy, and/or environment and the economy of the state in general.
- **Public input:** To what extent the public supports a particular pricing option as a way to address congestion.
- **Consistency with state and regional law and policy:** Whether the option will comply with existing Oregon Transportation Commission policies, state laws, and regional planning regulations.
- **Feasibility under federal law:** Whether the option is allowable under federal tolling laws or will require a waiver under the Value Pricing Pilot Program or some other authority.
- **Project delivery schedules:** Whether a value pricing option has the potential to alter the expected delivery schedule for a project on the corridor.

The Committee will also serve as a communications link between the feasibility analysis and stakeholders. Members will convey project-related information to and from respective communities and interest groups, and identify stakeholders and help facilitate contact with those groups and individuals.



Process and Protocols

The purpose of the Committee is to allow a diversity of perspectives to help shape the design of key elements of the project in the project area. While the Committee is advisory and does not have decision-making authority, the Committee will be called upon to provide insight, observations, feedback and recommendations to the OTC. All Committee feedback will be respectfully considered, in addition to technical findings and input received from the broader public. The OTC is the tolling authority in Oregon and will make the decision about what to submit to FHWA for approval.

Committee Recommendation Development Process

All members are encouraged to challenge themselves and each other to think creatively and to approach the feasibility analysis with an open mind. While it is important to identify problems, it is even more important to seek thoughtful solutions that advance the conversation.

The Committee's work will center on providing recommendations to the OTC by mid-2018. Recommendations will, at a minimum, address the following questions:

- Based on the considerations described under Committee Responsibilities, what location(s) on I-5 and/or I-205 are best suited to implement value pricing?
- For the recommended location(s), what type of value pricing should be applied?
- What mitigation strategies should be pursued based on their potential to reduce the impact of value pricing on environmental justice communities or adjacent communities?

At key milestones, votes may be taken. Majority and minority opinions may be included in the recommendation.

An ex officio member of the committee will not take part in any votes, but may be asked to provide their insight or expertise in the development of minority or majority statements.

Meeting Protocols

- Meetings will be actively facilitated to ensure that discussions are consistent with the Committee charter and to ensure that feedback and recommendations are advanced from the group in a timely manner.
- Two Oregon Transportation Commissioners will serve as co-chairs for the Committee. In this role they will provide input to meeting agendas and act as active liaisons to the Oregon Transportation Commission.
- The facilitator will be a 'content neutral' party who ensures that all committee members have an equal opportunity to participate.
- Members agree to follow the meeting ground rules agreed to by the Committee as established with the group's facilitator, including:



- Silence electronics.
 - Ask questions of each other to gain clarity and understanding.
 - Express yourself in terms of your preferences, interests, and outcomes you wish to achieve.
 - Listen respectfully, and try sincerely to understand the needs and interests of others.
 - Be curious and willing to learn and contribute.
 - Honor each other by being honest, authentic, and brave.
 - Respect timelines by being concise and brief with comments and questions.
 - Seek common ground.
- Members agree to give the facilitator permission to keep the group on track and table discussions as needed to keep the group moving.
 - Meetings will be scheduled in advance and attendance is important given the limited number of meetings and the fast-paced schedule provided by HB 2017. Members will make their best effort to attend all meetings. Members will notify the facilitator or designated staff in advance if unable to attend and will provide written comments or vote prior to the meeting. Alternates are not allowed.
 - Should members be absent for more than two consecutive meetings, the OTC reserves the right to reconsider their standing membership in the Committee, and may offer their membership to another party. An alternate member may not be nominated to participate in the meeting on behalf of a standing Committee member.
 - Ex Officio members will actively participate in conversations, sharing their perspectives and expertise with the group. Ex Officio members will not participate in votes or the development of minority or majority statements.
 - Public notification of Committee meetings will occur at least one week in advance and the agenda and meeting materials will be made available on ODOT's Value Pricing website.
 - The project will make every effort to ensure meeting materials are finalized at the time of electronic distribution to Committee members, however, there may be instances where updated versions of materials are provided; in these cases, staff will describe the changes. Please review all materials in advance and come prepared to participate.
 - A printed version of materials will be provided to all members at the commencement of the meeting and posted on the website.
 - Meetings will begin and end on time. If agenda items cannot be completed on time, the committee will decide if the meeting should be extended, an additional meeting scheduled, or the discussion continued at the next scheduled meeting.
 - Meeting summaries will be produced for each meeting by the project team to reflect group discussion, feedback, areas of agreement and tasks and assignments related to advancement of the group's work. Draft summaries will be distributed,



and committee members given the opportunity to clarify or edit the summary to make sure it accurately reflects the meeting.

- Meeting summaries will be published online after Committee members have been provided an electronic copy of the summary for their information or clarification if required.
- Members are asked to silence mobile phones and electronic devices and refrain from personal live streaming or other use of social media during the committee meeting sessions.

Communication

- Members will share information with their organizations and/or constituents, gather information from their constituents to help inform committee discussions and encourage their participation in the process.
- Members will not take actions or discuss issues in any way that undermines an open and transparent group process.
- Members will notify designated ODOT staff of all requests from the media. If members do speak with the media, they will clarify that they are speaking as an individual and not speak on behalf of the project or the Committee, nor characterize the points of view of other members.
- The facilitator and supporting staff will be available at and between meetings to address questions, concerns and ideas. The facilitator and staff will respond to all member inquiries in a timely manner.
- The facilitator may contact Committee meeting members between meetings to address any potential areas of concern or conflict that may arise during the committee process.



Portland Metro Area Value Pricing Feasibility Analysis

Committee Member Name	Signature	Date
Tony DeFalco Verde		
Craig Dirksen Metro		
Marie Dodds AAA Oregon		
Chris Hagerbaumer Oregon Environmental Council		
Marion Haynes Portland Business Alliance		
Matt Hoffmann Fred Meyer		2/28/18
Katrina Holland Community Alliance of Tenants		
Jana Jarvis Oregon Trucking Association		2.28.18
Gerik Kransky The Street Trust		2/28/18
Bernie Bottomly TriMet		
Anne McEnemy Ogle City of Vancouver		2/28/18
Sean O'Hollaren Oregon Transportation Commission		2-28-2018
Eileen Quiring Clark County		
Curtis Robinhold Port of Portland		
Roy Rogers Washington County		2/28/18
Brendan Finn City of Portland		
Vivian Satterfield OPAL Environmental Justice Oregon		
Paul Savas Clackamas County		
Alando Simpson Oregon Transportation Commission		
Kris Strickler Washington State Department of Transportation		
Pam Treece Westside Economic Alliance		2/28/18
Jessica Vega Pederson Multnomah County		2/28/18

Portland Metro Area Value Pricing Feasibility Analysis

Policy Advisory Committee Charter



Committee Member Name	Signature	Date
Park Woodworth Ride Connection		2/28/18
Rian Windsheimer Oregon Department of Transportation		2/28/2018
Ex Officio Committee Member Name	Signature	Date
Phil Ditzler Federal Highway Administration		
Facilitator	Signature	Date
Penny Mabie Envirolssues		



ATTACHMENT C: MITIGATION STRATEGY INFORMATION

- C1. Mitigation strategy examples and themes from PAC meeting 4
- C2. Summary of PAC discussion from PAC meeting 4, April 11, 2018



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C1. Mitigation strategy examples and themes from PAC 4

PAC priority mitigation recommendation:
Improved public transportation access and availability

Examples of options deployed in other US tolling programs

- § New transit routes / services on priced roads
- § New / expanded park & ride locations
- § Free HOV2+ or 3+ use
- § More frequent bus service
- § Transit rewards incentive program
- § Benchmark peak period tolls with transit fares
- § Universal pass: link toll accounts with transit accounts

Other PAC considerations

- § Provisions should be in place prior to implementation of pricing.
- § Public transportation options should include carpool/vanpool incentives and options.
- § Benefits should extend to environmental justice, including low-income, populations
- § Concept B has public transportation options but has capacity pressures today.
- § Concept E and the corridor to Stafford Road have very few public transportation options.
- § Explore and clarify eligibility of out-of-state public transportation options under Oregon constitutional restrictions on highway fund revenues.

PAC priority mitigation recommendation:
Special provisions for low-income populations

Future deployment options

- § Discounts, credits, subsidies, and/or rebates on tolls
- § Lifeline tolling registration (e.g. tagged to transit validation)
- § Universal accounts – provide multimodal benefits
- § Cash-based accounts

Other PAC considerations

- § Identify mitigation strategies for low-income populations that have eligibility for Washington residents.
- § Design the system to be clear and easy to use for everyone, including non-English speakers.



PAC priority mitigation recommendation:
strategies to address inappropriate diversion of highway traffic to surface streets

Examples of diversion mitigation

options used in the US Design tolling system to minimize unwanted diversion

- § Traffic calming on impacted arterials and neighborhood streets
- § Advanced traffic management
- § Bans on heavy vehicles from neighborhood streets
- § Improvements for pedestrian and bike infrastructure

Other PAC considerations

- § Note that diversion tends to be very specific to the location and type of pricing program. Future concept implementation would be designed to minimize negative diversion.
- § There are several types of diversion:
 - *Diversion from local system to the freeways* is drawing vehicles back to the freeway that currently are diverting onto the local and arterial road network.
 - *Diversion from freeways to other modes or times* reflects trips shifting to different modes or times of day.
 - *Diversion balancing* is between the I-5 and I-205 – today ODOT manages this balance via variable message signs and other tools
 - *Diversion from freeways to the local system* is traffic diverting onto the local and arterial road network in response to pricing or congestion.
- § More precise origin and destination analysis is needed to better understand diversion to local and arterial roadway network and mitigation needs.
- § All efforts should be made to design pricing concepts to minimize diversion of through traffic from freeways to the local system. (Local traffic should stay on local roads; regional traffic should be carried by freeways.) Diversion mitigation should include considering the termini. For example, Concept E could consider the use of ramp tolls, or other design variations.



C2. Summary of PAC discussions from PAC meeting 4

FINAL Meeting Summary: Policy Advisory Committee Meeting 4

DATE: April 11, 2018

LOCATION: ODOT Region 1, 123 NW Flanders Street, Portland; Conference Room A/B

TIME: 1:30 pm – 4:30 pm

MEETING OBJECTIVE

- Begin transition from learning stage to developing PAC recommendation(s) for OTC consideration, starting with a focus on benefits and strategies to address potential impacts.

ATTENDANCE

Bernie Bottomly (TriMet), Tony DeFalco (Verde), Craig Dirksen (Metro), Phil Ditzler (Federal Highway Administration), Brendan Finn (City of Portland), Chris Hagerbaumer (Oregon Environmental Council), Marion Haynes (Portland Business Alliance), Jana Jarvis (Oregon Trucking Associations), Gerik Kransky (The Street Trust), Anne McEnery-Ogle (City of Vancouver), Sean O'Hollaren (Oregon Transportation Commission), Eileen Quiring (Clark County), Curtis Robinhold (Port of Portland), Paul Savas (Clackamas County), Alando Simpson (Oregon Transportation Commission), Kris Strickler (Washington Department of Transportation), Pam Treece (Westside Economic Alliance), Jessica Vega Pederson (Multnomah County), Rian Windsheimer (Oregon Department of Transportation), Park Woodworth (Ride Connection).

AGENDA ITEMS AND SUMMARY

TOPIC: WELCOME AND AGENDA REVIEW

Facilitator Penny Mabie (Envirolssues) led introductions; reviewed the agenda, Portland Metro Area Value Pricing Feasibility Analysis timeline and meeting materials and provided an overview of the meeting structure.

TOPIC: COMMENTS FROM PAC CO-CHAIRS

Alando Simpson and Sean O'Hollaren (Oregon Transportation Commissioners and PAC co-chairs) provided opening comments. Key points included:



- The PAC is about to cross the halfway point, which is an exciting time. Given the amount of information and interest this project has received, today will be a very impactful meeting.
- It is important to get all issues out on the table, and today's meeting is an opportunity to do so.

TOPIC: PUBLIC COMMENT

Penny welcomed public comments and asked individuals to hold their comments to 90 seconds. The following is a summary of comments heard during the public comment period:

- § I'm very concerned about diversion. We need to get our priorities right. I participated in the Columbia River Crossing process and we looked at the impact of tolling on the I-5 corridor. It was going to be chaos. I've spent my life in supply chain management and creating systems that allow businesses to make money: if we put together a value pricing system that inhibits our ability to do business, it's a lose-lose situation. People I've talked to have said they'd rather pay a higher gas tax or have anything other than a tolling system. We need new capacity. I'm not against tolling if it was part of creating new capacity like a Westside bypass. We can't put a stopper in the road. Ultimately, I don't think we're going to see this work and run efficiently and smartly.
- § The Western Arterial Highway is the most sensible solution because it's not an interstate freeway. It could connect existing highways and improve travel times. Tolling could bring some benefits, but there are factors to consider. Population growth is a consideration. As the economy grows, we have Californians and Washingtonians moving here. And the other factor is more freight. I agree with needing more capacity.
- § Why is the staff rather than the 25 PAC members controlling the process? At the end of the last meeting, PAC members were leaving and a staffer said – we didn't reach a consensus. Who's in charge? It's not the PAC members. The ODOT staff recommended narrowing down the choices. None of the PAC members got to rank their options. Why not? The PAC could have ranked them to include their voices. Staff didn't include option 4 for further study and evaluation. We were told this wasn't advancing due to astronomical cost, but there was no explanation or cost estimates.
- § There is a lot of negativity and denials as far as who will be disadvantaged by Value Pricing. I want to continue to encourage collaboration with Clark County and ODOT leadership. It will be fruitful. When this is done, I hope we can get a new I-5 bridge.
- § West Linn sits on the 205 bottleneck. There is already diversion in West Linn. The city recently got funding to upgrade Highway 43, but imagine what will happen with diversion when Highway 43 is under construction. We recently had a survey – more than 2/3 of respondents said traffic and congestion were major concerns. This is even before tolling. I ask you: don't do any tolling before I-205 and Abernethy Bridge is widened.



- § I appreciate ODOT and this committee's efforts. West Linn is quite distraught about I-205 being left out of the transportation package for adding capacity. My concern is that this well intended effort for value pricing will create a monster on its own, which will distract us from a broader transportation strategy. Value pricing should be used as a tool, but this program won't be available for another 10 years. So, I ask: what are we supposed to do in the next 10 years (when we are already in gridlock and have severe diversion)? With population growth, the scenario is disturbing. We need alternative modes and recommend a broader transportation strategy, such as light rail. We need a better framework to help our communities connect and to address quality of life issues.
- § I am a resident of Northeast Portland. It appears daily working-class drivers don't have seats on this committee. Any tolling will add congestion on local and neighborhood streets. New lanes need to be added and non-tolled routes must be upgraded and easily accessed with signage. The bridges must be toll free and tolling must be contingent on fixing the I-5 bottleneck. Any money must be used to increase motor vehicle capacity, not to subsidize alternative infrastructure. If bike lanes are determined to have value, bicyclists must pay user fees. Tolling is an inequitable money grab.
- § I live in Clackamas County and have a background in materials handling. I go back to the original Legislation in Salem. We started with an \$8-billion bill that went to \$5-billion. One of my biggest concerns was the prioritization issues. What we heard in Clackamas County was that we'll look at tolling and study I-205. This area has the most potential – the growth out there is exploding. We are killing commerce. We are discussing the equity of tolling, at the same time – where does the authorization for tolling come from? How did we get from the legislative bill to here? There isn't discussion of equity. The core issue is that we have a desperate need that isn't being addressed.
- § I am surprised there isn't an option to toll all Portland area freeways, including I-84, US 26, OR-217, I-405, etc. Additional tolled freeways would have the lowest price per vehicle. Second, it is the most equitable. Third, it has the greatest potential to reduce congestion and improve commute times of anything available. Fourth, it is explicitly authorized by House Bill 2017. I encourage the committee to get that option on the table.
- § I haven't heard anyone talk about demand management. The Oregon Legislature made a decision on tolling, so the PAC is doing the best they can on how to implement it, which is their job. I encourage you [the PAC] to keep doing this. I encourage you to think about what we're trying to do: control the demand for highway lanes. I encourage you to keep doing the work and don't be swayed by people who should have made the no tolling argument to the legislature, not here. Think about this being another alternative in addition to more transit. Keep doing the work.
- § In Missouri, I dealt with a lot of the same circumstances. I'm glad the FHWA and trucking is here. I drive the I-5 corridor every day, the biggest thing is: band aids never fix anything. The tolling idea will never fix anything. All it's going to do is push the traffic to the city streets, which are already congested. The City of Portland has accidents every day because of the traffic on city streets. You need another bridge – another corridor. The trucking industry is panicking. If you don't



build a new highway and another bridge, you're never going to get ahead. Also, with the federal government, you can get it done in five years. Have a vision for the future.

- § I think this is an awesome idea. I think congestion pricing is great and you're following the mandate of the Legislature. We have something called induced demand, which means if you build more lanes, more cars will fill the lanes. I would love to see I-5 a transit corridor. The PAC is doing a great job, so thank you.

Penny closed the public comment period by thanking the public for keeping their comments to 90 seconds and encouraging use of additional forms of participation, such as the online Open House.

Penny asked PAC members if they approved the Meeting #3 summary. Comments included:

- § One of the earlier public speakers summarized the meeting well, as far as discussion and lack of direction. We're steam rolling ahead and some of the comments made last meeting don't seem to be recognized. The minutes don't reflect that comment or concern. I'm not asking for edits, but I want to get this on record.

PAC Action: Meeting #2 summary was approved without change.

TOPIC: PUBLIC PARTICIPATION UPDATE

April deLeon-Galloway (Oregon Department of Transportation) and Alex Cousins (EnviroIssues) gave a presentation on the public participation process and results. To date, public participation included: 1,700 visitors to online open house; 3,500 views of the overview video; 260 people at 3 events; 2,100+ completed questionnaires; and 1,200 email and voicemail comments. April and Alex also provided a summary of the Title VI/Environmental Justice discussion groups, including who was involved and what feedback was provided. Key feedback included: congestion is a problem; pressures of population growth are putting a strain on existing road capacity; questions about the effectiveness of congestion pricing; and concerns about disproportionate impacts and affordability of tolling. Alex covered distinctions in March engagement compared to Winter engagement input. Title VI/Environmental Justice groups expressed a stronger reliance on I-5 and I-205; the housing crisis has pushed low income families further out; higher degrees of skepticism that value pricing will work; more uncertainty about impacts; more sensitivity to the financial burden of tolls and less flexibility to change travel times. Throughout the presentation PAC members were encouraged to ask questions and provide comments. PAC member discussion included:

**Responses are indented and italicized.*

- § Do we have access to the questionnaires?
 - *The appendices online include the questionnaire.*



- § Thank you to Judith Gray and her team for making presentations in Vancouver. We are looking forward to another.
- *There will be an Open House in Vancouver on April 30th, 2018.*

TOPIC: PAC WORK SESSION: BENEFITS AND STRATEGIES TO ADDRESS POTENTIAL IMPACTS (PAC DISCUSSION)

Penny transitioned the PAC to the mitigation workshop and discussion portion of the meeting.

David Ungemah (WSP) opened the work session by providing an overview of mitigation strategies to help PAC members with their small group discussions. David began by encouraging PAC members to think about the input environmental justice communities have; how benefits would be shared; what choices would exist and for whom; how impacts would be experienced; and what strategies can be done to better distribute benefits and mitigate impacts. In addition, David said that there are existing inequalities in transportation to consider. He then explained that mitigation pertains to certain rights defined by federal regulation, particularly Title VI of the Civil Rights Act of 1964. Title VI and Environmental Justice include: race, color, national origin, income and limited English proficiency (LEP). Mitigation strategies from other states include incentives and discounts, enhanced multi-modal investments and special access programs, in addition to traffic diversion strategies.

David encouraged the PAC to be creative in thinking of mitigation strategies. David concluded by emphasizing now is the time to think about mitigation techniques, so they can be applied to any pricing concepts that may move forward.

PAC members were divided into four small table groups, with a facilitator at each table. The groups discussed the key concerns heard to date, potential mitigation strategies to address these concerns, key considerations for each strategy and the concept most relevant to the concern. Groups were asked to focus on at least three issues. In addition, project staff circulated the room to answer technical questions. Penny walked the PAC through an example of the worksheet. During the PAC work session, audience members were given a similar version of the worksheet to complete.

**See appendices for PAC meeting materials.*

WORK SESSION: REPORT OUT

Penny led the table facilitators in reporting out on the PAC discussion groups. The following summarizes statements made during the report-out from these discussions.

**See appendices for a complete summary of workshop outcomes.*

Issue 1: Disproportionate impacts on low-income drivers.

Key points on mitigation strategies included:

- Providing a cash-based payment system.



- Providing a priced lane and providing free use of the general-purpose lane.
- Providing transit accessible to affordable housing.
- More affordable housing.
- Priority access to jobs for low-income residents – a job development aspect.
- Provide toll credits for people who take transit.
- Implement dynamic pricing: higher pricing when the roads are congested and a much lower rate when the roads are not congested.
- Focus on strategies for both Washington and Oregon residents.
- Provide transit incentives, discounts, and subsidies.
- Make using modes of transportation seamless.
- § Issues specific to geographic areas should be considered.

Issue 2: How do we know pricing will be effective?

Key points on mitigation strategies included:

- § One strategic consideration is the need for a long-term transportation plan. Given the growth our region is experiencing, we can't have performance measures that are a snapshot in time. We need a long-term metric of success that considers ongoing growth, a short-term metric of success, and to consider tools to employ next.
- § The effectiveness of pricing (issue 2) is tied to how the revenue will be used (issue 7).
- § How is effectiveness defined? Is it reducing congestion, is it raising revenue or some combination of the two?
- § Changing behavior might not work because the options are not currently available (e.g. transit, biking or walking).
- § Consider how to interpret the statute (the constitutional requirements regarding toll revenue and roadway spending)
- § Regarding data points about discretionary trips – there is a lack of clarity and source(s). This data might be outdated.
- § The evidence of success needs to be corridor- and system-wide, and not just focused on a small area.

Issue 3: Traffic diverting to local streets and neighborhoods.

Key points on mitigation strategies included:

- § Discourage traffic moving onto local streets.
- § Improve arterials.
- § Use dynamic pricing.
- § Consider looking at successes elsewhere to understand the history and understand how much diversion occurred.
- § Consider supply side strategy to address available land and transportation options.
- § Provide better and faster transit service.
- § Provide low-income transit fares.
- § Facilitate employer incentives for carpools in toll lanes.
- § People are already diverting onto local streets.
- § More study is needed to understand diversion.
- § Diversion depends on which Regional Transportation Plan (RTP) projects are built.



- § There are issues with transit currently, including unfair policing of low-income as well as low-income fare considerations.
- § Consider how apps like Waze and Google Maps might encourage people to divert onto local streets.

Issue 4: Priced lanes might be confusing and difficult to understand.

No comments.

Issue 5: Some communities and locations don't have other options to driving on the freeway.

Key points on mitigation strategies included:

- Deduct the price of tolls from Washington drivers' income taxes. That could also be a strategy for low-income drivers.
- Add capacity to provide more options while preserving unpriced general purpose lanes.
- Put more transit on the freeways.
- There might be legislative considerations for the income tax suggestion.
- The revenue for increasing capacity could be helpful, particularly for concept A and perhaps concepts C and D.
- People have limited options and low-income drivers need to be considered in a different way.

Issue 6: No transit, biking and walking options exist.

Key points on mitigation strategies included:

- § Increase the availability of transit.
- § Add more transit service or add transit in the first place.
- § All kinds of transit and transit choices should be considered: rail, bus, water, as well as access to those transit options through walking and biking.
- § Create partnerships with agencies to look at pairing investments.
- § Consider the stretch on I-205 with limited or no transit or bike options.
- § Strategies could include more alternative mode options.
- § The team should be looking at examples in other states.

Issue 7: How will toll revenue be used?

Key points on mitigation strategies included:

- § Suggest spending revenue on added capacity and improving infrastructure.
- § There is a disconnect regarding what the revenue can be spent on. There is desire to have that clarified.
- § A user-fee based model is most effective.
- § The PAC needs to look bigger picture for this process and projects, including looking beyond pricing applications on solely the I-5 and I-205 corridors.

Other concerns: Supporting unbanked populations

Key points on mitigation strategies included:

- § Provide a cash-based system in places where transit passes are sold.
- § Develop a universal pass for transit, tolling and bike share.



- § Concern with helping the unbanked population – 16% of non-white people don't have access to banks, while 5% of whites do not have access.
- § The bill by mail option might not work because individuals frequently move.
- § Paying the toll needs to be easy – with low barriers.
- § Undocumented individuals might have concerns with accessing the toll and banking systems.

Penny asked PAC members if they had additional comments on strategies developed at this workshop for the technical team to use for further consideration. PAC member feedback included:

**Responses are indented and italicized.*

- § In general, these are worthwhile strategies to approach the issues we've talked about. But I still question the ability to be specific when there are a lot of assumptions about what our road structure will look like in 2027. I'm concerned about having a realistic idea of what people will be driving on when congestion pricing is in effect. This is something we brought up last meeting, but I want to stress my desire to see more flexibility in the modeling – perhaps as projects are completed.
- § As we were discussing, we had a few realizations – there are some givens as to where this money is going in the short term and the long term. It would be nice to see the list of projects and how they are going to look out over the time line. If tolling is going to be paying for the projects in House Bill 2017 – what is the cost and when are they phased in?
 - *The use of the tolling revenue has not been identified for any particular project(s). This is an OTC decision. In the policy memo, this is addressed – there is a budget note on I-205 which sunsets at the end of the biennium. The PAC can weigh in on how toll revenue could be used. We do have constitutional restrictions and there are policy guidelines, but there isn't a presumption that the revenue will pay for specific projects. This is an area for the PAC to give a recommendation on.*
- § Let's include in our recommendation where revenue should go.
- § There are questions about the timing around conducting an analysis on Title VI. It would be good to have a discussion on how we can possibly speed up some of that analysis.
- § We didn't get to the third column of the worksheet, which applies these strategies to each concept. The objective is unknown: where we're going to spend the revenue, understanding we want to first reduce congestion. Not understanding where the revenue is going will impact our decision on concept A, B, C or D as well as what mitigation strategies we will select.
- § Today we've talked about concerns around tolling and mitigation strategies. A lot of what we've identified is technical and administrative. At a policy level, the point needs to be made that these strategies can't be looked at separately from the tolling plan. They need to be part of it. We should include the reduction of the three regional bottlenecks as part of the tolling program, not separately from it.



Penny asked the PAC members if there were any other last thoughts about the issues, strategies or considerations they wanted to share beyond the mitigation strategies that had been identified in the work session and opened the discussion to any remaining thoughts from the PAC. Member comments included:

- As the technical team goes forward and looks deeper into the options, there are a lot of conversations about transit. These two discussions need to be married in some way. [I sit on the \[House Bill 2017\] Transit Advisory Committee, too](#). How can we make tolling more successful based on where those transit investments should be made? I want to encourage collaboration between ODOT, TriMet and C-tran and the larger transit community. For a lot of these issues, transit is an option. The PAC should be clear with the OTC that you can't talk about one or the other, but you have to talk about both.
- I would like to hear more about how freight is addressed. In the presentation, we heard about how freight can't access the priced lanes, so I'm curious how that gets addressed.

TOPIC: NEXT STEPS

Penny outlined the next steps and provided a schedule for the remaining PAC meetings. Commissioner O'Hollaren closed the meeting by thanking the PAC for their engagement and time:

- This feedback is very meaningful. As a commissioner, what we've heard is hugely helpful.
- We ultimately have a mandate from the legislature to make a recommendation to the FHWA.
- We may need to look at this holistically – not just these two areas, but a whole loop around Portland. It's a three-tiered chess game: There are multiple levels, not all corridors have the same options – there are more viable options in some travel corridors. Can we create more transit options in other corridors?
- We all want to know – where is the money going? The legislature creates a congestion relief fund and leaves it to the commission. The congestion relief fund would go towards congestion relief projects for the corridor.
- Congestion pricing has a myriad of impacts – some change behavior, some incentivize people to look elsewhere to be more efficient. It's on us to create those alternatives and to thoroughly study the impacts.
- We recognize this isn't a crystal-clear process, but the intent is that we've embraced and heard different views and do the best possible job to make a decision. When we do make that decision, it won't address all the concerns, but this is nonetheless helpful for us to make our decision.
- I appreciate everyone's willingness to dive deep. Oregon has a history of being creative and innovative and learning from others – knowing it's not apples to apples. Our unique geography and situation means we can't take what others have done and implement it here. Our neighbors to the north, however, have implemented this and there's a lot to learn from them. Vancouver is part of our



community, and we must look at our broader community to figure out if we can do this holistically.

- We can't buy our way out of this problem: we are growing much faster than our ability to solve congestion. We have a lot to do with some options. We need to get moving and take some steps – there isn't a silver bullet that solves it all.

The meeting was adjourned at 4:20 pm.



Appendix: PAC Work Session Output

WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
<p>Pricing will have disproportionate impacts on people with low incomes or otherwise disadvantaged groups:</p> <ul style="list-style-type: none"> ∅ Toll discounts, subsidize rates and programming ∅ Helping unbanked populations ∅ Bi-state low income strategy ∅ Affordable housing ∅ Transit and transit incentives ∅ Dynamic variable pricing ∅ System technology 	<p>Toll discounts, subsidize rates and programming:</p> <ul style="list-style-type: none"> • For low income groups • For Environmental Justice groups • Carpool and a greater discount for more people in cars • Disabled and seniors should have access to free credit van programs • Enhanced ridesharing and vanpool programs especially in areas without good transit • Discount rates for carpools, and perhaps greater discount for more people in car • Improve arterials so people have a non-tolled option • Employer incentives for carpools and tolls • Credits for transit use 	<p>Toll discounts, subsidize rates and programming:</p> <ul style="list-style-type: none"> • Use existing programs to identify low income qualification • Low income to pay less if already in a qualifying program for low income people eg: snap program (food stamp program) • Environmental Justice communities are located along corridors • Unfair policing of transit fares • Connect decisions with demographic and job data • Some van programs for disabled and seniors should be free or have credits 	<p>Toll discounts, subsidize rates and programming:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Supporting unbanked populations:</p> <ul style="list-style-type: none"> • Cash discounts • Cash-based system such as what is used in the L.A. system • Pass system for transit 	<p>Supporting unbanked populations</p> <ul style="list-style-type: none"> • 16% of nonwhite don't have access to banks • 5% white people don't access bank • Bills and payment by mail may not work because unbanked populations may move more often 	<p>Supporting unbanked populations:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd.



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
		<ul style="list-style-type: none"> • Trouble accessing the systems • Need cash accessible options 	<ul style="list-style-type: none"> <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Bi-state low income strategy:</p> <ul style="list-style-type: none"> • Must apply to both sides of the river. • Consider a Federal Program • Revenue sharing between states for low income strategies • Need reasonable choices as low income is a geographic issue too 	<p>Bi-state low income strategy:</p> <ul style="list-style-type: none"> • Will also have disproportionate impact on specific geographies, and this is linked to the concern that some communities and locations don't have another option to driving on the freeway • Revenue generated in Oregon also be used in Washington to support low-income drivers • These strategies need to be applicable to residents of Washington not just Oregon • HB 2017, 217/Rose Quarter/funded. 	<p>Bi-state low income strategy:</p> <ul style="list-style-type: none"> <input type="checkbox"/> All concepts <input checked="" type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Affordable housing:</p> <ul style="list-style-type: none"> • Housing near transit and near jobs • Priority for low income • Develop jobs in areas where people already live • Priority job access program for lower income 	<p>Affordable housing:</p> <ul style="list-style-type: none"> • Key groups, including low-income groups, may be pushed farther out of the metro area, which compounds low income effect. 	<p>Affordable housing:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St.



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
	<ul style="list-style-type: none"> Make reasonable choices for pricing, knowing what we are buying. 	<ul style="list-style-type: none"> Example of urban renewal impact tradeoff 	and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Transit and transit incentives:</p> <ul style="list-style-type: none"> Shoulder conversion for transit C-Tran services exempt from tolls Tri-Met services exempt from tolls Credits for transit use Transit credits Grow and expand transit options Employer strategies Mechanisms and models to make alternatives, such as the Hop Pass, transit, bike, C-Tran, seamless. Low-income fares for transit affordability Better transit options, more transit and more transit infrastructure 	<p>Transit and transit incentives:</p> <ul style="list-style-type: none"> Constitution: funds must be used back on the corridor itself for infrastructure improvements on the roadway Is there eligibility for funds to be spent on transit on parallel facilities? Can transit funding go to C-Tran and consider incentives for C-Tran use? Creates unfair stress on low income 	<p>Transit and transit incentives:</p> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Dynamic variable pricing:</p> <ul style="list-style-type: none"> Only apply tolls when congested A new priced lane and a new general-purpose lane 	<p>Dynamic variable pricing:</p> <ul style="list-style-type: none"> Difficult to budget with variable public toll rate 	<p>Dynamic variable pricing:</p> <input checked="" type="checkbox"/> All concepts <input checked="" type="checkbox"/> Concept A: Northern I-5 Priced Lanes



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
	<ul style="list-style-type: none"> No tolls at certain times, and only apply toll when congested Variable price when roads are congested (<u>dynamic</u>) 		<ul style="list-style-type: none"> <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>System technology:</p> <ul style="list-style-type: none"> Cash-based payment system for unbanked populations to access Mechanisms to make alternatives seamless such as the Hop Pass (transit, bike, C-Tran) Universal card 	<p>System technology:</p> <ul style="list-style-type: none"> Refunds and discounts Mechanisms for delivery such as the Tri-Met Hop fast pass Need data on the timing and use by Environmental Justice communities What are existing programs to identify low income qualification Data-based decision-making using demographic and job data 	<p>System technology:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
<p>How do we know pricing will be effective? <input type="checkbox"/> Behavior change</p>	<p>Behavior change:</p> <ul style="list-style-type: none"> Pricing a free resource may assist in changing behavior 	<p>Behavior change:</p> <ul style="list-style-type: none"> Need better data to know if discretionary trips are reduced. This drives the capacity question 	<p>Behavior change:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
<p>∅ <i>Information and long term planning</i></p>	<ul style="list-style-type: none"> Changing behavior might not work if there are no other options eg. transit, bike, walk Many trips are discretionary 	<ul style="list-style-type: none"> Need to measure freeway impacts and drivers on routes parallel to the system Adjust based on performance measures and metrics Need to balance between revenue raising and pricing congestion, as what is the goal, to reduce congestion or to raise revenue 	<ul style="list-style-type: none"> <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Information and long-term planning:</p> <ul style="list-style-type: none"> Need comprehensive long-term transportation plan that defines short and long-term tools Congestion pricing to optimize existing resource. Goal is to reduce congestion 	<p>Information and planning:</p> <ul style="list-style-type: none"> Long-term planning and what is the next tool What are the short-term plan/goals? Monitoring and measuring plan Data is old, and this drives the capacity question; more information is needed Freight movement monitoring plan Consider how effectiveness is defined How will this system respond to growth? 	<p>Information and planning:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
	<p>Impact on freight:</p> <ul style="list-style-type: none"> Freight movement monitoring plan Need to account for system-wide impact analysis 	<p>Impact on freight:</p> <ul style="list-style-type: none"> Performance measures and metrics are required to understand how 	<p>Impact on freight:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
		to improve throughput of freight <ul style="list-style-type: none"> Understand system response to growth Metrics and monitoring needed 	<input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
<p>Traffic will divert onto local streets and into neighborhoods</p> <ul style="list-style-type: none"> Ø <i>Neighborhood strategies</i> Ø <i>System capacity and quality</i> 	<p>Neighborhood strategies:</p> <ul style="list-style-type: none"> Traffic calming to discourage diversion Maintain neighborhood streets Advanced traffic management on local streets Dynamic pricing Limitations on Google maps alternative routes and Waze for where people are diverted No heavy vehicles on some streets, specifically local streets Education needed about diversion problems and impact Leaving some lanes unpriced to give people choice 	<p>Neighborhood strategies:</p> <ul style="list-style-type: none"> People are already diverting Lots of success elsewhere to learn from Safety and air quality issues in neighborhoods where diversion may occur Air quality around I-5 Diversion issues where pronounced in Portland on connected streets Understand what would price sensitivity be to diversion more study Traffic calming could strain Portland's existing under-capacity transportation infrastructure 	<p>Neighborhood strategies:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
	<p>System capacity and quality:</p> <ul style="list-style-type: none"> • Diversion onto other state routes including SR-14 and 217, not just local streets • Supply strategy to address road and transit capacity to minimize diversion • Improve arterials specifically where people want to be • Improve arterials so people have a non-tolled option • Address road and transit capacity to minimize diversion • Faster transit service • Swifter transit and increased speed of transit 	<p>System capacity and quality:</p> <ul style="list-style-type: none"> • Maintaining unpriced lanes • Impact depends on which RTP projects are finished and when • Address road and transit capacity to minimize diversion • Diversion impacts need to be looked at as part of the tolling process, an integrated study 	<p>System capacity and quality:</p> <ul style="list-style-type: none"> <input type="checkbox"/> All concepts <input checked="" type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input checked="" type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input checked="" type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input checked="" type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
<p>Some communities and locations don't have another option to driving on the freeway</p> <ul style="list-style-type: none"> ∅ Geographic constraints 	<p>Geographic constraints:</p> <ul style="list-style-type: none"> • Reducing income tax to compensate for cost of tolls for low income or for all (differing preferences) • Provide geographic incentives for people who are more limited non-freeway options • Enhance transit capacity • Transit where limited options • Transit potentiality, even on freeway • If there is an isolated community, lessen the impact 	<p>Geographic constraints:</p> <ul style="list-style-type: none"> • Not sure this is a problem in Portland Metro Area • Clark County doesn't have other options to cross the river • Legislative changes • Disproportionate impact on no transit areas – need own solution • Don't want to undermine the effectiveness of congestion pricing • Deal with the disproportionate impact in other ways, especially for isolated communities 	<p>Geographic constraints:</p> <ul style="list-style-type: none"> <input type="checkbox"/> All concepts <input checked="" type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input checked="" type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input checked="" type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input checked="" type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
	<ul style="list-style-type: none"> • Improve non-tolled arterial options • Use revenue from tolling to pay for new lanes, capacity and transit supply 		
<p>No alternative transit, bike or walking options exist</p> <p>Ø <i>Capacity of alternatives modes</i></p>	<p>Capacity of alternatives modes:</p> <ul style="list-style-type: none"> • Improved transit access due to lack of transit alternatives • Increase availability and frequency of transit services, carpool and vanpool including BRT, LRT and Express busses • Add transit where no options • Create partnerships between ODOT, TriMet, BARD (or another source) to pair these methods CTRAN on shoulders for reliability benefit • More options for I-205 • Build capacity • Linked to how toll revenue will be used. 	<p>Capacity of alternatives modes:</p> <ul style="list-style-type: none"> • Other examples in other states • What most effective alternatives will be • On I-205 there are a lot of miles with no other options (12, 13 miles) and need to expand options • Consider Clark County • All transit options should be considered including bus, light rail, walking, bike, ferry • This should be a decision-making criterion -- current transit access. 	<p>Capacity of alternatives modes:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St. and Multnomah Blvd. <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
<p>How will the revenue be used?</p> <p>Ø <i>Revenue proposals</i></p>	<p>Revenue proposals:</p> <ul style="list-style-type: none"> • Capacity • Columbia River Crossing I-5 bridge replacement • Expanding BRT, LRT, Express buses • Clarify projects listed, can't be hidden, remove disconnect in understanding 	<p>Revenue proposals:</p> <ul style="list-style-type: none"> • There is a current disconnect in understanding • Need projects listed – can't be hidden, needs to be clarified. • Need clarity on how to interpret the statute consistent 	<p>Revenue proposals:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> All concepts <input type="checkbox"/> Concept A: Northern I-5 Priced Lanes <input type="checkbox"/> Concept B: Priced Roadway between Going St./Alberta St.



WHAT WE'VE HEARD	STRATEGIES	CONSIDERATIONS	CONCEPTS
	<ul style="list-style-type: none"> • Improve safety and fix infrastructure • I-5 bridge operation • Need clarity • Use the income where collected • User-fee based model • Congestion mitigation • Low-income mitigation strategies such as cash discounts and free passes 	<ul style="list-style-type: none"> with HB 2017 and the "State Line" • Look bigger picture and look at L.A. for examples • Round One Concept 4 previously not being considered due to cost; but why when we are still deciding where to spend the revenue. • OTC decides where revenue will be spent • Revenue should be used for roadway infrastructure Improvements and back into the corridor itself • Is there eligibility for funds to be spent on transit on parallel facilities • I-5 and 217 are earmarked • Linked to no alternative transit, bike or walking options exist 	<p>and Multnomah Blvd.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Concept C: Priced Roadway – Toll All Lanes <input type="checkbox"/> Concept D: I-205 Priced Lane – OR99E to Stafford Rd. <input type="checkbox"/> Concept E: Abernethy Bridge Priced Roadway
<p>A priced lane may be confusing and hard to understand for some drivers</p>	<p>No strategies listed.</p>	<p>No strategies listed.</p>	<p>No strategies listed.</p>



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ATTACHMENT D: PRICING CONCEPT INFORMATION

- D1. Pricing concept summary sheets and themes from PAC meeting 5
- D2. Summary of PAC discussion at PAC meeting 5, May 14, 2018



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D1. Pricing concept summary sheets and themes from PAC meeting 5

Advance Concept B forward for further analysis



Concept description

§ Convert all I-5 lanes to a priced roadway between NE Going Street/Alberta Street and SW Multnomah Boulevard

Location

§ I-5 through downtown Portland

Type

§ Priced roadway (toll all lanes in both directions)

Federal pricing program

§ Value Pricing Pilot Program

PAC support

§ Multiple PAC members indicated verbal support of this concept as a pilot project for congestion pricing in the Portland metro area.

§ There is good availability of public transportation and active transportation options in the corridor. Additional study and implementation of improved travel options was cited by PAC members as necessary for success of this concept.

§ Pricing all lanes allows all trucks carrying freight to benefit from congestion relief.

Considerations

§ The termini for this concept should be evaluated in future analysis.

§ Consider Concept B a pilot project, coupled with performance monitoring to evaluate success.

§ Consider how I-405 and I-84 would be affected through implementation of Concept B.

§ More precise origin and destination analysis is needed to better understand diversion to local roadway network and mitigation needs.

Additional PAC comment on Concept B

- § Multiple PAC members indicated they would prefer Concept B as a first step to a larger system-wide congestion pricing strategy for the Portland metro area.
- § Several PAC members indicated that Concept B should be the first step toward implementing Concept C.
- § Several PAC members noted that to move forward with any pricing concept there needs to be more certainty that there will be investments made in public transportation, carpool/vanpool and bicycle and pedestrian infrastructure to provide alternative transportation choices.
- § Project team confirmed that the I-5 Rose Quarter Improvement Project was included in the modeling analysis conducted for all concepts.
- § Traffic diversion to local high-crash corridors must be considered in future analysis of all concepts.



Advance Concept E forward for further analysis



Concept description

§ Convert all I-205 lanes to a priced roadway on the Abernethy Bridge, including additional lanes to be constructed as part of the planned bridge widening. The primary purpose of this concept is to raise revenue to pay for part or all of the I-205 widening project

Location

§ I-205 Abernethy Bridge

Type

§ Priced roadway (toll all lanes in both directions)

Federal pricing program

§ Value Pricing Pilot Program or Section 129 of U.S. Title 23

PAC support

- § Concept E paired with Concept B provides for management of both the I-5 and I-205 corridors.
- § Would raise enough revenue to fund a bottleneck relief project that would widen the Abernethy Bridge.
- § Revenue may be sufficient to cover part of the cost of additional lanes on I-205 between OR99E and Stafford Road. Fixing these bottlenecks would help address congestion in this area.
- § Pricing all lanes allows all trucks carrying freight to benefit from congestion relief.

Considerations

- § The termini for this concept should be evaluated in future analysis. Seek design variations to ensure greatest effectiveness and to minimize traffic diversion to the local roadway.
- § Variable toll rates could be used to get some congestion management benefits.
- § Consider extending western terminus toward Stafford Road.
- § Consider when to implement tolling – whether it is before the bridge is widened and during construction or only after bridge widening has been completed.
- § There are limited public transportation and active transportation options adjacent to this concept and strategic investments in multimodal transportation would be needed to ensure success of this concept.

Additional PAC comment on Concept E

- § The overarching principle of congestion pricing as a tool should be to manage traffic demand, not generate revenue.
- § Consider population and employment growth to determine when system capacity is needed.



Seek implementation of Concept C as part of a system-wide solution after pilot project performance evaluation OR move forward with Concept C as the top priority concept



Concept description

§ Convert all lanes on I-5 and I-205 to a priced roadway from the Washington/ Oregon state line to the I-5/I-205 interchange near Tualatin

Location

§ All lanes of I-5 and I-205 in the study corridor

Type

§ Priced roadway (toll all lanes in both directions)

Federal pricing program

§ Value Pricing Pilot Program

PAC support

§ Multiple PAC members indicated they would support Concept C as part of a larger system-wide (beyond I-5 and I-205) congestion pricing strategy for the Portland metro area.

§ Other PAC members indicated that they would prefer implementing C first instead of a phased approach.

Considerations

§ The termini for this concept should be evaluated in future analysis. When considering the termini, evaluate the potential of traffic diversion to the local street network.

§ Availability of public transportation and active transportation options vary widely throughout the region and strategic investments in multimodal transportation would be needed to ensure success of a region-wide congestion pricing solution.

Additional PAC comment on Concept C

- § Several PAC members noted there needs to be more certainty that there will be investments made in public transportation, carpool/vanpool and bicycle and pedestrian infrastructure to move forward with any pricing concept.
- § Several PAC members commented that Concept C has the greatest impacts to safety on local roads and to low-income communities.
- § A comment was made to bring back "Option 4" for consideration. This was a reference to the round 1 evaluation concept that looked at adding new priced lanes (a fourth lane) the length of I-5 and I-205 between the state line and the I-5/I-205 interchange.
- § Public acceptance appears weak for residents in Southwest Washington.



Do not advance Concept D forward for as a standalone concept



Concept description

§ Price future additional third lanes in each direction currently planned but not funded for construction on I-205 from OR99E to Stafford Road, including widening of the Abernethy Bridge

Location

§ A single lane in both the eastbound and westbound directions of I-205 between OR99E to Stafford Road

Type

§ Priced lane (toll a single lane in each direction)

Federal pricing program

§ Section 129 of U.S. Title 23 or Value Pricing Pilot Program

PAC support

§ Multiple PAC members recommended Concept E be considered and evaluated with possible start and end points along the D corridor (See Concept E recommendation, page **Error! Bookmark not defined..**)

§ Freight reps noted concern that pricing a single lane prevents freight trucks over 10,000 pounds from benefiting from congestion relief in the tolled lane.

Considerations

§ Per vehicle toll price is noticeably higher than a toll- all-lanes concept.
 § Concept D would not provide sufficient tolling revenue to fund the planned third lane of I-205 between Stafford Road and OR99E, including the Abernethy Bridge widening.

Additional PAC comment on Concept D

- § The priced lane option, as opposed to priced roadway, provides a choice for motorists that do not want to pay a toll and allows them to remain on the highway.
- § Does not generate enough revenue to pay for corridor widening based on estimated revenue.



Do not advance Concept A forward



Concept description

§ Convert an existing general purpose lane in the southbound direction, and the existing HOV lane in the northbound direction to a priced lane

Location

§ A single lane in both the northbound and southbound directions of I-5 between NE Marine Drive and NE Going Street

Type

§ Priced lane (toll a single lane in both directions)

Federal pricing program

§ Northbound lane: HOV/HOT Lane Program (Section 166);
§ Southbound lane: Value Pricing Pilot Program

PAC support

§ No PAC members requested to keep Concept A for further consideration.
§ Freight reps noted concern that pricing a single lane prevents freight trucks over 10,000 pounds from benefiting from congestion relief in the tolled lane.

Considerations

§ Concept provided minimal congestion reduction.
§ Per vehicle toll price is noticeably higher than a “toll all lanes” concept.
§ Under existing state law, freight is prohibited from using the left-most lane, and as such would be excluded from the priced lane concept.

Additional PAC comment on Concept A

§ The priced lane option, as opposed to priced roadway, provides a choice for motorists that do not want to pay a toll and allows them to remain on the highway.



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D2. Summary of PAC discussion from PAC meeting 5

FINAL Meeting Summary: Policy Advisory Committee Meeting 5

DATE: May 14, 2018

LOCATION: ODOT Region 1, 123 NW Flanders Street, Portland; Conference Room A/B

TIME: 9:00 am – 12:00 pm

MEETING OBJECTIVE

- Shared understanding of the remaining Policy Advisory Committee (PAC) recommendation process
- Review and discussion of themes and priorities from PAC 4 and public outreach
- Review and discussion of findings from Round 2 concept evaluation
- Discuss initial draft PAC recommendation framework

ATTENDANCE

Bernie Bottomly (TriMet), Brendan Finn (City of Portland), Tony DeFalco (Verde), Craig Dirksen (Metro), Phil Ditzler (Federal Highway Administration), Marie Dodds (AAA Oregon Idaho), Marion Haynes (Portland Business Alliance), Jana Jarvis (Oregon Trucking Associations), Gerik Kransky (The Street Trust), Anne McEnery-Ogle (City of Vancouver), Sean O'Hollaren (Oregon Transportation Commission), Eileen Quiring (Clark County), Curtis Robinhold (Port of Portland), Roy Rogers (Washington County), Vivian Satterfield (OPAL Environmental Justice Oregon), Paul Savas (Clackamas County), Alando Simpson (Oregon Transportation Commission), Kris Strickler (Washington Department of Transportation), Pam Treece (Westside Economic Alliance), Jessica Vega Pederson (Multnomah County), Rian Windsheimer (Oregon Department of Transportation), Park Woodworth (Ride Connection).

AGENDA ITEMS AND SUMMARY

TOPIC: WELCOME AND AGENDA REVIEW

Facilitator Penny Mabie (EnviroIssues) led introductions and reviewed the Portland Metro Area Value Pricing Feasibility Analysis timeline, meeting agenda and meeting materials. She notified the PAC she would be calling on all members during the meeting discussion to make sure all voices were heard. Penny asked PAC members if they had any concerns regarding the meeting minutes.

PAC Action: Meeting #4 summary was approved without change.



Penny made a brief process note regarding the end of the PAC meeting 3 and the five concepts that were selected for the round 2 evaluation. At the end of meeting 3, Penny made note that there was not a consensus, which was to be expected as the PAC is not a consensus group. She then turned to Judith Gray, (Project Manager, Oregon Department of Transportation), and asked if she had received the necessary information to bring back to the technical team to inform the round 2 analysis. The intent of this question was to ensure Judith had the necessary input from PAC to allow the project team to move forward. Penny noted the PAC's input was heard throughout the PAC meetings and included in the selection process of the five concepts.

Penny introduced Judith Gray to provide an overview of the meeting process. Judith informed the committee that between PAC Meeting 5 and the final PAC meeting in June, the Oregon Department of Transportation (ODOT) staff's priority is to support the PAC and help inform their deliberations as the PAC comes to a recommendation. Judith outlined a framework for the PAC's recommendation: 1) recommendation context, 2) pricing recommendations (type and location) 3) priority mitigation strategies for further consideration, 4) other topics important to the PAC and 5) individual PAC member comments, which will be attached to the PAC recommendation without modification.

TOPIC: COMMENTS FROM PAC CO-CHAIRS

- Thank you to the PAC members for their participation. There is a lot of passion on this issue; some are passionate with few words and others take more. The written option is there to encourage further participation and we will follow-up and look forward to hearing from everyone.
- This is a very important conversation. It is consuming a lot of time and there is a lot of energy, focus and attention on it. The Oregon Transportation Commission (OTC) and ODOT are making concerted efforts to keep many people informed and provide feedback on this process and how we move forward.
- The key is to be open at the table and keep the conversation flowing, which will hopefully carry onto more suggestions and input for the OTC meeting this Thursday, May 17.

TOPIC: PUBLIC COMMENT

Penny opened public comment and requested 90 seconds per comment. She noted audience members are not required to make public comment; they can send emails to the PAC or submit a comment card in writing or online. Public comments included:

- Thank you for this time. I went to the open forums, which were informative, but they were not a place where we had an opportunity to speak. I'm taking time off to come here today and 90 seconds is not enough time to hear from the public. For me, congestion pricing is a burden shift to the people who have the least to give and those who live in the outskirts. These people are the ones who have the least control of when and what time they can drive. They will be the most affected. Second, congestion pricing does not solve traffic congestion. The



PAC should focus on educating drivers about behavior, such as tailgating and technologies like cruise control. Ultimately, this should be a focus on looking at mass transit, instead of adding lanes or reducing the number of cars. Also, the Westside Bypass would help.

- The North Clackamas Chamber of Commerce is generally in support of the concepts being talked about here. Traffic is an impediment to business in Clackamas County. Regarding the proposals, tolling all lanes on I-5 and I-205 is not the favored concept because it would shift traffic to alternative routes and surface streets to the detriment of the community. Pricing by hours and lanes seems to be the preferred avenue. All of this is clearly a means to get better capacity out of the system we have. Whatever funds are raised need to be designated to the additional lane on I-205.
- We are having this discussion because Oregon needed economic recovery in the 1980s. A Western Arterial Highway is the most sensible and effective solution when we look at the money dumped into tolling and adding lanes. HB 2017 mandated the OTC look at proposals for cost effectiveness, so I urge you to look at this and its cost effectiveness. Public transit could use this facility, as it would make connections. We could even do something like a Western Arterial Highway on the Eastside. We need to get this studied.
- I cannot support plans to toll all lanes on I-5 and I-205. In Seattle, the tolling cost is \$6.00 with a \$2.00 discount for those with a transponder. How much of this toll will go to the private tolling company? According to the Washington State Transportation Commission, they estimate 35 percent. According to Mandy Putney (ODOT): "Some of these scenarios might not raise much more than the cost to cover the operations of the tolling system." Then what is the point? Adding a tolled lane on I-5 and I-205 is the only option to relieve congestion, but option 4 (add a lane to I-5 and I-205) has been eliminated by staff. I urge the PAC to support option 4.
- How many cars need to be removed from I-5 and I-205? You haven't told us: why not? ODOT's Don Hamilton has been telling citizens this is about behavior modification. Let's have all public servant government employees modify their behavior. I'd like to see the 25 PAC members take a bold step and demand option 4 be added back. Abandon your Band-Aid and begin fixing the problem. Jana Jarvis said the trucking industry was promised added lanes. Do not kick the can down the road – the PAC is the one in charge. Band-Aids and behavior modification will not fix the issue.
- The North Clackamas County Chamber of Commerce has had numerous conversations about congestion pricing. Our organization supports the business community and our citizens. Adding a tolled lane is the solution to decrease congestion. Taking a shoulder for transit does not make common sense. The toll revenue needs to stay within the roadway that is tolled. Transparency, honesty and respect are important. We need to distinguish tolling versus congestion pricing. Last, the chamber is concerned about diversion safety.
- The only action to reduce congestion is congestion pricing. Freeway widening will work for a few years, but induced demand will take over. Please institute congestion pricing on our freeways, but it must be implemented equitably. Low-income mitigation must be included in the package, and we need better transit.



The funds need to be invested in better transit service to encourage a safe and convenient economic system. Oregon Goal 12 says a transportation plan must minimize adverse social and environmental impacts. Dedicating the funds to transit will accomplish that.

- The Association of Oregon Rail and Transit Advocates supports congestion pricing. However, we think the equity issue has not been addressed the right way. There is no bus service on I-205, but it is needed. Increased capacity should be in bus seats, not additional vehicles. ODOT should be paying for bus services because TriMet only has one line on the freeway; there is no all-day, 7-day a week service. Buses on the freeway could connect suburbs and benefit those too old to drive or who cannot afford to drive – and that’s an equity issue.
- Regarding the materials for today, some PAC members might think the impacts are not as bad as expected, some might think they are worse, some might not understand the analysis and some might not trust the analysis. I hope that you [the PAC] will continue the process and not give up because you do not understand it right now. We’ve tried all the tools, ODOT and WSDOT [Washington Department of Transportation] and others have added a great deal of capacity in these corridors and a lot of transit service and bike connections. We need to test this tool [congestion pricing] just like our peers have.
- From the Oregon Environmental Council, thank you for your hard work. Congestion has impacts on quality of life, our economy and the environment. It is a hidden tax on the economy. Many neighborhoods were destroyed by freeways. We all pay for freeways whether we use them or not. The Policy Advisory Committee must seek the best outcome for our most vulnerable communities. The most equitable and sustainable solution is putting a price on roadways during peak hours. Reducing congestion will clean our air, reduce our carbon footprint and keep our economies growing. Congestion pricing must also be accompanied by significant improvements on transit.
- The No More Freeway Expansion organization believes this work is the only way we will ever solve congestion. Expanding freeways has never worked. We should invest in decongestion pricing with the revenues put into transit investments. Our letter was signed by 250 people across the region. Folks are interested in air quality, climate justice and improving public health. ODOT is considering expanding freeways. This is an intergenerational theft issue. It may be difficult to tell your constituents but look to decongestion pricing in other cities. As soon as it was implemented, it had massive approval. This is one of many issues in the next few years. Thank you.
- Climate Solutions imagines an equitable northwest powered by clean energy. That’s why we are strongly supportive of this process and value pricing. Expanding capacity does not work. It did not work in Houston and Los Angeles. It is bad for drivers and the environment. Transportation is the single largest source of pollution in Oregon at 40 percent. Congestion pricing is an effective tool to reduce pollution. We encourage Oregon to be bold like those in Stockholm and London. We encourage the PAC to design solutions that prioritize communities of color and other historically marginalized groups. This is possible while also moving with urgency. The federal government is undoing emission standards and we



need the west coast to step up. Congestion pricing has the ability to improve lives by getting people out of traffic. Thank you for your efforts.

TOPIC: PUBLIC PARTICIPATION UPDATE

Anne Pressentin (EnviroIssues) provided an update on public participation. There has been extensive outreach since PAC meeting 4 to inform and engage the public. More than 180 people attended 5 recent open houses (bringing the total to 8) and more than 6,500 visited the online open house. In addition, there was social media, news coverage and opportunity to comment via email. Results show similar themes to the winter engagement in January 2018. One theme is that congestion is a problem but there is disagreement about what to do about it: over half of the people who participated are already changing their travel patterns to avoid congestion. Most people who responded to the survey said they would try to find an unpriced route if roadways were tolled. Concepts that maintain an unpriced lane had generally more support than those that did not. Note that this survey is not statistically representative of the entire community. The full report is online and printed as part of the PAC member materials.

TOPIC: MITIGATION STRATEGIES AND PRIORITIES

Penny introduced Kirsten Pennington (WSP) and David Ungemah (WSP) to present on mitigation strategies and priorities.

Kirsten outlined major mitigation themes from the PAC: special provisions for the low-income population, such as discounts, subsidies and cash-based options; improved transit access, affordability and availability – a change in behavior requires travel options; diversion strategies; and skepticism – the importance of demonstrating value and the need to monitor and evaluate the program post-implementation. Other issues include connecting revenue with congestion relief and transportation system improvements; regional congestion pricing analysis; planning for growth (by providing both transit and roadway capacity); and ensuring congestion pricing is designed for all users including those who may not speak English as their first language. PAC comments included:

- Add: We are looking to distribute benefits to the entire area that is impacted.
- Carpooling has been mentioned in several places but did not make it into the general description. I suggest adding one sentence on page 3, which says carpool and vanpool be expanded when transit cannot appropriately serve the commuter.
- Regarding the I-205 section: the mitigation language in the packet is quite vague as it relates to solutions. As someone who knows the geography and the landscape, we need to think ahead as the population changes and grows.
- Expanding capacity was mentioned on several occasions. Mitigating the surrounding communities for what they actually pay in tolls is a wise choice.
- First, mitigation for transit: add investments as well as new routes and services. Investing in transit infrastructure is important to clarify; those are the types of



investments we would like to see. Second, there is still confusion with adding lanes. In the models, there are projects assumed to be completed, including the I-5 Rose Quarter Improvement Project and the Abernethy Bridge widening (from Stafford Road to OR99E). That needs to be crystal clear. We are not talking about the roads as they stand today but as they stand in the Regional Transportation Plan (RTP). This includes transit investments, such as the Southwest Corridor LRT Project.

- Without increasing roadway capacity, there is very little value to Washington County. I appreciate the work but not adding [roadway] capacity is a nonstarter. The Rose Quarter, I-205 and Abernethy Bridge widening are critical to Washington County. If we are going to toll, what is going to happen with the tolls revenue? Without adding capacity all we can say is that this has been a wonderful educational experience.
- We might consider having free lanes during less congested times as a mitigation strategy for diversion. A key issue around the table is transparency; being very clear about what we are doing and where the revenues are going. Make sure a regional congestion pricing analysis is continuing and discussion about how we can potentially move that forward.
- I want to emphasize what I heard from public comment regarding the education needed for drivers, especially limited-English speaking populations.

Kirsten emphasized that PAC member comments have been consistent with public comments and input. Key themes from the public include: provisions for low-income communities; skepticism about whether pricing works; ideas about how and where to spend revenue; transportation capacity not keeping up with growth; and fairness is key.

David Ungemah (WSP) presented on potential mitigation strategies that align with themes from the PAC and the public. He began with a roadmap, which emphasized that the project is just beginning and there are mitigation considerations at numerous stages from a region and statewide planning process, and there are several places along the roadmap where a decision to not proceed with a pricing concept may be made. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- [Regarding the roadmap] is it possible to do a budget projection for all the exit points ["off-ramps" from implementing pricing]? This would have been helpful for the Columbia River Crossing project.
 - *That is difficult to estimate at this point in time, because it depends upon the scale and scope of the project. For example, if you are looking at using bonds, that takes high-level financial advisement and costly studies. Under this example, the answer is a few million dollars. Notably, at each of these stages the region can change direction and continue forward on a different path. For example, during the National Environmental Policy Act (NEPA) process, the region might come up with different alternatives that are equally desirable to the community. Even if this does not have a pricing component, the project can still advance.*



- If the PAC recommends a bistate solution, where would the constitutional limitations be addressed in the roadmap?
 - *The first place would be in the application to the FHWA. The value pricing team at FHWA headquarters has experience with this. For example, congestion pricing in Virginia is right at the Maryland border [Constitutional limitations would ultimately be addressed following the application to FHWA.]*
- Is Virginia the only cross-state example?
 - *North Carolina's program currently under construction is close to the South Carolina border.*
- [Regarding Technical Memorandum 4] where does the origin-destination data come from?
 - *Metro's regional travel demand forecast model, which Chris Swenson (WSP) will expand on when he presents the round 2 concept evaluation results.*

To address the first theme, "special provisions for low-income populations," David explained options including discounts, credits, subsidies and/or rebates on tolls; lifeline tolling registration, universal accounts; and cash-based accounts. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- Regarding the mitigation strategy to provide \$25 toll credits to those making over \$49,200: Can you explain these numbers?
 - *The example comes from Los Angeles, which has two facilities that feed into downtown and cross through communities with low-income populations. The Los Angeles board convened focus groups, and learned the initial seed money for a debit-based account was a burden for the unbanked population. The \$25 credit covers that initial cost. The \$49,200 number represents an income threshold to obtain credits for different households and income levels. In Los Angeles, a household with 4 people making less than \$49,200 qualifies for the one-time \$25 credit. In addition, riding transit also builds toll credits. This is a great way to encourage individuals to ride the bus when they can, but when they need to jump on the tolled system, they have credit.*

To address the theme, "improved transit access and availability," David explained options including new transit routes/services on priced roads; new/expanded Park & Ride locations; free High-Occupancy Vehicle (HOV) 2+ or 3+ use; more frequent bus service; transit rewards incentive program; benchmark peak period tolls with transit fares; and universal pass – link toll accounts with TriMet accounts.

To address the theme, "diversion strategies," David explained options including design to minimize unwanted diversion; traffic calming on impacted arterials and neighborhood streets; advanced traffic management; bans on heavy vehicles from



neighborhood streets; and improvements for transit, pedestrian and bike infrastructure. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- When diversion is discussed, I never get a very good sense of the extent of diversion. I heard the comment that people divert because of congestion. There are also apps with a system telling individuals about tolls and how to avoid them. It seems the potential for diversion is significant. Understanding the extent of diversion would be helpful.
 - *In terms of diversion, there are positive and negative diversions. Less desirable is route diversion. The definition of diversion changes throughout the process. At this point, diversion refers to route diversion, which requires detailed data analysis to fully understand. During the NEPA scoping process, a refined understanding of diversion would help us understand how travelers are traveling through and within the network.*
- All pricing strategies will be refined during NEPA, but a better understanding of diversion would be helpful. We need to appreciate the opportunities that exist under value pricing through tolling to generate revenues. I don't know if the group understands this opportunity.

To address the theme "other considerations: connecting revenue with congestion relief and system improvements," David explained options including infrastructure trust fund – e.g. expand capacity, in-line bus stations, Park & Rides, arterial enhancements, multi-modal/multi-use, active traffic control, demand management and shared mobility services); and user-oriented policies, such as revenue dividends and FAIR lane distributions.

To address the theme "other considerations: making sure pricing works," David explained skepticism often increases until congestion pricing projects are implemented and can demonstrate success and transparency. He provided options including trial/pilot systems, performance standards, monitoring and reporting and partner coordination.

TOPIC: KEY FINDINGS FROM ROUND 2 CONCEPT EVALUATION

Penny introduced David Ungemah (WSP) and Chris Swenson (WSP) to present key findings on the five concepts from the round 2 concept evaluation. David explained these concepts were selected because they have positive levels of cost effectiveness. Note that they have different effects. Concepts A through D are meant to relieve congestion. While Concept E has the benefit of relieving congestion, it was tested for revenue potential and provides a perspective on how to complete the system in terms of what has been funded.

Chris Swenson (WSP) explained key findings and considerations for each concept.

Concept A: Northern I-5 Priced Lanes



Key findings include: minimal congestion reduction; limited diversion; revenue and capital costs are relatively low; maintains two unpriced lanes in each direction but has the highest toll amount per vehicle. In the model, the average toll per mile is \$1.45 in the AM peak, \$1.05 in the PM peak and \$0.34 daily. Per trip modeled toll rates were around \$5.00 in the AM, and about \$3.60 in the PM. It is critical to remember that these toll prices are not proposed toll rates, rather they are used to compare the concepts in the model. The toll price also reflects that pricing only one lane makes the per vehicle toll higher. Considerations include: mitigation strategies for land locked areas; FHWA HOV/HOT lane program for the northbound lane and FHWA Value Pricing Pilot Program for the southbound lane. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- When we talk about the toll prices, this is not what is being proposed. This is what is being used in the models and used to evaluate the concepts.
 - *That is correct.*

Concept B: I-5 Priced Lanes – Toll All Lanes between Going St./Alberta St. and Multnomah Blvd.

Key findings include: congestion reduction and time savings; travel time savings to area Title VI/Environmental Justice communities; modest diversion with increased vehicles per lane per hour on I-5; and a dense network of transit and multi-modal facilities. Considerations include: mitigation strategies could include increased transit service, low-income toll rates and other strategies; and FHWA Value Pricing Program. In the model, the average AM peak hour toll per trip for Concept A is about \$5.00 whereas for Concept B the average AM peak hour toll per trip is \$2.02. For Concept B, the average PM peak hour toll per trip is \$1.55 and the average daily toll per trip is \$0.78; the daily average toll per mile is \$0.34.¹ These toll prices are not proposed toll rates, rather they are used to compare the concepts in the model. The potential annual gross toll revenue estimate for Concept B is \$50 million (in 2017 dollars).² PAC member discussion included:

Project team clarification and responses are indented and italicized.

- Comparing Concept A to Concept B, it seems the cost is higher because the administration cost is the challenge. What is the administrative cost and how is that evaluated – on a per mile or per area? Is there some kind of scale?
 - *At this point, we are not deciding how this could be implemented, so we do not know the exact cost. In general, the more tolling transactions you have, the less each transaction will be. For example, if you go from tolling 10,000 to 100,000 vehicles, the per vehicle transaction cost will drop. However, the overall administration costs will increase.*

¹ This was a misstatement. The modeled daily average toll per mile for Concept B is \$0.10. Concept A has a modeled daily average toll per mile of \$0.34.

² Portland Metro Area Value Pricing Feasibility Analysis, Round 2 Concept Evaluation: Technical Memorandum 4



- Can you tell us how the model evaluates travel time savings?
 - *The model looks at time savings by area. The project team generated a heat map, which shows travel time savings. Metro uses a MCE (Multi-Criteria Evaluation) tool that makes specific evaluations of areas that have higher average concentrations of Title IV and low-income residences than the metro-area.*
- Was I-405 considered in the modeling? I'm thinking about the impacts of diversion and how it might breakdown the system in downtown Portland.
 - *No. However, because we saw traffic increases on I-5 compared to the baseline, I'm not positive that indicates we will have a major diversion issue.*
- The tolling is proposed to start on Going Street, so a lot of the diversion could clog up I-405 north of I-5.
 - *To your point, trips would only be avoiding one toll collection point.*
- The diversion would be outside of the toll area.
- The assumed toll price for each concept except for Concept E is a per mile toll, correct?
 - *Yes, there is not a cordon toll in the models. For Concept B: the per mile toll in the model is much lower than in Concept A.*

Concept C: I-5 and I-205 Priced Roadway – Toll All Lanes

Concept C is much more complex than Concept B. Performance metrics would be used to tune the system to have the desired effect. Key findings include: greatest regional congestion reduction and travel time savings; enhanced jobs access for Title VI/Environmental Justice communities; high probability of diversion, which could be minimized with dynamic tolling; and transit and multi-modal facilities can serve as alternatives, though accessibility varies. Considerations include a phased implementation; mitigation strategies could include increased transit service, low-income toll rates and other strategies; and generates the largest amount of revenue compared to other concepts. Overall, under Concept C the system is operating much more efficiently than currently and would continue into 2027. In the model, the average toll per trip is about \$3.25 in the AM peak, \$3.15 in the PM peak and \$1.39 daily; the average toll per mile is \$0.38 in the AM peak, \$0.37 in the PM peak and \$0.17 daily. These toll prices are not proposed toll rates, rather they are used to compare the concepts in the model. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- Which routes would be most impacted by those trying to divert around the tolls?
 - *That is difficult to say because at this time the modeling only details net diversion. The model is showing us three to five percent net diversion. Diversion would logically impact the parallel routes closest to the tolled facilities. We cannot tell you which route will have the most significant impact. Overall, we are looking at significant reduction in hours traveled and we should have a much better performing network than we do today.*



- Why is the impact on freight throughput so modest in all concepts? There is a surprising difference between freight and vehicle throughput. Travel times for freight is greatly reduced, but throughput increase is modest.
 - *We are seeing a normal balance between tolls and decreased travel times. We are trying to balance the cost of a toll and the value of travel time savings. In addition, the model has a set number of trips, so that creates limitations.*
- With Concept A, you are not seeing an increase of C-TRAN travel trips.
 - *Correct.*
- When you looked at diversion, did you do an analysis of how diversion would impact existing transit?
 - *The modeling is a high-level analysis. The model does not go into the detailed level of route assignments. That detailed level of modeling, which goes from macro to micro level and microscopic analysis, would be very appropriate in the next step of the (NEPA) analysis. At this broad level, we ask, how would this work as a system? Then we can get into the details during subsequent steps.*
- Regarding the three to five percent diversion - under this option, the round 1 evaluation showed 80,000 trips diverted: is that 80,000 option part of the three to five percent?
 - *We would take a deeper look at diversion in future planning phases.*
- In defining "good" and "bad" diversion, can you explain what definition you are using?
 - *In this context, diversion means "net diversion," in terms of the amount the throughput is dropping in that segment.*

Concept D: I-205 Priced Lane – OR99E to Stafford Road

Key findings include: minimal congestion reduction; minimal diversion; few transit and multimodal travel options; and maintains two unpriced lanes in each direction, but toll amount per user would be higher. Considerations include FHWA allows tolling outright due to added capacity. In the model, the average toll per trip is about \$5 in the AM peak, about \$2.75 in the PM peak and \$1.21 daily; the average toll per mile is \$1.05 in the AM peak, a little over \$0.50 in the PM peak and about \$0.15 daily. It would raise an estimated \$20 million in annual revenue, which would cover its toll collection costs only. These toll prices are not proposed toll rates, rather they are used to compare the concepts in the model. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- Would the toll support construction of the third lane?
 - *The \$20 million is the total gross revenue. It would not support construction.*
- The toll price is what the model is showing relative to the other concepts. This is not the proposed toll.
 - *Correct.*

Concept E: Abernethy Bridge Priced Roadway (tested for revenue potential)



Key findings include congestion reduction and travel time savings for drivers on I-205; some traffic diversion to I-5, particularly freight; and probability of diversion to local facilities. Considerations include mitigation strategies needed, such as increased transit service, low-income toll rates and others. The concept would likely generate sufficient Abernethy Bridge project funding and a portion of the funding for the planned third lane on I-205. Concept E would generate about \$50M per year which, if bonded, would potentially cover the construction expense for the Abernethy Bridge rehabilitation and bridge widening as well as some, probably not all, of the new lane on I-205 between Stafford Road and the eastern terminus of the bridge. These revenues are not based on proposed toll rates, rather they are used to compare the concepts in the model. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- I was a little disappointed in this because of the way this model had to be done. The freeway has two lanes today and the model makes it three. The report is a little misleading, but the revenue generation piece was very informative. Did you consider looking at this with something like the Rose Quarter to manage both corridors?
 - *No, a comparable revenue analysis was not done for the Rose Quarter.*
- I struggled with Concept D and Concept E. These seem to be revenue generating concepts. That piece is needed for revenue generation, not for congestion pricing.

The consultant team provided the following recommendation:

- Concepts A and D not move forward in analysis.
- Initial implementation of Concept B as pilot pricing program, coupled with performance monitoring to evaluate success and scalability;
- Consider implementation of Concept E concurrent with Concept B to balance the system;
- After assessing performance of initial pricing project (assuming successful evaluation), consider implementation of Concept C in phases with comprehensive system analysis; and
- Develop mitigation strategies for low-income and adjacent communities.

TOPIC: PAC INITIAL RECOMMENDATION(S) DISCUSSION

Penny facilitated the discussion, walking the PAC through each piece of the consultant team's recommendation. She noted that it is ultimately the PAC's recommendation that will be forwarded to the OTC, but that the consultant recommendation would be used as a starting point for discussion. Chris Swenson (WSP), David Ungemah (WSP) and Kirsten Pennington (WSP) provided answers to clarifying questions throughout discussion.

**See attachment for a transcription of flip-chart notes taken during the meeting.*



Recommendation topic: Do not implement concept A or D. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- I am comfortable not implementing A or D. However, don't lose the thought of looking at Concept D tolling limits with Concept E.
- When we looked at Concept E, we talked about paying for the bridge. I need to understand what part of the bridge we are paying for.
 - *We would get to that further in the process. Again, all the toll prices will change. These prices and the revenue they generate are used in the modeling to compare concepts.*
- If we are going to build a new bridge, we need to add a third lane.
- I would like to see Concept D and Concept E together.
- I do not want to discard A or D, nor am I proponent of A or D. However, I do not want to take a priced lane concept off the table. In concept C, we are creating the problem of diversion by tolling all lanes.
- It seems Concept A and D address a supply-side issue. This issue exists in A or D, and not in the other concepts.
- I support removing A or D.
- I support not implementing Concept A, but agree with the previous comments regarding Concept D.

Judith Gray (Project Manager, ODOT) requested PAC members display thumbs-up in support of or thumbs-down in opposition to the consultant recommendation, "do not implement Concepts A or D." Of those PAC members who participated, many were supportive of the consultant recommendation, "do not implement Concepts A or D." However, many of the comments bulleted above to retain Concept D when considering Concept E were made after the thumbs-up/thumbs-down assessment was made.

Recommendation topic: Initial implementation of Concept B as pilot pricing program, coupled with performance monitoring to evaluate success. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- Concept C has strong performance. If we move towards Concept B, I'm curious to see the connection between a successful pilot in Concept B and Concept C.
- I would like to see the modeling on origin-destination data on Concept B.
- Does the initial implementation of Concept B mean that Concept C would not be further modeled?
 - *Concept C could still exist in a regional system plan. In terms of the NEPA analysis and next steps, Concept B would be the only concept moving forward in the consultant recommendation.*



- Moving forward with Concept B: we have heard loud and clear there is a strong interest in considering planning efforts for an expanded model, not just Concept C, but region-wide. That concurrent effort is going to be something we are doing moving forward.
- One consideration is to look at the diversion on N Lombard Street, and whether you could extend the starting point further north.
 - *As we get into more detailed travel demand modeling that would be an appropriate time to analyze extending the starting point.*
 - *It is very useful to hear this type of idea from the PAC. The discussion the PAC has now will inform the recommendation to the OTC, even though this topic will be dealt with at a further stage in the process.*
- Relative to Concept B and more generally: I am getting nervous about the lack of clarity and certainty in terms of reinvestment in transit. I'm hearing a lot about how the model looks at existing transit. In my mind, none of these concepts can go forward without the certainty of investments in transit. Second, I appreciate the efforts of staff to hear the mitigation strategies in terms of low-income. I want to go further than mitigation and create a system that inflicts no harm.
- I want to clarify that HB 2017 called for expansion of I-5 through the Rose Quarter.
 - *Correct. The I-5 Rose Quarter Improvement Project is included in the model.*
- I question the transit capacity to take any additional trips. I am also concerned about the diversion onto I-205. For Concept B to move forward, I would want some sort of tolling on I-205 to be considered.
- From a Port of Portland context, we like to look at the long game: Concept B should be considered as just a piece of how you get to Concept C. We want to look at the 20- or 30-year vision.
- My communities largely reside east of I-205. While I do agree that the long game is necessary, I also think we need to note the high crash corridors near I-205. The transit does not exist around I-205. In speaking for my constituency, I do support Concept B due to the transit options in that area, although I am supportive of Concept C as we move forward.
- In Concept B, there is dense transit. I want to make sure we are not only relying on the anticipated transit in 20 years in the RTP but considering what is required to implement congestion pricing.
- On the west side of the Willamette, the Southwest Corridor light rail planning will be a huge opportunity to give people alternatives.
- Point of clarification: the way the bullet is written looks like you are planning to bypass the operational analysis and go straight to the implementation pilot.
 - *That is due to poor language in the slide. All the steps in the roadmap – with changes depending on the level of complexity – will be followed.*
- It looks like Concept B may cause diversion from I-205 to the I-5 corridor because I-5 performs better. What is the scale of that and how can we address it?
 - *In terms of scale: a couple percentage points. This diversion caught me by surprise as well, until I considered the details. Relieving congestion on I-5 encourages people to divert from I-205 to I-5, especially since the I-205 corridor is a longer route for many trips.*



Recommendation topic: Consider implementation of Concept E concurrent with Concept B. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- From a system management concept, I like the idea of being able to manage both corridors. ODOT does that today with variable message signage, which provides information on which route will be the fastest. I like the idea of continuing this strategy.
- As I understand Concept E, it is meant to generate revenue and build infrastructure. One thing I highly value is talking about congestion pricing as a tool to manage congestion on the roads. I do not want to see our region getting into the habit of using tolling to widen freeways. I am not supportive of moving forward with Concept E.
- I am supportive. We cannot think our population is static, as well as our business community. If things are static, no added capacity is merited.
- When we discuss and analyze priced lanes, we are looking at a restriction for freight. My concern is that congestion pricing should not increase the throughput of I-5 and I-205 with a priced lane that excludes freight.

Recommendation topic: After assessing performance of initial pricing project (assuming successful evaluation), consider implementation of Concept C in phases with comprehensive system analysis. PAC member discussion included:

- I like the idea of considering Concept C, but I would prefer to look at a larger area than Concept C. What about diversion to OR 217? We should be having that conversation.
- I realize Concept C is beyond the limits of what we can do this year. There needs to be a larger analysis. I also appreciate the roadmap that David provided, which shows how long the road is going to be before we get to tolling. I am very supportive of a larger analysis. I would like the language to be modified to indicate that this would be a region-wide system analysis. This analysis would be after the recommendation to the FHWA but before tolling is implemented.
- Concept C has the greatest impacts to safety on local roads and to low-income communities. The goal is to reduce congestion. I support bringing back option 4 (from the round 1 evaluation – add new priced lanes the length of I-5 and I-205 between the state line and the I-5/I-205 interchange) for consideration, because it has the most promise for congestion relief.

Recommendation topic: Develop mitigation strategies for low-income and adjacent communities. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- I have been very pleased to hear conversations around the table on this topic. I would like to emphasize to the PAC that increased transit has to be part of the



package. This cannot just be a mitigation strategy; it has to be part of the package.

- I strongly agree with the support of enhanced transit as long as it includes carpools and vanpools.
- I would like to have on the record that we need to look at mitigation strategies for the entire region.
- Will we have time to add to and adjust these mitigation strategies?
 - *Yes. The purpose of today's meeting is to discuss ideas on mitigation strategies and discuss an initial recommendation, both of which we can bring back to the next PAC meeting for discussion.*
- Looking at where Concept B would start and stop (termini): I remain concerned about diversion on local roads, including SW Barbur Boulevard and NE Martin Luther King Boulevard. At this point, I have a hard time understanding how diversion is mitigated. There is a fair amount of transit. I support moving forward with this, but the devil is in the details.
- TriMet is in the midst of doing outreach for HB 2017. That legislation points towards a concentration of new services for low-income and minority communities where they live, which is not exactly in line with tolling mitigation. It is a different lens, even though we want to mitigate the impacts of tolling on low-income and minority communities. We are not looking at corridors that parallel these toll corridors. That would have to be another conversation.
- Since I am not going to be at the next meeting, I would like to know how you are going to solicit PAC opinions and recommendations for the next meeting. Should we provide something in writing?
 - *ODOT staff will be in touch with PAC members to decide what will be best for the PAC. That is how we structure these meetings - to allow for PAC discussion. We will continue to do that and that is our priority. We are here to help the PAC receive the necessary input to make a recommendation to the OTC.*

Recommendation topic: Other issues important to the PAC, including the need for future system-wide pricing analysis; need tolled freeway capacity (transit and roadways); and specified use of revenues. PAC member discussion included:

Project team clarification and responses are indented and italicized.

- All the transportation systems need to grow: bicycle, pedestrian, transit and vehicle. We need to look at our entire transit system and the economics in a growing economy with a growing population.
- We need to increase transit on our freeways and increase transit in the corridors. This does not fall under freeway capacity, but rather a different approach.
- Regarding the need for a system wide analysis, we need to identify that we are not just interested in money, but rather system wide operations. To make it clear to everyone, we need to express how we want to make the system better.
- When we do the analysis on value pricing, we need to look at the most impacted areas to identify specific projects and work with our partners to prioritize projects to mitigate diversion.



- I agree with the three issues that have been identified as “important to the PAC.” We have heard about a system-wide approach from Washington residents. Concept C is a more directed analysis.
- On the point about capacity, it is about system capacity.
 - *As a project team, we agree that capacity is about system capacity, not just freeway capacity.*
- The I-5 bridge needs to be part of the analysis.
- As part of the process, we need to make sure we continuously get public input.
- As one of three PAC members from north of the Columbia River, I want to say that 70,000 people commute from SW Washington on these freeways, and they pay Oregon income tax. I would like to add that we need some sort of mitigation for those commuters. Even if it is not total compensation, they need some ability to be compensated for that additional cost.
- When we look at future pricing and dig deeper into Concept B, are we also taking into account statewide growth and freight movement outside of this region? When the Joint Transportation Committee traveled the state before HB 2017 passed, they found that Portland area congestion was a concern statewide.
 - *We will look into the modeling results and if there is information about statewide freight movements under each concept, we will bring the information back to the next PAC meeting.*

TOPIC: NEXT STEPS

Penny concluded PAC 5 by outlining the next and final PAC meeting on June 25, when PAC members will be receiving draft recommendations based on discussion from this meeting. At PAC 6, recommendations to the OTC will then be finalized after PAC discussion. Commissioner O’Hollaren and Commissioner Simpson closed the meeting with final comments:

- Thank you to everyone. A lot of voices have been heard and there are a lot of options. We need to consider the impacts and do our best to be prepared for the unintended impacts. Transit and carpooling and creating options is important so that we aren’t discriminating geographically and focusing on Title IV and low-income.
- All of this does not come cheaply. All of it costs money and investment. It should be a user-based system, where those who use the facilities pay.
- The OTC will be looking bigger picture to understand where we want to go in the long-run.
- No option is easy, nor is it inexpensive. No matter what we do, we will not have enough money to pay our way out of congestion given our population growth.
- I appreciate the input, time, consideration and different points of views.
- Lastly, it has been great working with Brendon from the City and we look forward to working with him in his new capacity in the Governor’s office.
- Capacity and diversion will be ongoing conversations given our growth rate and current constraints. We never planned for this type of population to exist in our urban environment. The key is to come up with pragmatic solutions.



- This is the first mile to a marathon. We have a lot more work.
- I want to circle back to the comment about the Band-Aid. This is not solely a Band-Aid to transportation alone, but also housing, jobs, education, products and services. As easy as it is for us to advocate for our own goals, aspirations or constituents, we have to keep a broader lens on how this region impacts those factors to create an equitable and prosperous ecosystem that we share.

The meeting was adjourned at 12:00 pm.



Attachment: PAC 5 flip-chart notes – discussion of consultant recommendation

Consultant recommendation: Do not implement Concepts A or D:

- As you move forward with Concept E should also consider Concept D in the future
 - The PAC noted two different ideas: (a) consider tolling all lanes the length of Concept D instead of just on the Abernethy Bridge; (b) consider tolling just one lane the length of Concept D to offer choice
- If we are going to build a new bridge, need to add third lane
- Not comfortable with discarding the priced lane option (e.g. Concept D) – due to lower impacts to low income populations and diversion to local streets
- Concepts A and D address the supply side more than others, whereas Concept E adds capacity
- Agree with not implementing Concept A but need to consider Concept D in future
- Many thumbs up on agreeing with this recommendation

Consultant recommendation: Initial implementation of Concept B as pilot pricing program, coupled with performance monitoring to evaluate success:

- Needs model origin / destination of travelers for Concept B
- Consider broader planning (beyond I-5 and I-205)
- Consider diversion near Columbia/Lombard during future analysis
- Lack of clarity and uncertainty about investment in transit or where the revenue goes, need this certainty before this Concept goes forward
- Go further than mitigation for low-income, need to adopt a comprehensive no-harm approach and there need to be benefits
- This assumes the additional capacity at Rose Quarter
- Capacity issues with transit already
- For Concept B to move forward, need to consider some form of tolling on I-205
- Starting with Concept B then moving to Concepts E and C seems reverse/backwards, need to determine longer-term goal and then look at these pieces as stepping stones to achieve longer-term goal
- Agree long-term goal is important. I-205 is a high crash corridor, without additional transit there is a danger on local streets from diverting highway traffic. Supportive of Concept B but need to consider Concept C
- Need to consider diversion increases -- good and bad in this context
- Southwest Corridor Light Rail Transit planning was considered in conjunction with all concepts
- What is the scale of diversion back to I-5?
- Where would you start or stop on this option (termini)?
- Must consider diversion, i.e. onto MLK where there are few redundancies in the system. Must consider transit and transportation options

**Consultant recommendation: Consider implementation of Concept E concurrent with Concept B:**

- This provides for system management across both corridors and is an opportunity as well to complete a needed project
- Congestion pricing is a tool to manage demand and demand management should be the overarching principle. Therefore, not supportive of this approach, as it is a revenue-generating option, not demand management
- The population is not static, need to think about long term growth and the long-game, and the goal is reducing congestion
- Pay attention to whether traffic being diverted, and low-income impacts can be avoided
- Should keep a priced lane option on the table instead of just tolling all lanes in this area
- Priced lanes often exclude freight – cannot make freight impact worse with a priced lane option

Consultant recommendation: After assessing performance of initial pricing project (assuming successful evaluation), consider implementation of Concept C in phases with comprehensive system analysis:

- Need a more comprehensive look at the entire system, a need to look at the broader system in this recommendation
- Continue a larger regional-area study, post-December 2018 and before regional implementation of tolling
- Greatest impact on diversion and safety impacts on local roads and low income; need to pay attention to these impacts

Consultant recommendation: Develop mitigation strategies for low-income and adjacent communities

- Emphasize to OTC that increased transit service and access be a key recommendation (should be included as part of project scope)
- Strongly agree with increasing transit – as long as it includes vanpools and carpools
- Need to consider communities and benefits to transit north of the Columbia River
- Constitutional limitations must be addressed, especially for transit benefits
- HB 2017 resource for transit, and mitigations for low income is not being looked at in parallel with tolling. This needs to be separate work
- Details matter

Other topics:

- Agree with slide content
- Population is continuing to grow, need to consider the system, some people will always drive, need to consider the economics of growing population
- Increase transit on freeways, also increase overall transit on local streets
- System wide operations analysis is needed – how to make operations better at an entire system level; I-5 bridge replacement should be part of this analysis
- Should identify projects and prioritize funding for the entire system



- Look at areas most impacted, work regionally and systemically to manage impacts through funding, infrastructure, and transit
- Washington residents would want to know why Concept C, will need a system-wide analysis to answer
- Need more system capacity in many forms, not just freeways; need transit and all modes
- Public participation and transparency must be included
- Oregon income tax is paid by Washington residents and financial mitigations should be considered for those in Washington
- Taking into account growth outside of this regional area. Traffic from other parts of the state/region all have to travel through this area, this study needs to consider interstate travel



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ATTACHMENT E: SUMMARY OF PAC DISCUSSION AT PAC MEETING 6



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The draft meeting summary for the sixth PAC was transmitted to PAC members via email on July 27 with the request for comments or proposed edits by noon on July 29. Comments and proposed edits were received from a few PAC members and the meeting notes were revised as necessary.

FINAL Meeting Summary: Policy Advisory Committee Meeting 6

DATE: June 25, 2018

LOCATION: ODOT Region 1, 123 NW Flanders Street, Portland; Conference Room A/B

TIME: 9:00 am – 12:00 pm

MEETING OBJECTIVES

- Finalize PAC recommendation regarding concepts, mitigation measures, and other issues for inclusion in PAC recommendation to Oregon Transportation Commission
- Recognize conclusion of the PAC's charge

ATTENDANCE

Bernie Bottomly (TriMet), Craig Dirksen (Metro), Phil Ditzler (Federal Highway Administration), Marie Dodds (AAA Oregon Idaho), Matt Grumm (City of Portland), Chris Hagerbaumer (Oregon Environmental Council), Marion Haynes (Portland Business Alliance), Jana Jarvis (Oregon Trucking Associations), Gerik Kransky (The Street Trust), Anne McEnery-Ogle (City of Vancouver), Sean O'Hollaren (Oregon Transportation Commission), Eileen Quiring (Clark County), Roy Rogers (Washington County), Paul Savas (Clackamas County), Alando Simpson (Oregon Transportation Commission), Kris Strickler (Washington Department of Transportation), Pam Treece (Westside Economic Alliance), Jessica Vega Pederson (Multnomah County), Rian Windsheimer (Oregon Department of Transportation), Park Woodworth (Ride Connection)

AGENDA ITEMS AND SUMMARY

TOPIC: WELCOME AND AGENDA REVIEW

Penny Mabie (Facilitator, EnviroIssues) welcomed the Policy Advisory Committee (PAC) to the sixth and final Value Pricing Feasibility Analysis PAC meeting. Penny outlined the meeting materials, led introductions, and reviewed the meeting agenda and Value Pricing Feasibility Analysis timeline. She asked the PAC members if they had any changes to the meeting #5 summary.

PAC Action: Meeting #5 summary was approved without change.



TOPIC: COMMENTS FROM PAC CO-CHAIRS

- Thank you for your time and engagement. We look forward to listening and engaging with you all today.
- Please provide as much time as possible for public comment.

TOPIC: PUBLIC COMMENT

Penny welcomed public comment and asked that commenters limit their comment to two minutes. Public comments included:

- Portland has the worst congestion in the nation and 35 bottlenecks. You have not told us how ODOT will fix this. We have congestion because we have not increased capacity and our population growth has doubled. Tolling will cause diversion and accidents in the neighborhoods and I feel this entire process has been a sham.
- I have been a longtime (30 years) proponent of congestion pricing. I hope the goal is to maximize vehicle throughput of existing lanes not to maximize revenue; toll rates should be set to do that. Second, I suggest a different option: price all of I-205 from the river to Wilsonville because it is long enough to generate evidence that congestion pricing works and it would leave I-5 unpriced.
- Thank you for your time on this project – it is great work. Another idea: rather than recommending Concept B as an implementation path, look at a variety of ways by starting with an initial subset of entrance ramps. That idea could be expanded and then converted to a mileage-based system. This would be efficient and publicly acceptable. I agree with tolling for operation rather than revenue.
- There is no option to price the entirety of I-205. I live in the I-205 corridor, and think this pilot project would benefit the rampant congestion in the area. You would also give tolling authority to end the program if it does not provide results. When people see how well tolling I-205 works, they will be more willing to see it implemented elsewhere in Portland.
- I want to draw your attention to an aspect of congestion pricing: how value priced roads would benefit the poor. People say it is unfair to make people pay for roads that were once free. However, there are several aspects of the current system that are unfair: the cost of congestion makes a larger dent in a smaller paycheck. Congestion pricing would result in faster commute times for the poor who take transit, and save time and money and reduce auto emissions for those living close to the freeway.
- I am generally opposed to tolling because the alternatives do not pay their way and motorists subsidize them. The revenue should go to capacity. We need to make the bicyclists pay, and if that includes tolling bicycle lanes, let us do that. We cannot build our way out of this growth. Maybe we ought to look at what Trump is doing and build a wall around Portland or at least divert I-5 around Oregon.



- Increased capacity could meet our freight needs. Freight is expected to increase by 75 percent by 2030. Population growth is real, too. We do not need a dilemma between capacity and transit. The Western Arterial Route is well studied, would have advantages for freight, commuters and transit and is affordable and provides choices.
- We have serious concerns about diversion into the Overlook neighborhood associated with Concept B. North Portland has higher rates of young, diverse (race and ethnicity), lower income and car-dependent households. Without mitigation, Concept B would place costs on households in the neighborhood and cause safety issues. We are not opposed to tolling, but we are opposed to creating a situation that will cause people to divert into Overlook and North Portland.
- Thank you for your work; West Linn recently had multiple presentations from ODOT. West Linn is going to be greatly impacted. At the ODOT Open House, I got different answers to my question about when and how widening will be paid for. This is a dilemma. I am not anti-tolling, but the PAC needs to put a lot of thought into this and please consider West Linn in the process.
- I am in favor of congestion pricing, although I have concerns about diversion, as a bicyclist. I would like the revenue to go to bus connections, neighborhoods and alternative mode commute routes, which would help alleviate diversion and reduce congestion. In Washington County, renters who are car free must pay for a parking spot and road widenings, which do not benefit them and preserve our climate for future generations.
- I cross the bridge and get on the MAX to get to work in Hillsboro from Vancouver. If you toll the bridge, I would have to pay a toll to ride the MAX. A long-term solution is to build another bridge. I do not think big Portland clients – Nike, Intel, banks, trucking – want a toll on federal bridges. Billions of dollars come across that bridge, and tolling will take money away.

TOPIC: DRAFT PAC RECOMMENDATION TO THE OTC (DISCUSSION/DIRECTION)

Penny outlined the next agenda item. Penny said that this portion of the meeting will begin with a presentation from Kirsten Pennington (WSP) to introduce the Draft PAC Recommendation to the Oregon Transportation Commission (OTC) discussion. After that, Penny said she will lead the PAC in a discussion on the Draft PAC Recommendation to the OTC.

Part 1 – TOPIC: DRAFT PAC RECOMMENDATION TO THE OTC (DISCUSSION/DIRECTION)

Penny introduced Kirsten Pennington to outline the Draft PAC Recommendation to the OTC by section. The Draft PAC Recommendation to the OTC does not yet reflect the PAC's meeting 6 (June 25, 2018) discussion and will be revised to incorporate that discussion. The Draft Recommendation to the OTC represents what the project team has heard from the PAC thus far, especially during PAC meeting #4, when the PAC discussed mitigation strategies, as well as PAC meeting #5, when the PAC began forming a recommendation for OTC consideration.

**Section 1:** Context of the recommendation to the OTC. Key components include:

- The legislation requires the OTC to submit the proposal to the Federal Highway Administration (FHWA) by the end of 2018. The role of the PAC is advisory to the OTC.
- The OTC does not require PAC consensus. Minority opinions are welcomed and will be captured and given to the OTC.
- Further planning, analysis, mitigation development and public engagement will be conducted. There is a lot to come in terms of specificity in the mitigation discussion.
- This recommendation is the first milestone in a longer-term process.

Section 2: Mitigation priorities. This was part of the PAC charter. Key priorities heard from PAC members and the public include:

- Improved public transportation and other transportation options are essential strategies for equity and mobility. Overall, congestion pricing is intended to improve mobility and provide benefits.
- There is more work needed to identify specific strategies to mitigate impacts. Special provisions need to be considered for Environmental Justice (EJ) populations, including low-income communities.
- Diversion strategies should be designed to minimize and mitigate negative impacts where necessary.

Section 3: Recommended pricing concepts. This was part of the PAC charter. Key components include:

- The consultant team provided a recommendation to the PAC at PAC meeting #5, which included 3 components for pricing concepts that warrant further traffic revenue, public involvement and environmental analysis: initial implementation of Concept B (pricing all lanes on I-5 between Going to the Sun and Multnomah) and Concept E (pricing all lanes on I-205 on the Abernethy Bridge, including the planned future additional lane in each direction); longer-term implementation of Concept C (pricing all lanes on I-5 and I-205 from the state line to their interchange near Tualatin) as part of a larger pricing analysis; and ensuring that the initial implementation is in conjunction with mitigation strategies.
- The PAC members provided some comments at PAC 5 on the consultant recommendation, including: pricing is a way to add capacity; pricing is a way to avoid adding capacity; support Concept C as a vision and identify Concept B and/or E as first step; support for Concept C as an initial project; and modify E to ensure it addresses the planned third lane on I-205 (Stafford Road to OR99E) in addition to the Abernethy Bridge replacement.
- The team revised the consultant recommendation that was presented at PAC 5 based on the committee's discussion at that meeting. The nature of the recommendation is what will warrant further traffic revenue, and environmental analysis. The revised recommendation was the same as the consultant recommendation provided at PAC 5 (see above) with the change clarifying that Concept E was intended to address the planned third lane on I-205 (Stafford Road to OR99E) in addition to the Abernethy Bridge replacement.



Section 4: PAC input on other topics. This was not a required part of the PAC's charter, but this section reflects issues for consideration by the TOC that the project team has heard from the PAC. Key components include:

- Pricing analysis and planning are needed for the regional freeway system: I-5, I-205, I-84, I-405, US 26 and Hwy 217.
- As the region grows, we need to plan for adding roadway and public transportation capacity in a pricing environment.
- Revenue should be used to relieve traffic congestion within the region.

Section 5: PAC member written comment. This section will include individual, unedited written comment from PAC members, which are due to Penny on June 29, 2018. The project team recognizes there is a diversity of opinions around the table and this is meant to ensure all PAC member voices are heard.

PAC member comments and questions regarding the overview of the Draft PAC Recommendation to the OTC included:

**Responses are indented and italicized.*

- The recommendation for longer term study of pricing mentions looking at all Portland area highways – I assume that includes I-5, I-205, I-84, I-405, US 26 and Hwy 217. But this is not written down or on the map. Did you mean to put all Portland area highways in the recommendation?
 - *We have heard those highways mentioned by the PAC in terms of future study. We can reflect this level of specificity in the report if that is what the PAC wants to recommend.*
- This might be a question for the PAC co-chairs. In the process, we are talking about a first milestone and then a longer-term process. I know the OTC did not put this forward (it was the Legislature). We have also been having dialogue with some of our legislators. Some are against tolling; some are open to it. What, if anything, has the OTC talked about? What, if anything, do you think will happen with OTC after this process?
 - *This PAC meeting is structured to make the most of the time we have today. We are trying to capture the larger themes, while still listening to minority opinions. We will be presenting this discussion to the OTC on July 12, 2018. Then, we will go back to them and ask for input. Many of the questions that have been raised by the PAC can be addressed once we know what concept we are moving forward with. That is why we are asking you specific questions. If the conversation goes another way, that is okay.*
 - *We [the OTC] are not looking for a consensus. The commission will have a deeper discussion, which may or may not embrace everything that comes out of this. We want to be sensitive and consider minority points of view. We are looking for the broader perspective.*
- I am not saying we have a minority opinion. I am just hoping to clarify - What does "longer-term process" mean?



- *This process is meant to get points of view for major stakeholders and to allow the public to provide input and submit arguments that allow us to get smarter on what congestion pricing in Portland could look like, if it can work and how we can mitigate the unintended consequences. Hopefully we will come away with a process that embraces many points of view. Ultimately, it is to inform the OTC so we can decide with the greatest amount of information possible.*
- I appreciate the clarification. There is confusion – reading some of the letters and comments – about how this process influences funding infrastructure improvements. Our legislators met twice in Salem and voiced individually and collectively that they are relying upon tolling to pay for improvements. My question is: going forward today, how will these projects be funded? If we are supposed to give our points of view, we need to know how it is going to be funded.
 - *The OTC has not made that decision yet. The legislature made it clear that there will be a fund for congestion pricing revenue, but there is no indication of how that money will be spent. We have a massive volume of infrastructure needs and a shortfall in revenue. I cannot imagine we would come to a point where the revenue should not be used for investing in the system. This body is free to recommend whatever it wants, and the OTC will consider it.*
 - *We are in the process of making the PAC recommendation, which will be important for the OTC moving forward. It looks like there are some questions on the white board that show we will have a chance to provide input on this.*

Part 2 – TOPIC: DRAFT PAC RECOMMENDATION TO THE OTC (DISCUSSION/DIRECTION)

Penny transitioned the PAC to the discussion on the Draft PAC Recommendation to the OTC. The project team developed six questions pertaining to sections 2, 3 and 4 of the Draft Recommendation to the OTC (see appendices for PAC 6 Deliberation Questions). For each question, the PAC will weigh in on whether it is the right question, provide comments on the topic/question and ask clarifying questions. Once the question has been established, the PAC members will be asked to vote on the question, signaling if they “support,” “accept,” or “oppose” what is in the Draft PAC Recommendation to the OTC (see appendices for PAC 6 Deliberation Questions - Results). “Accepting” means, “I can go along with it, I will not fight against it, but I am not saying I support it.” The vote will be done by a show of hands and the report will reflect the outcome. Individual PAC member’s votes will not be identified in the notes. If PAC members want to comment specifically on one of the questions or express their position, they can do that in their individual comment letters. PAC member comments and questions included:

- All of that extra white space under each question on the flip charts – do we write our “but” statements?
 - *The project team will capture the PAC discussion on the flip charts.*



- *Not every comment will be included in the recommendation. If ideas need to be put into the recommendation, I will ask "shall we include those?" So, the PAC is building the recommendation as we go, recognizing that we have captured many sentiments in the summaries and they will be attached to the report.*
- Under section 2.1, the report states that travel times and travel speeds will be primary metrics. The lack of identifying public transportation as a metric strikes me as an oversight that should be addressed. Public transportation should be a metric of success.
 - *The team will note this concern to ensure that appropriate metrics are used in future phases of study. [Staff Note: the availability of public transportation was analyzed along the I-5 and I-205 corridors as part of this study.]*

Penny transitioned the group from clarifying comments and questions to discussion about the questions. PAC member comments and questions are summarized below. Project staff responses are indented and italicized and direction from Penny is italicized.

Mitigation priorities

Refer to Section 2.2 starting on page 2-3 of the DRAFT recommendation report.

Mitigation Priorities Question (PAC question 1 of 6): Do PAC members support a recommendation to the OTC that identifies these priorities for mitigation strategies that should be more fully developed as part of congestion pricing?

- What does "public transportation options" mean? Normally we are talking about various modes under "options."
 - *We have often used the word "transit." It was requested we be more inclusive of carpooling, so we wanted to use a broader term. It is not all inclusive or exclusive at this point.*
- In the section about improving public transportation, it says "carpool/Ride Share." Uber and Lyft have taken over the Ride Share term. Replace "ride share" with "Vanpool."

Penny asked the PAC about this change, and heard no opposition to including the change in the report.

- Metro Council feels we need to take one step forward so that transit access is not just a mitigation strategy, but a part of the package. To truly understand how a program will work, we need to increase transit access from the very beginning. Transit should not be a mitigation strategy, but it should be part of the program itself. If ODOT studies congestion pricing without increased transit, ODOT's analysis will demonstrate what we already know: it is hard to price people when you do not provide them with other options.

Penny asked the PAC to respond to the above comment.



- From a Clackamas County perspective, along the 14-mile stretch from Sunnyside to Wilsonville, it is imperative that transit be in place before tolling.
- I think the Environmental Justice communities feel hesitation towards a process when it is not broadened as early as possible. What we are looking for is to bake it in as early as possible, that whatever we develop, it is early in the process.
- The City of Portland strongly supports that. We should model above and beyond what is in the 2027 RTP because we are adding transit to our system.
- I want to add my support to that comment. If we are talking about choices and giving people options, we need to have transit baked into the plan.
- I strongly support Councilor Dirksen's comment about integrating transit as a foundational element of the program.

Penny asked if the PAC would like to take transit out of the mitigation strategies and make it a condition of the concept recommendation.

- I do not know that we want to take it out, but add a section that takes transit improvements beyond a mitigation strategy as part of the program. The language needs to reflect that.
- I think there are sections of the interstates right now where there is adequate transit to do a pilot. I want to make sure the sections where there are no alternatives, that it not be implemented until then.
- I am not sure that the other two are not the same – transit as a mitigation strategy and transit as part of the recommendation package. I think the idea is that as you move forward with a strategy, we need to make sure we address all three of the mitigation strategies before the program gets implemented, so that the program incorporates a variety of mitigation strategies, including transit. All of the mitigation strategies need to be a part of the program development.
- I agree, but we need to state it stronger in the report than how it is laid out currently – that these are essentials.

PAC agreement was reached to retain public transportation in the mitigation priorities section and make a stronger statement to implement public transportation strategies in the PAC Recommendation to the OTC.

- "Bad" diversion is a negative we want to address, but there are times you would like to divert local trips from freeways to local streets by giving them a better option. Some diversion is not bad and we would encourage some diversion. The term in the recommendation refers to "parallel" arterials – "impacted" is better. Because we anticipate impacts, safety improvements need to be considered as part of the program, so that arterials are prepared to accept the diversion. I suggest adding "safety improvements to arterials."

Penny asked for PAC members to respond to the above comment.

- "Arterials" is way too broad. The Rose Quarter is a priority for us. From a Washington County perspective, I certainly do not have problems with mitigation on some arterials.

Penny asked - Is there a way to add this comment but not have it that broad?

- Recognizing safety to arterials that will be impacted by diversion needs to be given a priority consideration for local trips.
- Can parallel be included as well? It is imperative to the I-205 section.
 - Yes.



Penny asked the PAC if they had further comments about the mitigation priorities.

- Under the second mitigation strategy we appreciate the statement “regardless of state of residence.” Would the PAC consider using the phrase “entire regional bi-state system?” This phrase would work with all of these, reminding folks that C-Tran is the only provider of interstate transit. I would put it in the paragraph before “Draft Mitigation Strategies” paragraph.

Penny asked the PAC about this comment, and the PAC had no objections.

- With some of these, we may have some regulatory barriers that need to be remedied. I do not know where that goes, but it needs to be pointed out that moving across the state/Metro, there may be legislation barriers that need to be clarified, and that needs to be in the PAC recommendation to the OTC.

MODIFIED Mitigation Priorities Question (PAC question 1 of 6): With the discussed changes, do PAC members support a recommendation to the OTC that identifies these priorities for mitigation strategies that should be more fully developed as part of congestion pricing?

PAC Action:*

- Support: 15
- Accept: 3
- Oppose: 0

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

Recommended pricing concepts

Refer to Section 2.3 starting on page 2-5 of the DRAFT recommendation report.

Pricing Concept Question 1 (PAC question 2 of 6): Do PAC members support a recommendation to the OTC that advances pricing projects on both I-5 and I-205?

- At the Westside Economic Alliance transportation meeting I asked this question: do Concepts B and E provide enough information to test the system efficiently? Another thing our committee felt strongly about is that capacity is the number one issue.
 - *We will call David Ungemah (WSP) up to answer these types of questions.*
 - *Yes, for a variety of reasons. The first is oriented towards congestion pricing as a traffic mitigation strategy. There is a substantial number of trips occurring through the concept areas. It is typical that a congestion pricing pilot project is in place for 2-3 years. Within that amount of time, you get a pattern that is quite sustainable. On Concept E, there is a revenue component for construction purposes. We not only have the benefits of understanding congestion reduction, but also diversion impacts near West Linn, as well as the contribution of payment for the Abernethy Bridge and the added third lane. Between the two concepts, this would resolve the broad question from the Legislature in HB 2017*



about how congestion pricing could be used as a traffic reduction measure and strategy to raise revenue.

- Are you saying the efficiencies from B and E can be extrapolated?
 - *Yes, there would be enough statistical evidence that would tell us how congestion pricing would affect the broader system. Local context matters.*
 - Would there be any preference to doing the Abernethy Bridge prior to tolling through the Moda Center corridor? Or is the recommendation to do both at the same time?
 - *Both projects have an independent value. Part of the reason our team feels strongly about these two concepts as part of the initial PAC recommendation to the OTC is that they have an immediate, independent result. As to the timing, Concept B requires a greater level of engagement with the FHWA and United States Department of Transportation (USDOT), which can take time. Concept E may take time or may be more smoothly and quickly implemented. The approval process may be shorter, but construction may take more time, so we may see these implemented simultaneously. They do have independent reasons for implementation.*
 - Because of the severe concerns of diversion as a result of congestion through the West Linn area, I cannot support the question the way it is worded now. We should not be tolling anything until there are alternative routes or modal options in place. I support the pilot projects but it must be done where there is already transit options. For Concept E, there is no alternative parallel route along I-205.
 - I just want to clarify the process. My understanding is that we are advancing these two ideas – Concept B and Modified Concept E – for additional analysis and consideration by the OTC to answer a broad range of questions related to diversion and tolling locations. Is my understanding correct?
 - *That is correct. If it is helpful for the PAC, we can have David overview the roadmap.*
 - Add the words “for further study” and I can buy into that.
- Penny clarified that the recommendation would reflect that the discussion about the pricing concepts is about which concepts move forward for further analysis.*
- Given that this recommendation is for further study and in responding to the public comment about North Portland, I recall that we had discussion about whether or not this is the right location to start/end tolling. Maybe we need to add blue hashtags to the map for the end and starting points of Concept B.
 - *That is what we also heard – in terms of the termini. That was the intent, and the team can reflect that in the graphic.*
 - The OTA did an independent study on freight bottle necks nationally; that section of the Rose Quarter was number 16 of 100. Our concern is that you would divert enough traffic. Our sense is that you need to do both freeways to manage the traffic flow. We would be supportive of doing them both together.



- The City of Portland strongly supports congestion pricing on I-5 and I-205. We would like to see it taken further in the near term. Building on a previous comment and the public comment on North Portland, my understanding is that there was a technical memo that said the beginning and end would be reexamined, and we would like to put that back in.
- AAA supports the notion of tolling and realizes it is a tool for transportation funding. We also believe that when tolling is utilized reasonable toll free routes should be available. That is important to our discussion about diversion and we would like to look at what options would be available without creating bottlenecks on surface streets.
- Whatever we do for the north end of Concept B in terms of termini, we should also do for the southern end.
- With the only option on Concept B there are no additional lanes on I-5. You will be tolling all of those lanes. People will have to get off of the freeway to access a non-tolled lane. This does not provide the option that AAA is saying they would like to have, because there are no general purpose lanes.

Penny and Emma Sagor (EnviroIssues) clarified that changes to question 2 include: 1) add "for further study" at the end of the sentence and 2) in the PAC recommendation to the OTC, clarify that the termini of both concepts would be further analyzed and the graphics would be revised to show that, for both the north and the south corridors.

- When you are looking at both recommendations – is this an either/or situation? Or can you vote for both? Second, I thought we were looking at B/E and then a complete system option, but it does not look that way in the language. The second question appears to be more phased in than going with Concept C at first.
 - *This phased approach is captured into the principal of both freeways. The next question is, this phased approach that the consultant is recommending – I have heard multiple views. So this is a chance to express those.*
- So this question is Concept B and Modified E supported?
 - *It addresses the principal of doing this on both freeways.*
 - *We tried to organize the discussion so that we are addressing the principle of tolling both freeways and so that the question did not become circular. However, if it is the will of the group, we can change the question.*

Penny asked the PAC – Is it the will of the group to change the question to ask specifically about Concept B and Concept E?

- I appreciate the way the questions are currently written.
- The second question is broad enough that the City can support the question as worded. The second piece, we will accept but not support.
- When I took this question back to the Westside Economic Alliance, the vote was evenly split, so I asked if we could vote for both. That is why I am asking about the wording.
- It sounds that there should be three conversations/questions: do we support B and E? Do we support C? And a larger principle question of supporting tolling on both I-5 and I-205.



Penny clarified – the question should be: In principal, the committee recommends an approach that puts tolling on both freeways. And then you get to the more specific questions: do you support E/B and C?

- I propose doing that later.

Penny asked - Is the PAC okay with that approach?

- I would like to see emphasis on Concept C – that that is our goal. These (Concept B and Concept E) are interim steps. Long-term, our ultimate strategy is to implement Concept C, knowing we agree that these first two pilots are a necessary step on the way to that goal.
- I agree, although I suggest that that strategy is not comprehensive. It is not looking at all freeways in the system. We want to see a system that manages demand to increase capacity in a way that is cost effective for the driver.
- I was prepared to answer the questions as written. I can support question 1, as written, but not inferring Concept C is automatic.
- Representing one of the major payers of this concept (freight), we would like to see some success and capacity improvements and deliverables before we accept Concept C. I can support Concepts B and E and can potentially accept Concept C, but it needs to be clear that we will get some benefits and investments in capacity before we start talking about pricing everything.
- There has been a lot of good discussion, although I feel we have lost the clarity. It is important to vote now while we are having the discussion, because this is the heart of the recommendation. I do not think we should put this question off onto a different section.
- Washington County does not agree with a system wide approach until we see some results. I have empathy for our friends in Clark County; they have no alternative routes in Concept C. I like the phase-in, and I would like to see how congestion pricing works before we start taxing our neighbors to the North. I would like to do C, but we need to be sensitive to them.
- Metro supports a pilot and assessing the results before we go to a general tolling concept.
- I agree. Let us start with B and E before we put C into implementation.
- We ought to answer the questions: Do we support advancing Concept B and Concept E as a pilot? Do we think Concept C ought to be done long term?

Penny asked the PAC – is everyone okay with that? Do you support Concept B and Concept E, as the first question? Do you support Concept C, as the second question?

- The way you are writing them seems to be forcing B and E on both questions.
 - *That is not what I am intending.*



MODIFIED Pricing Concept Question 1 (PAC question 2 of 6): Do PAC members support a recommendation to the OTC that advances pricing projects (concepts B and modified E) on both I-5 and I-205 as a pilot for further study?

PAC Action:*

- Support: 10
- Accept: 6
- Oppose: 2

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

Pricing Concept Question 2 (PAC question 3 of 6): Do PAC members support a recommendation to the OTC that advances the two-tier approach (shown in Figure 2-2), which starts with two smaller pilot projects and includes a larger scale phased implementation on I-5 and I-205?

- My intention sitting at this table is to vote in support of Concept C. My concern with using a phased-in approach is that it appears to have a financial benefit. I am concerned that E and B inherently have a project finance element driving their implementation. I would like to see value pricing set to manage demand, with a transparent policy.
- The Oregon Trucking Association's support is based on capacity improvements. We are not in favor of congestion pricing to support other projects.
- I think a lot of folks do not see congestion pricing as increasing capacity. Right now, we build roads for peak-period conditions. Congestion pricing reduces the number of people on the roads and increases throughput. I agree we need to do this in phases, but we have heard from consultants around the world: the public says "no way!" and the feeling flips when they see the benefits. It is the cheapest way to add capacity. You price first, and then you add the new capacity only if it is needed, based on an analytical analysis.

Penny asked – what do we need to do to ask question 2 correctly?

- When I went back to my community, I went with an either/or question: B and E, or C (assuming you support congestion pricing)? What I ended up with was a total split.
- My hope is that there would be a way to test support for Concept C. It seems that we have pushed the second question into the first. If we can find a way to test the appetite for C, that would satisfy my needs.
 - *These questions are here to help the conversation, not to add extra confusion. Forget the question if it is not helpful. There is no pride of authorship on those questions.*
- The question is about do you support the recommendation for a long-term congestion pricing program. The question is asking, "do you support what is in the recommendation?" If the pilot is a success, do you support Concept C.
- To get to the points everyone wants to make, there are three questions: The one we just voted on - Do we want to support the pilots? Do we support advancing



for the broader concept C and using the pilots with that larger project in mind? And do we support Concept C alone, first?

- The three questions should be: Do we support the pilots for a tiered approach? Or do you start with Concept C? The question should be: Do you want to start with C? The next question would be: Do you want to start with the pilots with the hope of moving forward?
- Part of the recommendation should be Concept C. The pilot projects are a way of testing. It is about the order in which they appear.
- The second question gets at that, and the third gets at C alone.
- Concept C includes I-5 and I-205, but page 2-6 talks about all Portland area highways. Can you please clarify?
 - *In the consultant recommendation, Concept C is a longer-term vision analyzed in the context of looking at other region freeways. It is C+.*
- The definition of "comprehensive planning," please?
 - *That is yet to be determined and is something the PAC can provide recommendation on today or in letters to the OTC. We do know there are steps in the roadmap, but the extent of comprehensive planning has not been entirely decided upon. That will be part of the future work.*
- That ambiguity helps me make my decision. Thank you.
- Concept C does not take into consideration much of the discussion that has been occurring. Just C is tolling all lanes.

Penny clarified – We have already asked the first question about the pilots. What I have heard is that the next question is, "Is there support for doing the pilots with the broader vision of Concept C in mind?" Then, "Do we start with Concept C? And last, "do you want to use the pilots to get to this broader, system wide, C+ version?"

- *I think the next question is: "Do you support Concept C as a first step?" Or, "Do you support C as a future vision?" And those are the two questions.*
- My struggle is – trying to represent those who have brought comments to us in the last week about why a two-tiered approach – if you are invested in a strategy that tests the pilot and then look at the results and determine next steps. That would raise the question about a broader system approach. Some of the struggles I have heard from the comments include 1) Why just I-5 and I-205? And 2) Without an understanding of what projects would be constructed, it is difficult to weigh in and 3) without a definition of success, how do you adapt to a next tier. Without those questions answered, a single vote for B/E to C, is tough for those on the Washington side.

Penny asked – What if we ask, "Do you support Concept B and Modified E, working towards a study of the larger area?"

- There could be more acceptance if there is additional evaluation. I struggle with isolating it to I-5 and I-205.

Penny clarified – These two questions get to the either/or dilemma. Essentially, we keep question 2 (concepts B and modified E followed by C), and the third question is more along the lines of section 2-6: start with the pilots and aim to implement congestion pricing in the greater Portland area. Remember, the language in the questions is not



precisely what the language will be in the PAC recommendation to the OTC. We will use these questions to modify the text in the Draft PAC Recommendation to create the PAC's recommendation to the OTC.

- Where does C+ come in?
 - Question 3 is C+.
- Question 1: Do you support concepts B and E? Question 2: Do you support concepts B and E that lead to Concept C? And do you support just Concept C?
- The issue is that the pilot projects should lead to looking at the greater Portland area, not constrained to Concept C.
- A concept that looks more broadly at a study of a regional system that includes other metro-area highways) is handled under the "PAC input on other topics."

MODIFIED Pricing Concept Question 2 (PAC question 3 of 6 – modified into two parts):

Do PAC members support a recommendation to the OTC that advances the **two-tier approach**, which starts with two smaller pilot projects (concepts B and modified E) and includes a larger scale phased implementation on I-5 and I-205 (concept C plus looking at the broader system)?

PAC Action:*

- Support: 9
- Accept: 4
- Oppose: 5

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

NEW Pricing Concept Question 2 (PAC question 3 of 6 – modified into two parts): Do PAC members support a recommendation to the OTC to consider implementing Concept C first?

PAC Action:*

- Support: 8
- Accept: 1
- Oppose: 8

**Votes add to 17. Curtis Robinhold did not provide a vote via email as question was added at meeting.*

Additional PAC member comments include:

- Thank you for that process, it helps me communicate to my community. Thank you for working us through that process.



PAC input on other topics

Refer to Section 2.4 starting on page 2-8 of the DRAFT recommendation report.

Other Topic Question (PAC question 4 of 6): Do PAC members support the suggestion that the OTC consider system-wide feasibility analysis of potential pricing applications on the regional freeway system? These are aspects the PAC would like the OTC to consider, not what the PAC recommends.

PAC member comments and questions are summarized below. Responses are indented and italicized and direction from Penny (Facilitator) is italicized.

- The City of Portland supports this. However, I would hope that the system is not purely an ODOT system, but also looks at transit and is a multimodal system.

Penny clarified – right now it says freeways and bottlenecks in the freeway system.

- *We tried to make this something the PAC could work on as a group today. This question can stand by itself, it does not have to have the revenue component. There is a place to make your recommendation about revenue, depending about how much time is left today. The topic of revenue can and will take many meetings.*
- We have concerns about the way the recommendation is written. I suggest a language change so that local roads are considered. We have heard a lot of conversation about comprehensive value pricing. My council is very interested in this, but we have concerns. That language change allows you to consider an entire system, not just those owned by the State of Oregon. I am concerned that the regional analysis would be done by the Oregon Department of Transportation. We need to first understand what our policy goals are and then consider them through regional study. The point is that I would like a language change so that the regional analysis needs to be done. JPACT and TPAC need to be a part of this.

Penny clarified – let us focus on freeway vs. a broader focus, but not focus on who does it.

- The last three words say, “regional freeway system.” I am okay with the question. I want clarification that the word “consider” is synonymous with the word “study”?
- Yes.
- When we talk about the regional freeway system, we are talking about those under the authority of the OTC. I do think the region needs to have a conversation about broader congestion pricing. When this goes to the OTC, we need to be clear. We are getting beyond our scope if we want to talk about getting into the future.

Penny responded – These questions are beyond the scope of this project. I do not want to get too far into the details. Let us make sure this question is correct.



- The question will be dealing with analysis, not determinations – it is just analyzing the whole system.
 - *Correct. The reason the language says, “OTC analyze...” is because this report is going to the OTC.*

Penny asked the PAC if they have any objections to the way the question is currently worded.

- We do need to be analyzing more than the freeways. If I say, “Yes,” does that put me in a box down the road? Each person’s answer to these questions have such different reasons for their answers. So, I hope that is all reflected.
 - *We have heard several times throughout the PAC process that the tolling discussion should not be confined to I-5 and I-205. I do not want to take too much time getting into something we have not yet discussed – tolling other than on the freeway system.*
 - *These questions are written because the PAC Recommendation is going to the OTC. It could be written as, “OTC should consider analysis in collaboration with regional partners.” That change could address what we are hearing around the table.*

Penny asked the PAC if they wanted the writing to be kept as “regional freeway system.” The majority agreed and those who did not agree could put that in their individual letters and abstain from voting.

- I would like to see language that says this is separate from the pilot projects.

MODIFIED Other Topic Question (PAC question 4 of 6): Do PAC members support the suggestion that the OTC consider further system-wide feasibility analysis with regional partners of potential pricing applications on the regional freeway system?

PAC Action:*

- Support: 10
- Accept: 6
- Oppose: 2

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

Penny transitioned the PAC to the fifth question. Due to time constraints, PAC members can include comments in their letters, rather than rewording the questions during the meeting. PAC members are welcome to abstain from answering because of how the questions are written.



UNMODIFIED Other Topic Question (PAC question 5 of 6): Do PAC members support the suggestion that the OTC develops a plan for future roadway and public transportation capacity increases in a congestion pricing environment?

PAC Action:*

- Support: 7
- Accept: 8
- Oppose: 1
- Abstain: 2

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

Other Topic Question (PAC question 6 of 6): Do PAC members support the suggestion that the OTC uses revenues from freeway tolling to provide benefits within the region where revenues are collected, for congestion relief and mitigation strategies? PAC member comments and questions included:

- Is the region considered Region 1 ACT (Area Commission on Transportation) or the Portland metro region?
 - *I would think it would be Region 1 ACT, given that this is an ODOT project. We are trying to capture what we have heard. I do not think it is necessarily about precise boundaries, but more about the value of keeping money within the area and not way outside.*
- We would only support this project if the revenue is limited to projects of regional significance. Is that implied?
 - *That is not a formal implication in the PAC Recommendation to the OTC.*
- Our support is based on region, not Region 1 ACT. The reasoning is to support revenue going to people who pay the tolls.
- I agree. The improvements should be tied to the corridor and would benefit the people who paid that toll.
- We want to make sure it applies to the constitution and is not a way to circumvent our highway trust fund.
- There is support for keeping money in the region. I would hope we all agree it stays here, however that ends up getting defined.
- No, because the region might grow. We feel we need to keep the money in the specific corridor.
- We need to say there is consensus that it should be used in our region with differences in the degree.
- We all agree these funds should not be spent outside the region. The specificity varies.
- I think there is something in statute that relates to this and maybe ODOT staff can look.
- I want to reiterate the corridor is important to the City of Portland.



UNMODIFIED Other Topic Question (PAC question 6 of 6): Do PAC members support the suggestion that the OTC uses revenues from freeway tolling to provide benefits within the region where revenues are collected, for congestion relief and mitigation strategies?

PAC Action:*

- Support: 11
- Accept: 5
- Oppose: 2

**The count includes the vote of Curtis Robinhold (Port of Portland), who could not attend but sent his responses.*

TOPIC: PAC RECOGNITION AND CLOSING REMARKS

Penny asked the PAC co-Chairs if they received everything they needed from the PAC group. Closing remarks from the PAC co-Chairs included:

- We have more than enough. Thank you to everyone for their investment and time. It has been a long time commitment.
- July 12th will be coming very soon. Please be present. Given time constraints, if there are things you felt you need to get off your chest, there is another step in this process. And there are three additional commissioners and your voice and your constituents' voices will be important.
- As we are going to keep moving forward, I highly encourage everyone to stay engaged, be involved and keep your voices heard. This is probably the most complex thing we have encountered in the past decade. I am confident we will find something that benefits Oregonians and Washingtonians.
- Thank you for your time and effort. We have learned a ton and have a deeper understanding.
- We need to address the issues raised: mitigating diversion; congestion causing diversion; environmental impact to low-income communities; building capacity; freight corridors and moving goods; population explosion combined with frozen transportation infrastructure.
- Through the Governor's panel, everyone around the state said Portland congestion mattered. We must look at it comprehensively. Perhaps create a Portland ellipse: where does congestion exist and where can it be addressed? We also have to look at public private partnerships, transit, bicycling, bus routes and maybe even ferries.
- Our friends in Clark County do not need to be singled out. There is one river dividing us. People in Vancouver, Washington want to spend time in traffic no less than those in Portland.
- Creating capacity and addressing this issue is not free. It costs money. We must be part of the solution. The historic methods of funding do not work.
- Collectively, we have heard a ton. We will walk into the Commission with a broad view. Each one of you took the time and effort to be here. I know the recommendations will not solve all problems and address all concerns, but we



will do our best to incorporate as many comments as we can, but also taking a big step forward to address regional issues.

Additional PAC member comments included:

- Thank you to the OTC commissioners. As we move forward, I encourage us to consider the collaborative nature of housing and transportation.
- Thank you to the OTC commissioners. I am not done reading the accident reports on the "third lanes" of I-205 but want to read one that captures the significance for Clackamas County. A constituent had a roll-over accident on Stafford Road and told the deputy: she was driving to the airport and took a shortcut to use SW Stafford Road to access I-205, due to a high volume of traffic. This was at rush hour, simply cutting through the area, where most accidents are rollovers.

TOPIC: NEXT STEPS

Penny concluded the meeting by outlining next steps.

- Send signed PDF of written comments to Penny by noon on Friday, June 29, 2018.
- OTC meeting is on July 12, 2018.
- OTC meetings on August 16 and 17 will provide direction to ODOT.
- Application to FHWA submitted on December 31, 2018.

Penny noted the work of the PAC was completed.

The meeting was adjourned at 12:00 pm.



Attachment: Transcribed flip-chart notes taken during PAC 6 meeting

Mitigation priorities

Refer to Section 2.2 starting on page 2-3 of the DRAFT recommendation report.

Do PAC members support a recommendation to the OTC that identifies **these priorities for mitigation strategies** that should be more fully developed as part of congestion pricing?

Support

15

Accept

3

Oppose

0

Discussion:

- Prefer "transportation modes" to options. Are they synonymous?
- Carpool/rideshare – replace ride share with vanpool to differentiate from Uber and Lyft.
- Pleased to see transit called out clearly. Need to go a step further. Transit as part of the program, not a mitigation strategy separately.
 - Imperative transit be in place in Clackamas County before tolling
 - Important to include in program early from an ET perspective
 - Model above and beyond regional RTP
 - Can still be referred to as mitigation strategy, but clarify that it is an integral part of program
- Need to clarify that all 3 mitigation strategies will be considered in development of program
 - Strong support
 - State stronger in report
- Diversion: times when you want to divert local trips, particularly to transit. Not sure "parallel arterials" is correct term – suggest "other arterials"
- Need to consider arterial improvement in prep for diversion. Suggest adding safety improvements to arterials.
 - Too broad. Money will be finite, need to focus on priority improvements
 - "Give safety improvement priority"
 - Others preferred "parallel". Suggest adding both words
- Appreciate line "regardless state of residence." Recommend specifying "Entire regional bi-state system" in paragraph before strategies are introduced
 - No opposition
- Regulatory barriers – need to acknowledge barriers that must be remedied



Modified concept recommendation

Refer to Section 2.3 starting on page 2-5 of the DRAFT recommendation report.

Do PAC members support a recommendation to the OTC that advances pricing projects (**concepts B and modified E**) on **both** I-5 and I-205 **as a pilot for further study**?

Support
10

Accept
6

Oppose
2

Discussion:

- Do B+E provide enough to test the system?
 - Tech team: Answer is yes. B = High congestion, will show effects quickly. Anticipate potential <3 years. E = Revenue objective, have a chance to test revenue generation and diversion. Can be extrapolated to entire system. Local context still significant.
- Any preference to do one pilot before other?
 - Tech team: Projects have an independent value and benefit. Timing: B requires more FHWA involvement. E may require same process or may be simplified through section 129 process. May be deployed simultaneously due to approval process.
- Can't support question as worded. Haven't heard strategies for addressing diversion impacts.
 - Support concept of pilot projects in areas where alternative already exist.
 - Process clarification: Moving forward concepts for additional analysis and questions.
 - Add "for further study" at end of question"
 - § Supported (**see red edits to original question**)
- Concern about terminus and NE Going. Suggest adding blue hashing like concept E.
- Independent study on freight bottlenecks. RQ is 60/100. Concern with one freeway is diversion to other corridor.
- Tech memo stated termini would be re-examined – want reinstated.
- Important to consider alternative routes available
- Whatever we include about analysis of termini should apply to North and South
- Concept B: only alternative is diversion onto local streets
- Is this "either/or" with next question?
 - No – two different principles
- Should we vote on Concept B + Modified E?
 - Appreciate how questions are worded as allows nuanced responses
 - Members received feedback from constituents on concepts
 - Suggest voting on two-tier approach first
 - Add a third question, "In principle, committee recommends a pricing project on both freeways."



- § Ask later under other topics
- § (Question modified to specify implementation of concepts B and modified E as a pilot project)
 - Some would like to see emphasis on C. State long-term first. State pilots are necessary steps to that end.
 - § Not comprehensive as doesn't encompass whole system
- Vote in opposition due to support for concept C first. Want VP set to manage demand. B+E are project finance tools.
 - Others agree but voted support

Do PAC members support a recommendation to the OTC that advances the **two-tier approach**, which starts with two smaller pilot projects (concepts B and modified E) and includes a larger scale phased implementation on I-5 and I-205 (concept C plus looking at the broader system)?

Support
9

Accept
4

Oppose
5

Discussion:

- C is just I-5 and I-205. Are we talking about all area highways?
- What does "comprehensive planning" mean?
 - Not yet determined, PAC can recommend
- Comments received about "why a tiered approach" – after analysis, may want to look beyond I-5 and I-205.
 - Without a definition of success or clarification or projects, difficult to support
 - Question needs to consider "C+": C plus looking at the broader system
- Capacity increase
 - Others note congestion pricing effectively increases capacity
 - Would like to see capacity improvements before endorsing C
- Important to keep this input (support for "C+") in main section of report.
- Like phased approach – C provides no alternatives for Clark County
- Support for pilot before wide implementation
- Support of freight is contingent on capacity improvements

New question: Do PAC members support a recommendation to consider implementing Concept C first?*

Support
8

Accept
1

Oppose
8

*Votes add to 17. Curtis Robinhold did not provide a vote via email as question was added at meeting.



Input on other topics

Refer to Section 2.4 starting on page 2-8 of the DRAFT recommendation report.

Pricing analysis and planning are needed for the **regional freeway system**: I-5, I-205, I-84, I-405, US 26, Hwy 217

Do PAC members support the suggestion that the OTC consider **further** system-wide feasibility analysis **with regional partners** of potential pricing applications on the regional freeway system?

Support
10

Accept
6

Oppose
2

Discussion:

- “Freeway system”: should be broadened, multi-modal system. Important for revenue question as well.
- Would want to look at different ways to introduce pricing. Regional look should not only look at freeways and not assume ODOT would conduct.
 - Simplify to “regional study should be done”?
 - Beyond PAC’s scope. No legislative direction for regional study. Would need to define goals first.
 - “Consider” needs to be synonymous with “study”
 - § “Consider further analysis in partnership with other agencies”
 - Regional freeway system is under OTC’s jurisdiction
 - § Tech team: recommendation written to OTC
- Some would accept, but also want to look beyond freeway system
- Important to clarify timing – after pilots

As the region grows, we need to **plan for adding roadway and public transportation capacity** in a congestion pricing environment

Do PAC members support the suggestion that the OTC develops a plan for future roadway and public transportation capacity increases in a congestion pricing environment?

Support
7

Accept
8

Oppose
1

Abstain
2



Revenue should be used to relieve traffic congestion in the region

Do PAC members support the suggestion that the OTC use revenues from freeway tolling to provide benefits within the region where revenues are collected, for congestion relief and mitigation strategies?

Support

11

Accept

5

Oppose

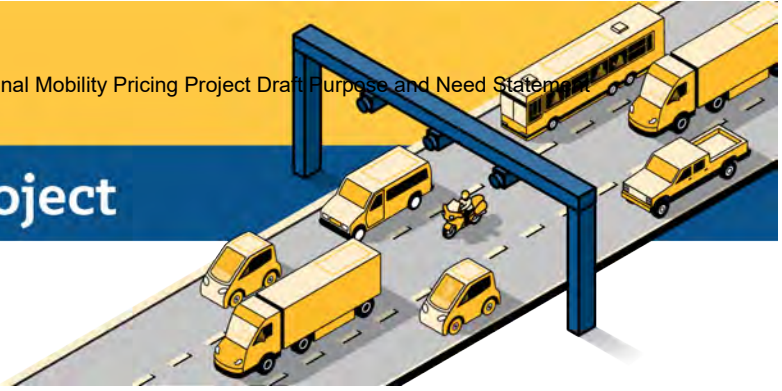
2

Discussion:

- What "region"?
 - Region 1? Still being determined
- Would only support for projects of regional significance
- Support contingent of money going to corridor where it was collected
 - Several agreed
- Needs to comply with state constitution
- Reflect there is support for keeping money "here", understanding this needs to be defined
- Opposition: region continues to grow and expand
- All agree funds should not be spent outside region
 - May already be in statute

Regional Mobility Pricing Project

Draft Purpose and Need Statement



The Regional Mobility Pricing Project needs your input on this draft Purpose and Need Statement, as well as the included Goals and Objectives. With your input, this draft Purpose and Need Statement will be enhanced over time and will guide the formation of Project alternatives, which will later be refined to advance into NEPA. Read on and please share your thoughts by emailing the project team at OregonTolling@odot.state.or.us. Please put "Purpose and Need Statement" in the subject line and send us your comments by [September 30, 2021].

INTRODUCTION

In 2016, the Governor's Transportation Vision Panel held a series of regional forums across the state to better understand how the transportation system affects local economies. The negative effect of congestion in the Portland metropolitan area was consistently identified as one of the key themes across Oregon. Congestion in the Portland region affects commuters and businesses, as well as producers who move their products across the state.

In response to the input from stakeholders across the state, House Bill (HB) 2017 Section 120 directed the Oregon Transportation Commission to develop a congestion relief fund and to seek approval from the Federal Highway Administration to implement congestion pricing (also referred to as value pricing or tolling) on the I-5 and I-205 corridors to reduce traffic congestion in the Portland metropolitan area.

In 2018, the Oregon Transportation Commission and the Oregon Department of Transportation (ODOT) conducted the Portland Metro Area Value Pricing Feasibility Analysis to study how and where congestion pricing could be applied. Substantial public input and a Policy Advisory Committee informed the final recommendations

What is a toll?

A toll is a fee imposed to drive on a road or bridge. Bridge tolls and roadway tolls have been used for centuries to pay for construction and maintenance of the facility. Historically, travelers had to stop and pay in cash, but that is no longer necessary with modern technology (FHWA, n.d.)

Is congestion pricing the same thing?

The term congestion pricing describes a type of tolling where drivers are charged a higher price during peak traffic periods. The higher fee encourages some drivers to consider using other travel options such as carpools or transit, or change their travel time to other, less congested times of the day, or not make the trip at all. If a small percentage of drivers choose another mode of travel or time of travel, it can reduce traffic congestion for those who can't modify their trip and improve traffic flow for the entire system. Congestion pricing is a proven tool to manage congestion based on the experience of multiple congestion pricing projects in operation across the country (FHWA 2017).

Discussion Draft Purpose and Need Statement

Updated August 16, 2021

to implement congestion pricing on all lanes on the I-205 and I-5 corridors in the Portland metropolitan area.¹

ODOT is currently pursuing three toll projects: the Regional Mobility Pricing Project, the I-205 Toll Project, and the Interstate Bridge Replacement Program². ODOT first initiated the I-205 Toll Project in 2019, which at the time proposed congestion pricing on all I-205 lanes on some or all freeway segments between Stafford Road and Oregon Route 213. During a public comment period for the I-205 Toll Project, many commenters and local agencies expressed concerns about fairness, diversion, equity, climate change, and congestion management associated with planning the I-205 Toll Project. ODOT has incorporated that input into this Regional Mobility Pricing Project (the Project), which proposes to implement congestion pricing on all I-5 and I-205 lanes in the Portland metropolitan area, consistent with the longer-term vision that stakeholders advocated for and the Oregon Transportation Commission adopted in 2018.

PURPOSE

The purpose of the Regional Mobility Pricing Project is to implement congestion pricing on I-5 and I-205 in the Portland, Oregon metropolitan area in order to manage traffic congestion on these facilities and to generate revenue for priority transportation projects.

NEED FOR THE PROPOSED ACTION

Daily traffic congestion is negatively affecting the quality of life in a growing region.

Traffic congestion on I-5 and I-205 creates long backups of vehicles traveling at slow speeds—a scenario that many people experience daily while traveling during the morning and evening rush hours. Some of the most significant bottlenecks in the Portland metropolitan area are found on I-5 and drivers experience traffic congestion through these segments that lasts more than 7 hours each weekday:

- Northbound I-5: Broadway to Capitol Highway (6.0 miles, 7.75 hours each weekday)
- Southbound I-5: The Rose Quarter area from Broadway to Rosa Parks Way (3.0 miles, 9.25 hours each weekday)

Between 2015 and 2017, these queues increased 1 hour (ODOT 2018). Free-flow travel time is typically 25 minutes on the I-5 corridor. In 2017, evening peak travel time on southbound I-5 was 100 minutes—a four-fold increase versus free flow.

¹ Please go to https://www.oregon.gov/odot/tolling/ResourcesHistory/20180705_VP-PAC-Rec-to-OTC.pdf for more information on the recommendations from the Policy Advisory Committee.

² In partnership with the Washington Department of Transportation. Please go to <https://www.interstatebridge.org/> for more information on the Interstate Bridge Replacement Program.

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Reoccurring bottlenecks that occur on I-205 last between 3.5 and 4.75 hours (ODOT 2018):

Northbound I-205: Glenn Jackson Bridge to Powell Boulevard (5.8 miles, 4.75 hours each weekday)

Northbound I-205: Abernethy Bridge to I-5 (8.5 miles, 3.6 hours each weekday)

- Southbound I-205: Division to Glenn Jackson Bridge (5.3 miles, 3.75 hours each weekday)

Congested conditions on I-5 and I-205 result in traffic rerouting to other freeways in the region (I-405, US 26, etc.), local streets, and arterial streets. This rerouting results in additional traffic congestion and creates potential safety conflicts. Accident frequency on both freeways and arterials tends to increase with the congestion levels and stop-and-go traffic. The conditions caused by traffic congestion make travel unreliable such that drivers and transit riders cannot predict how long it will take them to get to work, home, services, or childcare arrangements.

Forecasts for the region show that population and employment will continue to steadily grow. The Portland metropolitan area population is expected to grow from approximately 2.5 million residents in 2018 to more than 3 million by 2040 (23%) and more than 3.5 million by 2060 (43%) (Census Reporter 2018; Metro 2016). Since 2011, job growth in Portland has outpaced the nation year over year: In 2019, Portland grew at an average annual rate of 2% compared to the U.S. average of 1.6% (Portland Business Alliance 2020). By 2039, the number of vehicles travelling along the I-5 corridor in the Portland region is projected to be between 127,200 and 192,900, depending on the corridor segment (ODOT 2020), which is an approximate increase of 18% from 2017 traffic counts. Planned roadway projects, improvements in transit, and increased use of active transportation modes (bicycles, walking, etc.) will not fully address the increase in daily trips and hours of traffic congestion (Metro 2018).

Traffic congestion is slowing down economic growth.

Traffic congestion affects the Portland metropolitan area economy through slow and unpredictable travel times for freight, services, small businesses, employers, employees, and low-income earners. From 2015 to 2017, drivers in the Portland region experienced an 18.5% increase in the number of hours of traffic congestion. In 2015, the daily cost of traffic congestion in the Portland metropolitan area was \$1.7 million, which increased to \$2.0 million in 2017. These numbers reflect the economic burden of trucks and cars being delayed on the roadway but do not reflect the environmental and health costs related to motor vehicles, such as vehicle collisions, air pollution, and roadway noise (ODOT 2018).

COVID-19 Pandemic Traffic

Traffic volumes decreased significantly during the early days of the COVID-19 pandemic, and rush-hour traffic congestion has not been as severe as it was before the pandemic. With the economy reopening, vehicle numbers are increasing. As of July 2021, the Portland metro area state-highway volumes are only 3% to 5% below pre-pandemic levels for weekday traffic and 4% to 7% below weekend traffic. ODOT expects that traffic levels will continue to return to pre-pandemic levels and grow in the future. (ODOT 2021)

Discussion Draft Purpose and Need Statement

Updated August 16, 2021

Of the interstate freight routes in the region, I-5 carries the highest freight volume, ranging from 10,000 to 19,000 trucks per day, while I-205 carries the second-highest freight volume, ranging from 7,800 to 14,000 trucks per day (ODOT 2018).

Our transportation system must reduce greenhouse gas emissions by managing congestion.

Climate change is a significant threat to Oregon's economy, environment, and way of life (Gov. Kate Brown 2019). To reduce the negative effects of climate change, Oregon has committed to reducing greenhouse gas emissions by at least 45% below 1990 levels by the year 2035, and by 80% by 2050 (EO 20-04 2020). The transportation sector—particularly personal cars and light trucks—creates approximately 36% of greenhouse gas emissions in Oregon (Oregon Global Warming Commission 2020). Traffic congestion leads to an increase in fuel consumption and carbon dioxide emissions. During congestion, vehicles spend more time on the road, idling or crawling, and undergoing numerous acceleration and deceleration events that leads to an increase in emissions.

To meet the state's goals for greenhouse gas reduction, total vehicle emissions must be reduced by decreasing the number of hours vehicles spend stuck in traffic, the amount of stop-and-go traffic, and the number of miles traveled by motor vehicles in the state.

Revenues from the gas tax are not sufficient to fund transportation infrastructure needs.

Available funding for transportation has not kept pace with the costs of maintaining Oregon's transportation system or constructing new transportation and traffic congestion relief projects. ODOT revenue comes from a mix of federal and state sources. The Federal Highway Trust Fund provides states with roughly 25% of public spending for federal highway and transit projects and is funded primarily by the federal fuel taxes (Sargent 2015). The federal gas tax has not been adjusted since October 1993, and the share of federal contributions to state transportation projects has greatly decreased. On the state level, escalating expenditures to maintain aging infrastructure, the need to perform seismic upgrades for the state's bridges, and rising construction costs have greatly increased financial needs.

Compounding this problem is a substantial increase in travel demand as the state experiences strong population growth, particularly in the Portland metropolitan area. ODOT must explore every possible method for getting the most out of its existing infrastructure, funding traffic congestion relief projects in the region to ease traffic congestion, and planning for increased earthquake resiliency.

Our transportation system must support multimodal travel to reduce congestion.

Multimodal travel accommodates a wide range of travel methods including walking, bicycling, driving, and public transportation. Multimodal streets can increase transportation system efficiency and accommodate more trips in the same amount of space. When effectively integrated, multimodal travel can help advance various environmental, health, and congestion-mitigating benefits for communities. This can result in a reduction of vehicle emissions, which will improve air quality and reduce greenhouse gas emissions (USDOT 2015). Multimodal

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travel provides additional access to populations who do not drive, such as young children, seniors, people with disabilities, low-income residents, and those who do not own a car. (Litman 2021)

The Portland metropolitan area's transportation networks have resulted in inequitable outcomes for historically and currently excluded and underserved communities.

Many urban interstate highways and major civic centers were deliberately built through neighborhoods with concentrations of people experiencing low incomes and communities of color, often requiring the destruction of housing and other local institutions (Federal Register 2021). In the eastern Portland metropolitan area, the construction of I-205 exemplifies these outcomes where the planned highway alignment was changed due to political motivation and public protest (Fackler 2009). The alignment was moved away from Lake Oswego, farther east and south into Clackamas County and farther east in Portland, away from majority white and wealthier cities, reinforcing social and economic inequity (Invisible Walls 2019). In Central Portland during the 1950s and 1960s, the construction of I-5, the Veterans Memorial Coliseum, Emanuel Legacy Hospital, the Portland Public School Blanchard site, and urban renewal programs divided and displaced communities in North and Northeast Portland, affecting and burdening communities of color—especially Black communities—in the historic Albina neighborhood (Gibson 2007).

Because of these discriminatory transportation policies and politics, a geographic mismatch exists between job locations, essential resources, community services, and housing that is affordable (Oregonian 2012). This disproportionality affects communities of color, immigrant communities, people experiencing low income, lesbian, gay, bisexual, transgender, gender non-conforming, and queer (LGBTQ+) individuals and people living with a disability (Federal Register 2021). Members of these communities have fewer transportation options and travel farther between destinations, which increases transportation costs and dependence on unreliable travel options and adds significantly more time in traffic congestion. Collectively, these transportation and land use decisions, and the systems that led to them, have resulted in discrimination and unequal investment in these communities. This leads to lasting trauma and continued economic, social, and health impacts for historically and currently excluded and underserved individuals and communities (Federal Register 2021).

Within denser urbanized areas, there is a greater risk of concentrated air pollutants and heat islands from transportation-related activities. Communities located near major roads can experience increased air pollution from cars, trucks, and other motor vehicles, and can have an increased incident and severity of health problems associated with air pollution exposures (EPA 2014). Higher amounts of traffic, congestion, stop-and-go movement, or high-speed operations can increase the emissions of certain pollutants (EPA 2014).

Managing congestion on the I-5 and I-205 corridors and providing for multimodal transportation options would increase access to valuable community resources for historically

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underserved and dispersed communities. It would also improve air quality within concentrated neighborhoods located along the I-5 and I-205 corridors.

The Project will also implement mitigation measures to avoid additional and compounding negative impacts to these communities.

GOALS AND OBJECTIVES

Project goals and objectives are desirable outcomes of the Project beyond the Purpose and Need Statement. The following goals and objectives reflect input collected during the I-205 Toll Project's Summer-Fall 2020 engagement and from the Value Pricing Feasibility Analysis Policy Advisory Committee, partner agencies, the Equity and Mobility Advisory Committee, and other Project stakeholders; these goals and objectives will be considered when comparing potential congestion pricing alternatives to each other against the future No Build (no congestion pricing) Alternative.

ODOT acknowledges that past land use and transportation investments have resulted in negative cultural, health, economic, and relational impacts to local communities and populations and that these investments have disproportionately affected historically and currently excluded and underserved communities. Additionally, ODOT recognizes that these communities have historically been left out of transportation planning and the decision-making process. These practices, along with more recent gentrification in Portland and surrounding cities, have resulted in a mismatch between job locations and housing in areas with few transportation options.

The draft goals and objectives below, along with input from the Equity and Mobility Advisory Committee, will prioritize equity throughout the Project development process. The Project team will engage communities who use or live near the Project area, especially those who have been historically and are currently excluded and underserved, to participate throughout the formation of conceptual alternatives, development and narrowing of alternatives, decision-making, and Project implementation, monitoring, and evaluation process.

- Goal: Provide benefits for historically and currently excluded and underserved communities.
 - Maximize benefits and minimize burdens associated with implementing congestion pricing.
 - Support equitable and reliable access to job centers and other important community places.
 - Support equitable and reliable access to health promoting activities.
 - Design the congestion price system to support travel options for people experiencing low incomes.
- Goal: Limit additional traffic diversion from congestion pricing on I-5 and I-205 to adjacent roads and neighborhoods.

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- Design the congestion pricing system to limit rerouting from of trips away from I-5 and I-205.
- Design the congestion price system to minimize impacts to quality of life factors, such as health, noise, safety, job access, travel costs, and environmental quality for local communities from traffic rerouting.
- Goal: Support multimodal transportation choices to provide travel options and reduce congestion.
 - Support shifts to higher occupancy vehicles (including carpooling) and other modes of transportation (for example, taking transit, walking, biking, teleworking).
 - Collaborate with transit providers to support availability and enhancements to transit and other transportation services parallel to the congestion priced corridors, especially for historically and currently excluded and underserved communities.
- Goal: Support safe travel regardless of the transportation mode.
 - Enhance vehicle safety on I-5 and I-205 by reducing congested conditions.
 - Support safe multimodal travel options (for example, walking, bicycles, transit, and automobiles) on roadways affected by congestion pricing.
- Goal: Contribute to regional improvements in air quality that reduce contributions to climate change effects.
 - Contribute to reduced vehicle air pollutants and greenhouse gas emissions in the Portland metro area by reducing congestion, therefore resulting in more consistent vehicle speeds, less vehicle idling, and fewer overall motor vehicle emission hours on I-5 and I-205 and on local roadways affected by congestion pricing.
 - Reduce localized air pollutants by reducing congestion and improving travel efficiency, particularly in community areas where pollutants may be concentrated due to traffic congestion.
- Goal: Support regional economic growth.
 - Provide for reliable and efficient regional movement of goods and people through the congestion priced corridors.
 - Provide for reliable and efficient movement of goods and people on local roadways affected by congestion pricing.
 - Improve regional access to jobs and employment centers, especially for historically and currently excluded and underserved communities.
- Goal: Support management of congestion and travel demand.
 - Design the congestion price system to improve efficient use of roadway infrastructure and improve travel reliability.

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- Goal: Maximize integration with future congestion price systems and other transportation systems.
 - Design a congestion price system that can be expanded in scale, integrated with congestion pricing on other regional roadways, or adapted to future congestion price system applications.
 - Design a congestion price system that is interoperable with other transportation systems in the region and nearby states.

Consistent with the requirements of 23 U.S.C. 168, the information in this document, and the public and agency input received, may be adopted or incorporated by reference into a future environmental review process to meet the requirements of the National Environmental Policy Act.

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References

Consistent with 23 CFR 450.212 (a)-(c) and 23 CFR 450.318(a)-(d), the following documents and studies were used in preparation of this Statement of Purpose and Need and are incorporated by reference. These materials are publicly available using the weblinks provided.

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Oregon Transportation Commission sets direction for tolling

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Oregon Transportation Commission sets direction for tolling

Aug. 16, 2018

Contact: Dave Thompson, 503-860-8021

JOHN DAY -- During its Aug. 16 meeting in John Day, the Oregon Transportation Commission considered the recommendations of its 25 member Portland Metro Area Value Pricing Policy Advisory Committee and provided direction to ODOT on preparation of an application to the Federal Highway Administration to implement tolling.

In 2017, the Oregon Legislature directed the OTC to seek federal approval of a congestion pricing plan. In July, the advisory committee submitted recommendations to the OTC. The recommendations include an initial tolling pilot program at two locations in the Portland Metro area:

- All I-5 lanes between approximately Northeast Going Street/Alberta Street and Southwest Multnomah Boulevard, a stretch of about seven miles through the downtown Portland corridor.
- On or near the George Abernethy Bridge on Interstate 205.

Tolling could be used to both manage congestion and generate revenue to address highway bottlenecks, including by potentially funding the I-5 Rose Quarter and I-205 Stafford Road to Abernethy Bridge improvement projects.

The advisory committee recommendations also identified three priorities for mitigating potential impacts of any future tolling program:

- Improved public transportation and other transportation options to address equity and mobility
- Special provisions for environmental justice populations, including low-income communities
- Diversion strategies to minimize negative impacts

The OTC accepted the advisory committee's recommendations to seek to toll the two segments of I-5 and I-205 and directed ODOT to prepare an application to the Federal Highway Administration seeking approval to toll these segments. ODOT will present this application for the OTC's approval on November 16. By law, the application must be submitted by December 31, 2018.

The OTC also provided direction that any toll revenues from within the metro region be placed in a Congestion Relief Fund to invest in improvements to the transportation system in the region, as directed in HB 2017. The Oregon Constitution requires that any toll revenues be invested in roads.

ODOT will work with federal officials to determine the next steps to move tolling forward. Before receiving final federal approval to implement tolling, ODOT will conduct additional traffic and revenue analysis, undertake in-depth analysis of equity and diversion impacts, and engage the public with significant outreach and public comment opportunities. ODOT anticipates that it will be a number of years before tolling is implemented on Portland area freeways.

"We've heard consistently from Oregonians across the state that congestion in the Portland metro area is hurting our livability and impacting our economy. Tolling can help us both manage demand and finance bottleneck relief projects that will provide people a better commute and help us keep commerce moving," said Tammy Baney, chair of the Oregon Transportation Commission. "But before we implement tolling we still have a lot of work to mitigate the potential impacts of tolling, particularly to address the potential impacts on low-income families, but also to find ways to improve public transit and address diversion of traffic off the freeway."

OTC member Alando Simpson, who co-chaired the advisory committee, praised its members for their work. "Everyone rolled up their sleeves to wrestle with the tough questions," said Simpson. "By bringing everyone around the table, the process helped us move this discussion forward. We now have two potentially viable options for how to use congestion pricing to improve Portland's transportation system."

"We are in the early stages of discussing tolling, and we have a lot to do to design a comprehensive program to reduce congestion in the Portland region," noted OTC member Bob Van Brocklin. "We are all aware that our population is growing dramatically, and that we will need to invest more in our infrastructure from a range of funding sources to keep up with that growth."

Consistent with the advisory committee's recommendation to analyze the benefits and impacts of tolling on other roadways, the OTC also provided direction to separately develop a long-term study of congestion pricing on all Portland metro area freeways including Interstate 84, Interstate 405, U.S. 26 and Oregon 217. ODOT will develop an approach for implementation, including policy review, potential geographic scope, timing, estimates of resource needs, and OTC oversight. ODOT will provide a draft proposal for OTC discussion in November and present a refined proposal for OTC approval before the end of January 2019.

OTC member Sean O'Hollaren, who served as the other co-chair of the advisory committee, emphasized how the OTC responded to comments from the public, including residents of southwest Washington. "Our partners across the Columbia River expressed concerns that exploring tolling on I-5 and I-205 would unfairly target people commuting from Washington. We listened and adopted a more comprehensive approach that will look at all freeways, not just those used by Washingtonians to get to work."

“Congestion in Portland that traps trucks in traffic impacts the economy of the entire state,” said Commissioner Martin Callery of North Bend, who formerly worked for the Oregon International Port of Coos Bay and served as vice-chair of the Oregon Freight Advisory Committee. “We need to look for creative solutions that will keep freight moving so we can keep Oregon businesses strong and produce family-wage jobs.”

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U.S. Department
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**Federal Highway
Administration**

Oregon Division

January 8, 2019

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In Reply Refer To:
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Ms. Tammy Baney
Chairperson
Oregon Transportation Commission
355 Capitol Street NE, MS #11
Salem, OR 97301-3871

Mr. Matthew L. Garrett
Director
Oregon Department of Transportation
355 Capitol Street NE, MS #11
Salem, OR 97301-3871

Dear Ms. Baney and Mr. Garrett:

Thank you for your December 10, 2018, letter expressing your interest in pursuing tolling on segments of Interstate 5 (I-5) and Interstate 205 (I-205) in the Portland region. You asked that I address the following: 1) eligibility and other requirements under federal tolling programs; 2) required project refinement and analysis to obtain a classification determination under the National Environmental Policy Act (NEPA); and 3) the anticipated timeline and opportunities to streamline review under NEPA. Below is a response to these topics.

Question 1: Eligibility and other requirements under federal tolling programs.

The report transmitted with your December 10 letter, titled *Oregon Application to FHWA: Value Pricing Feasibility Analysis and Proposed Implementation*, presents an I-205 Project (page 1-4) and an I-5 Project (page 1-6). Additional project detail is needed for a final eligibility determination by the Federal Highway Administration (FHWA), however, the I-205 Project is likely eligible for tolling under both Section 129 of Title 23, U.S.C. (Section 129) and the Value Pricing Pilot Program (VPPP), while the I-5 Project is likely eligible for tolling under the VPPP.¹

Section 129 provides authority for tolling Federal-aid highways in conjunction with construction, reconstruction, or other capital improvements to highways, bridges and tunnels. While revenue generation is commonly the driving reason for tolling under Section 129, a state may implement a time-of-day tolling (pricing) strategy under this mainstream tolling program.² Under Section 129, public agencies may impose tolls on Federal-aid highways in the following instances:

¹ Title 23 of the United States Code (Highways) includes a general prohibition on the imposition of tolls on Federal-aid highways. However, Title 23 and other statutes contain exceptions to this policy. Two mainstream federal tolling programs and two pilot programs offer states opportunities to use tolling to generate revenue to support highway construction activities and to implement priced managed lanes on Federal-aid highways. The two mainstream tolling programs that do not require an agreement with the federal government or approval from USDOT/FHWA are presented in Section 129 and Section 166 of Title 23. The VPPP and the Interstate Reconstruction and Rehabilitation Pilot Program (ISRRPP) are pilot programs that can be used to advance a tolling project. Both pilot programs require USDOT/FHWA approval. All four federal tolling programs are discussed in detail at https://www.fhwa.dot.gov/ipd/tolling_and_pricing/tolling_pricing/federal_tolling_programs.aspx.

² Pricing involves the imposition of fees or tolls that vary based on the level of demand for travel on a highway facility. The fees may vary according to a fixed schedule or in real-time based on actual travel conditions. Also, known as congestion pricing, value pricing, variable pricing, peak-period pricing, or market-based pricing - this

- Initial construction of a new highway, bridge, or tunnel
- Initial construction of new lanes on highways, bridges, and tunnels (including Interstates), as long as the number of toll-free lanes is not reduced
- Reconstruction or replacement of a bridge or tunnel
- Reconstruction of a highway (other than an Interstate)
- Reconstruction, restoration, or rehabilitation of an Interstate highway, as long as the number of toll-free lanes is not reduced

Therefore, under Section 129, the State of Oregon is permitted to toll all lanes of the Abernathy Bridge if the bridge is replaced or reconstructed. The state would also be permitted to toll all lanes of mainline Interstate bridges that are replaced or reconstructed as part of the project. Placing tolls on all lanes of Interstate 205 beyond the immediate approaches to replaced or reconstructed bridges, is permitted under Section 129 only if the conditions above are met, particularly, that the number of toll-free lanes is not reduced. As the OTC/ODOT develops a tolling strategy for the I-205 Project, eligibility under Section 129 will be more fully understood.

Federal law does not provide FHWA authority to approve the tolls, the specific toll rates, or exemptions, as the state owns, operates and controls these facilities. Additionally, tolling agreements are no longer required by Section 129, however, under existing implementing guidance, state departments of transportation and other public agencies responsible for toll facilities are encouraged to enter into a memorandum of understanding (MOU) with FHWA.^{3 4} An MOU can be particularly meaningful in light of requirements for audits and the use of toll revenues, and the potential consequences of noncompliance (including the discontinuation of toll collection). Typically, under Section 129 a contract for physical construction must be awarded before tolls may be collected.

The State of Oregon may also pursue authority to impose tolls on Federal-aid highways under the VPPP, a program that uses pricing to control travel demand and address congestion. Authority to use tolls under this program requires approval by USDOT/FHWA. The VPPP was first authorized under the Section 1012(b) of the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA), as amended under other laws, most recently in Section 1604(a) of the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). While discretionary funding is no longer provided, the authority to use tolling as a tool to address congestion remains in force, and FHWA enters into or modifies existing cooperative agreements for tolling projects under the VPPP, consistent with the pilot authority.

strategy manages demand by imposing a fee that varies by time of day, direction of travel, type of vehicle, number of occupants, or other factors. While pricing generates revenue, this strategy also seeks to manage congestion, environmental impacts, and other external costs.

³ In 2012, the Moving Ahead for Progress in the 21st Century Act (MAP-21) removed the earlier requirement that State or local public agencies execute a tolling agreement with FHWA prior to imposing tolls under Section 129.

⁴ As shown in FHWA's sample MOU template, located at https://www.fhwa.dot.gov/ipd/tolling_and_pricing/tolling_pricing/sample_mou_template.aspx, suggested elements of the MOU include documenting the eligibility for tolling a Federal-aid highway facility under Section 129 and outlining how the statutory requirements regarding the use of toll revenues, audits, and other federal requirements will be met.

The VPPP is a pilot program designed to assess the potential of different value pricing approaches for reducing congestion. Under the VPPP, tolls may be imposed on existing toll-free highways, bridges, and tunnels, and variable pricing is used to manage demand. The legislation also requires a state that implements tolling under this program to report on the outcomes (impact on travel times, transit, air quality and low income/minorities). There is also a requirement that a state consider the potential impacts on low income drivers. Congress has authorized up to 15 slots under the VPPP, which are allocated to state or local agencies. Oregon currently holds a VPPP slot that was recently used to evaluate peer-to-peer car sharing in Portland. This VPPP slot is also being used to support the OTC/ODOT's current effort to explore additional congestion pricing projects in the Portland region.

Oregon would need to develop a VPPP tolling plan, conduct an environmental review under NEPA, and enter into a cooperative agreement with FHWA to implement a VPPP project. The VPPP tolling plan should address how tolling will manage congestion in the corridor, how tolling revenues will be used for construction, and the effect tolling has on traffic patterns, facility operations, and financing. A key element of the VPPP tolling plan, is a traffic and revenue study. The traffic and revenue study serves to provide understanding of the tolling, traffic, and financing aspects of a project. This work then serves to inform the project's environmental review under NEPA. The limits of the VPPP project corridor identified must include the construction project to which the toll revenues will be applied.⁵ Also, there have been circumstances under the VPPP where tolls have been collected in advance of construction.

Question 2: Required project refinement and analysis to obtain a classification determination under the National Environmental Policy Act (NEPA).

Should NEPA be required, Oregon's decision to implement a tolling project in the Portland region should be informed by an in-depth traffic and revenue study, public engagement, and environmental review under the requirements of NEPA.⁶ These in-depth studies will provide an understanding of the operational impacts to the system and the overall feasibility of the project, as well as serve to educate and inform the project owner, the FHWA, and the public on natural and human environmental impacts, and the viability of tolling in the region.

The report entitled *Oregon Application to FHWA: Value Pricing Feasibility Analysis and Proposed Implementation* presents a high-level scoping of two potential tolling projects, the I-205 Project and the I-5 Project. Prior to initiating a formal NEPA analysis, ODOT should better

⁵ For tolling under the VPPP, the toll revenue provision (section 1012(b)(3)) of Public Law 102-240) has been implemented under the cooperative agreements which provide that the revenues first be used within the defined VPPP corridor for operating and capital costs of the project. Any revenues in excess of those costs may be used on other eligible title 23 activities, without limit to the defined VPPP corridor. Similarly, for tolling under Section 129, 23 U.S.C. Section 129(a)(3) authorizes excess revenues to be expended on any Title 23 eligible activity without limit to project limits, provided the state certifies that the toll facility is adequately maintained.

⁶ Reliance on Section 129 for tolling authorization does not by itself trigger the need for FHWA to conduct NEPA review for the tolling project. The general rule is that major federal actions, including commitments of federal funds and other types of federal approval decisions require NEPA review. If the state does not seek to use Federal-aid (or other federal funds subject to Title 23 requirements, such as TIFIA credit assistance) and FHWA has no approval action to take (e.g., no Interstate access change approval or design exception approval), there is no requirement under current law to undertake a NEPA review. Other federal requirements that apply and are typically addressed in the NEPA review, like Title VI, would continue to apply whether, or not NEPA requirements are applicable.

define the proposed project and evaluate its impacts. Issues that require additional analysis include but are not limited to: establishing tolling in Metro's fiscally constrained transportation plan; defining tolled alternatives; evaluating toll methods and rates; analyzing environmental justice impacts; and analyzing transportation system impacts, including the impacts of traffic diversion.

A traffic and revenue study would inform a discussion with affected communities and provide a better sense of the significant impacts of the action and therefore the appropriate NEPA classification, i.e., Categorical Exclusion (CE), Environmental Assessment (EA) or Environmental Impact Statement (EIS).

Question 3: The anticipated timeline and opportunities to streamline review under NEPA.

A state's request for authority to toll under the VPPP is typically accompanied by confirmation that the necessary state legislative approvals are in-place, completed or nearly complete studies that support the tolling request (including traffic and revenue study), and completed or nearly complete necessary NEPA environmental review. Figure 3 of the *Oregon Application to FHWA: Value Pricing Feasibility Analysis and Proposed Implementation* report presents a timeline for advancing the tolling projects. The duration of such work is influenced by many factors and it is largely dependent on the approach and manner taken to manage the project(s). After satisfactory completion of the above items, the FHWA's approval of tolling projects under the VPPP has typically been a straight forward process, commonly taking as little as a few months.

Finally, the FHWA cannot overemphasize the value of a transparent public involvement, outreach, and marketing effort to inform the region on the realities and myths of tolling, the issues the OTC/ODOT seeks to address, and the state's vision for tolling in the region. An aggressive public involvement, outreach, and marketing effort serves to streamline the overall project delivery.

We look forward to continued close coordination with the OTC and ODOT on this very important tolling discussion. Please contact myself or Nathaniel Price at nathaniel.price@dot.gov or (503) 316-2566 with questions.

Sincerely,



Phillip A. Ditzler
Division Administrator

Tolling Program Adjustments

This document is meant to document and summarize adjustments needed for the STIP, MTIP and RTP to allocate \$60M approved by the OTC in March 2021 to three separate STIP projects for the ODOT Tolling Program.

Actions:

- Historical STIP administrative adjustment: Rename K21371 to “Regional Mobility Pricing Project” - add \$1,642,110 to Planning (PL) for a new total project cost of \$21,200,000
- Full STIP, MTIP and RTP amendment: Add new project: “I-205 Toll Project” - Total cost \$27,257,890 - Preliminary Engineering (PE) phase only
- ODOT Statewide STIP amendment: Add new project: “Statewide Toll Development Implementation” - Total cost \$19,100,000 - Statewide project (Non-MPO). This does not require MPO action.

All funds are from \$60M OTC allocation. After these amendments \$12M will be unallocated.

Funding Summary

Project	Current Funding	Proposed Funding
\$60M OTC funding Allocation for Tolling Program	\$60,000,000	\$12,000,000
Regional Mobility Pricing Project	\$19,557,890	\$21,200,000
I-205 Toll Project	\$0	\$27,257,890
Statewide Toll Development Implementation	\$0	\$19,100,000
TOTAL	\$79,557,890	\$79,557,890

Project Change #1

Regional Mobility Pricing Project (K21371)				
Current STIP Description	Planning study to analyze traffic, diversion and community benefits and impacts, concept refinement and stakeholder engagement for congestion (value) pricing on I-5 and I-205.			
Summary of requested changes	<ul style="list-style-type: none"> • Rename to “Regional Mobility Pricing Project” • Add \$1,642,110 to Planning (PL) phase • New total project cost of \$21,200,000 			
Justification	This is part of programming \$60M in funds approved by the OTC March 11, 2021 for the ODOT Tolling Program. FHWA has asked ODOT to create distinct projects for the related work programs that are planned for this funding. Also, some of the work proposed has moved from planning to design activities. This project’s adjustments will single out the RMPP part of the Tolling Program and add funding to complete the planning component of the Regional Mobility Pricing Project - formerly referred to as “I-5 and I-205: Portland Metropolitan Value Pricing Program”.			
RTP Requirements	This project change does not require RTP adjustment because it is planning.			
STIP/MTIP requirements	There is no STIP/MTIP requirement, however, the already authorized funds will be increased to cover the anticipated gap needed to complete the planning work. Metro has been informed.			
Phase	Year		STIP Estimated Cost	
	Current	Proposed	Current	Proposed
Planning	2019	2019	\$19,557,890	\$21,200,000
	Totals		\$ 19,557,890	\$21,200,000
Summary of Expenditure Accounts (as of 09/03/2021)				
Phase	Authorized		Expended	
Planning	\$19,557,890		\$10,221,389	
			\$9,336,501	

Project Change #2

I-205 Toll Project (22507)

Proposed STIP Description	Project design and environmental review for tolling on I-205 between Stafford Rd and OR 213.				
Summary of requested changes	<ul style="list-style-type: none"> Add new project for I-205 Tolling Allocate \$27,257,890 to Preliminary Engineering (PE) phase Total project cost of \$27,257,890 				
Justification	This is part of programming \$60M in funds approved by the OTC March 11, 2021 for the ODOT Tolling Program. FHWA has asked ODOT to create distinct projects for the related work programs that are planned for this funding. Also, some of the work proposed has moved from planning to design activities. This project addition is specifically for design work for I-205 Tolling.				
RTP Requirements	<p>Two RTP updates are related to this project.</p> <ul style="list-style-type: none"> Add project (PE) to fiscally constrained list Update narrative description of I-205 Improvements project to describe financial connection between the two projects <p>RTP amendments require a 45-day public notice and also must go through TPAC, JPACT, Metro Council approval path. R1 Policy & Development and the Urban Mobility Office (UMO) is the lead on this action and is working to start the process as soon as possible.</p>				
STIP/MTIP requirements	This requires a formal STIP/MTIP amendment, approval is contingent upon approval of the RTP amendment. Amendment submitted to Metro 9/7/21.				
Phase	Year		STIP Estimated Cost		
	Current	Proposed	Current	Proposed	
Preliminary Engineering	N/A	2022	\$0	\$27,257,890	
		Totals	\$0	\$27,257,890	
Summary of Expenditure Accounts (TBD)					
Phase	Authorized		Expended		Remaining
Preliminary Engineering	TBD		TBD		TBD

Project Change #3

Statewide Toll Development Implementation (K-TBD)					
Programming note: This project will be set up by Salem Program & Funding Services.					
Proposed STIP Description	Planning and design for statewide back office operations and tolling technology - This project will be set up by Salem Program & Funding Services.				
Summary of requested changes	<ul style="list-style-type: none"> Statewide Toll Development Implementation Allocate \$19,100,000 to Planning (PL) phase Total project cost of \$27,257,890 				
Justification	This is part of programming \$60M in funds approved by the OTC March 11, 2021 for the ODOT Tolling Program. FHWA has asked ODOT to create distinct projects for the related work programs that are planned for this funding. This project addition is specifically for Statewide Toll Development Implementation.				
RTP Requirements	No RTP requirement because this will be a statewide program.				
STIP/MTIP requirements	This requires a formal STIP/MTIP amendment.				
Phase	Year		STIP Estimated Cost		
	Current	Proposed	Current	Proposed	
Planning	N/A	2022	\$0	\$19,100,000	
		Totals	\$0	\$19,100,000	
Summary of Expenditure Accounts (TBD)					
Phase	Authorized		Expended		Remaining
Planning	TBD		TBD		TBD

Major Work Elements for I-205 Toll Project

Strategic Communications, Coordination, and Public Involvement Plan

Consultant shall prepare a Public Involvement Plan (“PIP”), utilizing its understanding of the Portland Metro region and NEPA guidelines for public engagement. The PIP must be Section 508 compliant for Americans with Disabilities Act (“ADA”) Accessibility to electronic and information technology (29 U.S.C. §794d). The PIP must be informed by existing research, knowledge and input from the Advisory Committee and must include: goals, objectives, metrics of success, key messages, audiences, strategies and tactics, and schedule. The PIP must include outreach and education strategies specific to the general public (commuters, businesses, community members, and other constituencies). The PIP must enable a diverse set of stakeholders to receive information and to provide input.

Consultant shall include robust planning for communications activities in the PIP. The PIP must outline a strategy and timeline for all communication within the PIP. The PIP must include a cohesive Project narrative with messaging supported by data and surveys. The communications activities must include all communities and must support outreach and equity strategies.

Elements described in PIP must include:

- Target audiences, key messages, types of communication and outreach tools to be used, and media plan, and a schedule of outreach activities designed to reach stakeholders;
- Public involvement goals, objectives and outreach evaluation measures for success;
- A detailed community and stakeholder analysis using an evaluation of community demographics and recommendations for non-English language translation of public information materials;
- Strategies to infuse environmental justice considerations into every aspect of the Project in accordance with the Equity Framework and Environmental Justice Outreach Plan;
- Strategies to effectively coordinate with media and elected officials, in accordance with Media and Government Relations Plan;
- Detailed Agency and Consultant roles and responsibilities; and
- A general schedule of anticipated PIP activities and deliverables.

Consultant shall be responsible for keeping and monitoring the Project’s public involvement schedule and summary of all public and stakeholder outreach activities, involvement, events, outreach materials and tools.

The following milestones are anticipated:

- Early Project start
- Early outreach prior to starting I-205 NEPA
- Project NEPA: Purpose and need and range of alternatives
- Oregon Toll Program Public awareness: Increase understanding of tolling purpose, operations and benefits

- Project NEPA: Draft Environmental Assessment
- Project NEPA: Refinement of preferred alternative and equity strategies
- Project Final Environmental Assessment/FONSI (“Finding of No Significant Impact”)

Information Materials

Handouts and other materials will be needed to convey technical and complicated information to the public in readily accessible formats, consistent with appropriate federal and state accessibility guidelines.

Consultant shall develop tools and content to enable online public engagement and education, including Public Project Website content, a Social Media Plan/Schedule, and content for email updates to an interested parties list sent via GovDelivery system.

Consultant shall develop a digital advertising plan and content and coordinate an ad buy (up to 5 rounds as directed by Agency) to increase awareness and education about tolling and the Project environmental process. Includes content creation, translations, and captioning.

Public Events and Community Outreach

Consultant shall complete this task in accordance with Federal Highway Administration (“FHWA”) guidance on NEPA-acceptable community engagement. Consultant shall coordinate online or in-person public events and briefings to educate and engage a variety of audiences. Consultant shall schedule the events in coordination with APM or Agency staff, and arrange logistics, venue rental, and supplies.

Public Events

The following rounds of engagement are anticipated to require public events or community outreach:

- Project NEPA: Purpose and need and range of alternatives
- Oregon Toll Program Public awareness: Increase understanding of tolling purpose, operations and benefits
- Project NEPA: Draft environmental assessment
- Project NEPA: Refinement of preferred alternative and equity strategies
- Project Final Environmental Assessment/FONSI

For each engagement round there will be up to 4 locations/digital events. The number of rounds and locations will be as directed by Agency. If in-person open houses are not possible, up to 4 webinars or digital/virtual engagement events must be held for each round, at Agency direction. Consultant shall prepare and maintain event plans for each round of engagement that includes a schedule of steps/action items and due dates to achieve; this event plan will be used to maintain organization and track adherence to the timeline. Consultant shall secure/book open house locations, if held in-person. Display boards or meeting materials must be prepared for each round of engagement; the same information must be presented at each meeting location during each round. Up to 12 Consultant staff shall be available to attend each of the public events (virtually or in-person), with actual number of attendees at Agency’s direction, to be held in the

Portland Metro area, including Clark County. Additionally, Consultant shall arrange for up to 4 interpreter staff to be present at each virtual or in-person event as needed or required by Agency. The number of rounds of open houses, locations and Consultant staff attending each event will be solely determined by Agency.

Consultant shall schedule and facilitate open house preparation meetings in coordination with Agency prior to each open house. Consultant shall draft meeting agenda and materials 14 business days prior to the open houses. Agency will have 5 business days to review and provide comments on the agenda and meeting materials. Consultant shall prepare content for online open houses using Agency-provided, or Agency-approved, template. Consultant shall distribute meeting materials 24 hours in advance of open house and post on the Public Project Website provided by the Agency. Consultant shall develop and implement plans for event notification and publication, as well as propose the appropriate stakeholder distribution list. In addition, Consultant shall prepare and purchase public notification advertisements in local news outlets for each round of engagement in up to 8 publications following Agency approval. Consultant shall send scheduled meetings in outlook for the in-person events. Consultant shall develop a meeting plan for Agency approval that includes outreach goals, logistics, notification tools, printed handouts specific to the open houses, messaging, displays, staffing and the public comment process. Consultant shall conduct online engagement/education surveys. Consultant shall prepare open house summaries for each meeting.

Up to 8 online public engagement surveys, including translations, must be prepared by the Consultant. Surveys must:

- Be informed by up to 2 planning meetings with a Survey expert for each survey instrument.
- not exceed more than 3 open-ended survey response questions for comment coding purposes.
- be translated and used during environmental justice outreach activities and responses must be translated. Community liaisons (Consultant) must assist with creation and translation of surveys.

Community Outreach

Consultant shall engage the public and share information through community-based activities. Objectives of these outreach activities are to determine how to best meet community needs, build relationships, provide Project information and gather public input. The consultant must research and prepare a Community-Based Outreach Plan to connect with community organizations and participate in events across the region prior to scheduling and planning participation. The plan should:

- Provide an updated list of community stakeholders and create a distribution list including email, city and affiliation.
- Establish a “tool kit” to support planning and execution of each outreach event. Tool kit must include comment form, sign in sheet, materials, and template for event summary.
- Outline activities, such as community briefings and event tabling’s, informal interviews walk audits, neighborhood tours, bike rides, and tactical urbanism pop-ups.

Consultant shall plan and participate in up to 6 tabling events and 66 individual activities (72 total activities), up to 3 hours each, attended by up to 2 Consultant staff, as determined by Agency. Consultant shall support ongoing coordination and education of Community-Based organizations (up to 16 hours per month, for a total of 550 hours). Consultant shall prepare up to 72 written monthly summaries of community outreach events to be incorporated into general communication reports.

Project Videos

Consultant shall create up to 12 high-quality short videos (30 seconds to 2 minutes per video), as determined by Agency describing congestion pricing, the scope of the Project, and opportunities for involvement. Consultant shall also support Agency to create up to 12 longer videos that repurpose meeting presentations into a simple Project update video (informal meeting preview videos prepared via Zoom recording) for posting on YouTube (up to 15 minute videos). Up to 4 hours of Consultant support per video. Agency will prepare and finalize video presentation materials using existing information; Consultant shall support production of video.

Equity Strategy & Equity and Environmental Justice Outreach

Consultant shall develop an Equity Strategy and Environmental Justice (“EJ”) Memorandum, the primary audience of which is internal Agency members of the Project team and the Equity and Mobility Advisory Committee (“EMAC”). The memorandum will set the basis for the internal work session. The memorandum must define key terms to promote common understanding, update the Feasibility Analysis literature review of other congestion pricing/tolling programs to identify national best practices, update potential criteria and technical tools and methods for evaluating alternatives for Equity considerations and impacts to EJ populations, and summarize measures that have been used to enhance pricing benefits and avoid, minimize, or mitigate pricing impacts. Consultant shall plan and implement an in-person internal Agency work session for up to 6 Consultant staff lasting up to 4 hours to summarize and discuss the information within the Equity Strategy and EJ Memorandum and collaboratively plan the equitable outreach approach. This approach will also be informed by the Advisory Committee.

Based on the work conducted in the Feasibility Analysis and results of the Agency work session, Consultant shall prepare an Equity and EJ Outreach section of the PIP that will describe how minority populations, low-income populations, and limited English proficient populations will have meaningful opportunities to provide input at key Project milestones. This section must include a list of Community-Based Organizations (“CBOs”) and stakeholders and identify areas within the four-county Portland metro area (Washington, Multnomah, Clackamas and Clark counties) with concentrations of low-income populations, minority populations, and limited English proficient populations. The Equity and EJ Outreach section must describe how outreach activities will inform the ongoing approach to public engagement and how outreach activities will inform the Equity and EJ technical analysis. The Equity and EJ Outreach section must update how input from these populations will be documented and considered during decision-making and must be developed in accordance with FHWA guidance on NEPA-acceptable community engagement and the United States Department of Transportation (“U.S. DOT”) Updated Environmental Justice Order (5610.2(a)).

Prior to each Project milestone, Consultant shall develop outreach materials that query: 1) equity priorities, 2) ways to enhance Project benefits and avoid or minimize potential adverse impacts, and 3) potentially disproportionately high and adverse impacts to low-income populations and minority populations and potential mitigation measures. Consultant shall prepare content for presentations, Public Project Website, online surveys, display boards and newsletters. Consultant shall document feedback gathered while implementing the Equity and EJ Outreach activities in the comment management system and summarize how the feedback was used in decision-making.

Based on the stakeholder interviews that were conducted for the Feasibility Analysis, Consultant shall conduct up to 15 in-person interviews, as determined by Agency, with CBOs and stakeholders. During the interviews, Consultant shall query Equity priorities and potential benefits and impacts of the Project on low income and EJ populations. Consultant shall summarize CBO and stakeholder input in an interview summary report which must inform the PIP, the Equity and EJ evaluation criteria and performance measures, and the Equity and EJ analysis. Strategies in the Equity and EJ Outreach section must include options to compensate or incentivize individuals or Community-Based Organizations to enable broad participation.

During implementation of the Equity and EJ Outreach section, Consultant shall, at the direction of the Agency:

- provide event co-hosting and additional Advisory Committee participation and preparation to community leaders, CBOs or other interpreters to conduct environmental justice activities, such as focus groups in non-English languages or presentations at existing faith-based or CBO-hosted events;
- brief and train community leaders, CBOs or other interpreters to ensure competency and knowledge of the Project to support environmental justice activities;
- provide for children's activities, translation, interpretation, refreshments and participant compensation or incentive at each activity;
- compensate CBO staff to aid with engagement of traditionally underrepresented populations; and
- translate online public engagement surveys for use during EJ outreach activities and translate responses.

Prior to NEPA milestones, Consultant shall prepare a compiled Outreach Findings: Equity and EJ Impacts Briefing Document, to summarize the outreach findings from the CBO and stakeholder telephone interviews, the EJ outreach activities, briefings with EJ groups, and EJ input from the broader outreach activities such as open houses and online surveys. The findings must be included in the report. The NEPA milestones may be as follows:

- Project NEPA: Purpose and need and range of alternatives
- Public awareness: Increase understanding of tolling purpose, operations and benefits
- I-205 NEPA: Draft environmental assessment
- I-205 NEPA: Refinement of preferred alternative and equity strategies
- Project Final Environmental Assessment/FONSI

Equity Workshops/Meetings

Consultant shall provide for and facilitate 4, 2-hour workshops or meetings, as determined by Agency, in Oregon with select groups (these meetings may be held virtually). These workshops will be organized by Agency and the Consultant; up to 6 Consultant staff shall attend. Consultant shall be responsible for the agenda, content, facilitation, and assessment of learning/outcomes. Consultant shall develop a single set of materials for use in all workshops and shall modify materials for workshops #2-3 based on the audience and the relevant feedback from prior workshops. These workshops are expected to take place on separate dates. The workshop must include pre- and post-survey instrument to assess learning and key issues among workshop attendees.

Alternative Public Involvement Strategies

Consultant shall determine if there are alternative strategies and innovative approaches which could be recommended for the Project. Consultant shall recommend and identify the most cost effective alternative strategies which must produce a measurable behavior change in stakeholders and affected populations regarding the Project. Consultant shall describe each alternative strategy, when and how it would be implemented and the estimated costs of each alternative strategy. Each alternative strategy must include, but is not limited to, a timeline for implementation of the Project's various elements.

Community Liaison Services

To better engage with under-served communities (low-income, communities of color, etc.), Agency has begun utilizing new approaches that have proven successful from a comprehensive and inclusive public engagement standpoint. These new approaches include, but are not limited to, bringing on community liaisons who are members of marginalized communities in the Project area or who come from CBOs that serve those marginalized communities. 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 Agency, facilitating meaningful representation of that community and their interests within a public process.

The Community Liaison Services shall provide include but are not limited to:

- a. Identifying marginalized and vulnerable communities in a Project's impact area, including Title VI and EJ Populations.
- b. Identifying the most commonly spoken languages in the impacted surrounding area to the Project and assess which language communities have limited English proficiency.
- c. Interviewing influencers, service providers, and community leaders from different cultural/immigrant/religious backgrounds to gain insight on how to effectively engage their communities in Agency's Project.
- d. Consultant shall organize and execute community-based events and provide interpretation and translation services.
- e. Consultant shall also serve on the Project groups or advisory committees to provide fully inclusive perspectives as requested by Agency.

- f. Participating in debrief sessions with Agency to share findings and how engagement efforts could be improved in the future.

Advisory Committee

Transparency and informed decision-making are fundamental to the successful development of tolling projects. This Task will include establishment, or use of, and facilitation of the Equity and Mobility Advisory Committee (“EMAC”) that will provide input to the Oregon Transportation Commission (“OTC”) or the Project team on the Project equity framework, equity and mobility performance measures, and equity and mobility strategies to improve Project outcomes. The EMAC also will advise and support implementation of equitable engagement plans during the Project planning process.

Consultant shall also support creation of meeting materials and final recommendation document to OTC and graphic layout of recommendation document. Consultant shall support creation of longer videos that repurpose meeting presentations into a simple project update video (informal meeting preview videos prepared via Zoom recording) for posting on YouTube (up to 15 minute videos). Agency will prepare and finalize video presentation materials using existing information; Consultant shall support production of video.

Media and Government Relations Support

Consultant is responsible for proactively, creatively, and effectively developing methodologies and strategies for Project outreach to media and governmental entities in the Project area. Consultant shall assist Agency with implementing a Media and Government Relations Plan that anticipates key public concerns, issues, and questions and develops methodologies and strategies for proactive response. Consultant shall prepare meeting materials and agendas and attend coordination meetings with Agency staff, as determined by Agency. Consultant staff, as determined by Agency, shall attend the meetings to provide a Project progress report and schedule, update the Agency on existing and potential public, stakeholder, or political issues, risks, concerns, and questions and propose outreach strategies. Up to 8 consultant staff shall attend up to 150, 1-hour coordination meetings as requested by Agency.

Consistent with the overarching strategy and guiding principles contained in the PIP for the Project, specific and focused government and media relations plans must be written for defined milestones (e.g. NEPA public engagement for I-205 corridor) by Consultant. Consultant shall develop milestone-specific plans during the Project as determined by the Agency.

Include key points and observations from these meetings in the summary reports requested below.

Consultant shall support media outreach, including draft media releases and specific strategic responses when requested by Agency. Consultant shall monitor media and social media coverage for the Project using Agency-supplied accounts, maintain scan of public events and meeting agendas of key entities (councils, commissions, other bodies), and understand opportunities for public education and correction of misinformation.

OTC, Legislature, Jurisdictional or other Leadership Presentations and Outreach

Consultant shall make up to 92 presentations per schedule agreed upon by Agency for OTC, the Legislature, or other leadership forums and jurisdictional briefings, such as city councils, county commissions and working groups. Consultant staff shall attend each OTC/Legislature meeting, as determined by the Agency. The presentations must provide Project updates to the OTC/Legislature and may seek decisions or guidance. Consultant and Agency understand that the demands of the Legislative Assembly and its committees may require expedited or unscheduled responses to their needs for presentations. Consultant and Agency agree, therefore, to make, good-faith efforts to respond to and accommodate those demands within the hours set forth below.

Consultant shall support Agency staff with updates to other regional committees which includes the Joint Policy Advisory Committee on Transportation (“JPACT”) and the SW Washington Regional Transportation Council (“RTC”) and Region 1 Area Commission on Transportation. Agency will lead these updates or workshops.

Stakeholder Outreach to Support Technical Analysis

Consultant shall work with the APM and technical team to develop a public engagement process that fully supports inputs and schedule for the technical analysis. The public engagement process includes Equity Strategy and EJ Outreach, broad community outreach, EMAC, Regional Partner Agency Staff (“RPAS”), Community Work Sessions, Regional Modeling Group (“RMG”), and Transit Working Group. Points of input include:

- Stated preference surveys
- Evaluation criteria and performance measures
- Alternatives development
- Transit and multimodal findings
- Community and Equity Mobility Strategies

The Alternatives Analysis will be informed by Community Work Sessions. Consultant shall plan and facilitate 4 Community Work Sessions. The work sessions must inform Project specific equity and mobility strategies. Consultant shall provide agenda, materials, and meeting notes for up to 4, 2-hour Community Work Sessions per schedule agreed upon by Agency. These must consist of sessions with neighborhood and community groups with up to 4 Consultant staff attending as directed by Agency. Consultant shall facilitate each Community Work Session to provide information and solicit input.

Consultant shall support the gathering of a Transit Multimodal Working Group (“TMWG”) that includes Agency staff engaged in transit or related planning, potentially including city and county staff, TriMet, C-Tran, Smart, Metro, and ODOT staff engaged in transit and travel options. The TMWG is expected to meet up to 12 times throughout the Project and will be an opportunity for the Consultant and the Project team to understand key issues and transit planning efforts underway. Recommendations from the TMWG may include:

- A. strategies to improve transit or other transportation / mobility options

B. affordability and accessibility programs for low-income and environmental justice groups

The Transit Working Group may provide input on the Project purpose & need, performance measures, and alternatives options and alternatives options.

Technical Analysis and Outputs

During the Feasibility Analysis, a general project description for the Project was developed and approved. However, details concerning policy outcomes, functional and tolling system design, user impacts, and specific Project end points were not determined. The congestion pricing project advanced for further analysis require conceptual and design refinement. Details related to Project design, including policies, business rules, tolling application, and Project termini, must be determined based on traffic performance, transit availability, revenue and diversion potential, benefits and impacts to EJ and other communities, federal toll program eligibility, among other considerations. The Project will be designed to maximize benefits and minimize potentially adverse impacts, identifying offsetting mobility and equity strategies where appropriate. Alternatives analysis for I-205 will be conducted to meet NEPA requirements.

Consultant shall manage a transit/multimodal, equity and diversion technical analysis including alternatives and community mobility/equity strategy development. Consultant shall document decisions to comply with U.S. DOT standards for the NEPA EA process and development of an EA.

Alternatives Analysis Evaluation Framework

Alternatives for the Project must incorporate design options for the congestion pricing policy itself (where, when, who, and how much to charge) as well as the technological solutions, infrastructure requirements, legal framework, and business models that represent the alternative as deployed. Consultant also must evaluate a no-build / no pricing alternative throughout the process.

The performance measures will be documented in an Evaluation Criteria and Performance Measures Memorandum which also identifies the quantitative tool or qualitative analysis that will inform their evaluation; the performance measures must also be included within discipline-specific methodology reports. Measures must be informed by the potential need for offsetting strategies and to meet the requirements in the NEPA environmental documentation process. Evaluation frameworks must include both quantitative and qualitative performance measures that address, the following. Additional measures may be identified.

- Traffic and safety performance on tolled segments of I-205, non-tolled segments, and local routes along the tolled corridor;
- Route diversion to and from the freeway system and the local transportation system;
- Modal diversion to other travel modes (transit, carpooling, bicycling, etc.);
- Time diversion of trips to different times of day;
- Impacts on transit ridership and evaluation of transit needs under tolling;
- The extent of impacts and benefits to environmental justice households;
- Regional economic benefit impacts of tolling;

- Revenue expectations and the cost of the tolling system; and
- Impacts of tolling on air quality and other environmental resources.

I-205 Corridor User Analysis

In this Task, Consultant shall inform the alternatives development, screening, and analysis through enhanced understanding of travel behavior and socioeconomic effects for existing and potential users of the tolling project area.

Consultant shall perform Origin-Destination analysis to identify existing Project corridor users who could be impacted by tolling projects. Consultant must summarize key freeway travel patterns, including geographic location of high demand origins/destinations, percent of external/through trips utilizing the corridors, and potential for rerouting (diversion) on parallel or adjacent roadways. The analysis of corridor users will be based on the regional travel demand model and external mobility vendor (e.g., StreetLight) data sources. The results must be used to inform existing user patterns and potential strategies related to addressing needs related to transit/multimodal, equity, and diversion.

Forecasting potential users of tolled facilities depends on assumptions related to values of travel time. Consultant team shall review and reassess current value of travel time assumptions. Any updates to modeled values of time will be based on available information from existing studies and other external data sources.

A stated-preference travel survey must be developed by Consultant as a tool to develop reliable estimates of the willingness-to-pay travel time savings of passenger vehicle drivers I-205. Consultant shall develop methods for estimating values of travel time, values of travel time reliability, and other related pricing inputs to the analytical tools and methods with input from Agency, Metro, and Regional Modeling Group.

Alternatives Screening

Consultant shall use the screening evaluation criteria developed as well as input provided by all levels of engagement including, but not limited to, the Advisory Committee, public and Community Work Sessions and equity groups, and work with the Agency, partners, and public to:

- Identify the no-build / no-pricing alternative (baseline) for I-205 based on assumptions identified in earlier phases;
- Identify reasonable alternatives which incorporate defined alternative policies, design features, system components, and operational procedures, with logical termini on I-205 generally within the area of recommended concepts from Feasibility Analysis;
- Document all assumptions and actions that build towards alternatives;
- Compare screening alternatives based on evaluation criteria and performance measures;
- Document and support the rationale for eliminating alternatives from further consideration; and
- Perform initial screening analysis modeling. Prepare additional sensitivity analysis to inform development of Alternatives Analysis for NEPA.

Consultant shall prepare toll rate sensitivity analysis and recommended refinements to the Alternatives to inform policy assumptions for modeling. Consultant shall prepare additional modeling refinement and documentation to support alternatives decision making and policy assumptions.

Toll Modeling Coordination

To maintain the modeling development and execution schedule and deliverables, Consultant shall prepare agendas and materials, facilitate and produce action item summaries for weekly modeling team meetings that include Agency, Consultant, and Metro staff. In addition, to gain input from regional modelers, Consultant shall schedule, prepare agendas and materials, facilitate, and produce meeting summaries for a Regional Modeling Group, which is composed of modeling staff members at regional agencies and governments, in addition to Agency, Consultant, and Metro staff. Consultant shall prepare and deliver monthly modeling team “newsletter” summaries to technical working groups.

Technical Support for Alternatives Modeling and Tools Refinement

Model development and its application for Project alternatives is being led by Metro. Consultant shall process and interpret model results. Consultant shall provide technical support to Metro in model development, calibration, validation, and refinement.

Consultant shall develop the specific methodology and assumptions for analysis. The analysis must include both quantitative and qualitative assessments based on modeling results, community engagement, and other available sources of information. Modeling of alternatives performance must include regional travel demand modeling, mesoscopic modeling of traffic (dynamic traffic assignment), regional cost/benefit and equity impact analyses, and toll/revenue optimization. Modeling of alternatives must occur in concert with the Advisory Committee, as well as the Agency and Metro, with input from a Regional Modeling Group. Consultant shall identify assumptions for the no-build / no-pricing alternative model using FHWA and regionally accepted forecast years and define model horizon years and analysis time periods. The Modeling Methodology Technical Memorandum must include an inventory and rationale for projects assumed to be completed and key policy decisions or assumptions in the future year models.

I-205 will be analyzed in the following manner:

- Two rounds of preliminary modeling to focus on addressing potential for through-trip rerouting via toll gantry logic.
- Round 1 - A screening analysis for Project team use must use existing modeling tools to provide relative comparisons between up to 6 alternatives. The analysis must include Consultant’s development of a range of strategic alternatives, incorporating preferred policies, design features, system components, and operational procedures, and screening of these screening alternatives. Screening of up to 5, I-205 alternatives must be conducted by Consultant independently of tolling alternatives on I-5 and must inform a smaller set of promising alternatives to be evaluated in the NEPA document. Initial traffic and revenue projection and sensitivity analysis to provide a high-level assessment simultaneous I-205 and I-5 tolling (using preliminary assumptions about I-5 tolling design) and a no-build + toll option to consider the interim effects of tolling I-205 at the existing Abernethy Bridge during

re-construction and adjacent widening of I-205 as well as a future year (2040) model scenario.

- Round 2 – Scenario refinement testing must be performed to assess sensitivity to technical assumptions related to policy decisions and toll rate schedules. The sensitivity testing will be performed on one baseline scenario identified from round 1. Consultant shall summarize modeled changes to gross revenues and traffic volumes (diversion).
- Round 3 - A smaller set of alternatives must be developed and modeled in more detail for the draft EA. This analysis must include two future horizons, representing an interim future build timeframe (2027) and a longer-term horizon (2040 or 2045) consistent with the Metro Regional Transportation Plan to reflect changes in land use. This will be used to inform the analysis of impacts in the NEPA document.
 - This analysis will also be used to prepare traffic and revenue projections for the I-205 Level 2 T&R studies. Additional alternatives or toll scenarios varying rates and policies within the alternatives, may be required for these studies to better understand toll elasticities and willingness to pay tolls by market segment and time of day.
 - To support the I-205 Level 2 Traffic and Revenue (“T&R”) Study, Consultant shall evaluate a no-build + toll option to consider the interim effects (2027) of tolling I-205 at the existing Abernethy Bridge during re-construction and adjacent widening of I-205.
- Round 4 - Analysis to support the final EA must be conducted by the Consultant on the preferred alternative identified in the draft EA. This analysis may include modeled evaluation for transit or other mitigation strategies as needed or required by the Project. This analysis may include several model runs to refine the alternatives to address Project impacts.

In addition to the formal rounds of modeling, Consultant shall provide scenario model runs and alternatives testing to inform strategic decision making.

Consultant shall support the modeling work by refining available tools and providing key inputs needed to support Metro in running the models. Consultant work shall include:

- Regional Travel Demand model refinements to support Project modeling of tolls including recommended network coding changes, generalized cost parameters for tolls (based on value-of-time assumptions and monetary tolls), time-of-day model specification, and compiling model results.
- Dynamic Traffic Assignment subarea model development support including direction on toll scenario application modeling software (Dynameq), network coding support, demand adjustment procedures, development of calibration and validation criteria, summarizing calibration and validation results, documentation of model development process for subarea, and compiling model results. Consultant team shall also run models in Dynameq as needed to support Metro.
- Multi-criteria evaluation tool (MCE) refinement to support toll modeling evaluation including segmented traffic assignment, 24-hour model results, and breakout of toll costs from generalized cost. Consultant team shall support Metro in providing model documentation and parameters to support ODOT review and acceptance of tool application for the Project. Consultant shall provide ongoing support to Metro for application of tolling

projects within Metro Multi-Criteria Evaluation Toolkit to support equity analysis and impact assessment.

Transit and Multimodal Transportation Analysis and Planning

Consultant shall explore and evaluate the relationship between tolling on I-205 and existing transit and multimodal transportation options. This evaluation must identify improvements to non-motorized travel mode systems as a component of a successful tolling implementation.

Consultant shall conduct a transit and multimodal analysis for I-205 that must include the following essential elements:

- Description and mapping of existing transit and multimodal transportation systems relative to I-205;
- Description and mapping of planned transit and multimodal transportation systems relative to I-205;
- Identification of transit and multimodal transportation network improvements, including safety improvements, to support successful tolling implementation.

Consultant shall prepare a draft and final Existing Conditions for Transit and Non-Motorized Travel Modes Potentially Impacted by the I-205 Tolling Corridors Memorandum for Agency review and comment.

Equity Analysis and Environmental Justice Analysis

Consultant shall provide ongoing support to Metro for application of tolling projects within Metro Multi-Criteria Evaluation Toolkit for equity analysis and impact assessment. Consultant shall work in collaboration with the Agency, Advisory Committee, and Metro modelers to develop equity and EJ draft and final evaluation criteria and performance measures for tolling on I-205 that are aligned with Project goals and objectives related to equity and EJ. Consultant shall use industry best practices from transportation pricing and tolling projects when developing performance measures. Consultant shall consider the use of a combination of vertical equity analysis, horizontal equity analysis, and spatial equity analysis when assessing the alternatives with respect to equity. The assessment of potential benefits and impacts to EJ populations will incorporate national best practices such as those identified in the National Cooperative Highway Research Program (“NCHRP”) *Environmental Justice Analysis when Considering Toll Implementation or Rate Changes* and relevant guidance from FHWA. Consultant shall incorporate information gathered from Equity Strategy and EJ Outreach activities to inform this Task.

Community, Mobility and Equity Policy for Congestion Relief

Consultant shall prepare an Equitable Toll Report in partnership with ODOT. This report must summarize the equity work prepared throughout the course of the Project. This report must describe the equity strategy and framework developed for the Project and how these have been implemented; findings from equity and environmental justice outreach; and findings and mitigation measures from the equity analysis performed for the Social and Environmental Justice Technical Reports.

ODOT may desire to seek programs, infrastructure and strategies to lessen the impacts of tolling and advance equity beyond the mitigation actions identified as part of the Project NEPA process. Community, mobility and equity strategies must be developed for the Project by EMAC, also called EMAC's recommendation to OTC. ODOT, with support from the Consultant team, will take EMAC's recommendation and assess it for elements ODOT can implement, partner on, or influence.

Traffic and Revenue, Costs and Net Revenue, and Financial Planning

Annual Traffic and Revenue Forecasts

Consultant shall prepare toll annual T&R forecasts for the one or two build alternatives carried forward in the NEPA process. Consultant's revenue estimates must be based on the weekday modeling outputs for at least two forecast years for traffic on tolled sections I-205. It is anticipated that additional model runs will be conducted to provide at least one toll scenario/alternative for a no-build toll case to estimate the near-term traffic and revenue for the option of tolling I-205 at or in the vicinity of the Abernethy Bridge during re-construction of the bridge and widening of I-205 from two to three lanes. Consultant shall use existing available traffic data from ODOT for the relevant tolled sections of I-205 under the alternative(s) to be evaluated in NEPA to inform the development of separate traffic and revenue weekday to annual expansion factors for expanding weekday daily modeling results to annual traffic and potential gross toll revenue forecasts. Consultant shall make assumptions about a single option for a weekend variable toll rate schedule on I-205. These assumptions will be informed by the existing weekday and weekend traffic data, informed by the weekday toll schedule alternatives for each corridor.

Consultant shall develop assumptions for interpolating traffic and revenue forecasts between the 2 model forecast years, extrapolating those forecasts beyond the last forecast year, and escalating toll revenues from constant model-year dollars to inflated year-of-collection dollars in order to prepare revenue models for I-205 that will provide 35-year annual traffic and potential gross toll revenue forecasts for each corridor's Alternatives. Consultant shall capture the impact of any incremental tolls for secondary payment methods or other toll policies and exemptions in the revenue model and resulting annual traffic and potential gross toll revenue forecasts.

Consultant shall prepare a T&R Memorandum summarizing assumptions, traffic forecasts, and potential gross toll revenue forecasts for each Alternative carried forward under NEPA, and if requested by Agency, with and without the option of tolling I-205 during re-construction.

Cost Analysis and Net Revenue Projections

Consultant shall develop annual Operating and Maintenance ("O&M") cost estimates for the in-lane roadway toll system infrastructure on I-205 as well as the program-wide back-office toll collection systems and customer service center functions for all-electronic toll collection, with costs allocated proportionately to I-205 for alternatives that include pricing on both facilities. Consultant shall conduct this work in close conjunction with ODOT, recognizing work that has already been done under the ODOT Open Architecture project and consistent with its assumptions. Assuming that a license plate image-based method of payment via vehicle owner identification and invoicing by mail will be offered for non-account, unbanked and out-of-state

users, industry assumptions for back-office customer service and toll collection processing costs will be used to develop those additional toll O&M costs. Other costs, including credit card processing fees, insurance premiums for structures (if identified and provided by ODOT), and transponder pass purchase and inventory costs must also be estimated. It may not be necessary to consider the latter at this stage if the Agency makes the assumption that transponders will be sold at cost, since that would make them effectively net revenue neutral.

Consultant shall conduct preliminary back-office systems planning, which may include preliminary capital costs, requirements, and procurement strategies in coordination with work to be performed. Capital cost estimates will be used to inform and prepare estimates for periodic Repair and Replacement (“R&R”) costs (capital re-investment) that would typically be required over time at various intervals.

ODOT, or other parties, will provide roadway and structure O&M and R&R prices, quantities, frequencies and current dollar cost estimates for the I-205 Alternatives carried forward in NEPA or prepare full estimates for the O&M and R&R facility costs. Consultant shall forecast annual I-205 facility O&M and R&R amounts in year of expenditure dollars over the forecast horizon, which will be presented separately from the toll-related costs.

Consultant shall make reasonable assumptions for annual revenue leakage due to equipment errors, violations and non-payment, based upon the toll payment methods assumed, tailored to the tolling methods and deployment assumed for I-205. The revenue model will be expanded to handle costs and leakage, so as to provide 35-year net toll revenue projections for the alternative(s) to be evaluated in NEPA.

Consultant shall prepare net revenue tables for the I-205 alternatives to show annual toll trips, potential gross toll revenues, facility O&M costs, toll O&M costs, other deductions, resulting net toll revenues, and periodic toll and facility R&R costs for the 35-year forecast horizon. Additional net revenue tables must be prepared by Consultant with the option of tolling during construction if requested by the Agency.

Funding Strategies and Financial Planning and Support

Consultant shall analyze and evaluate candidate non-toll funding sources, toll-financing options, and other related funding strategies to help develop feasible financial plans for I-205 or Preferred Alternatives carried forward in the NEPA process. Activities under this task are envisioned to be conducted individually on a level of effort basis at the discretion of ODOT, and may include, but are not limited to, the following work items among others that could be identified at a later date:

- Preparing a preliminary financial capacity analysis of the potential capital funding from tolling I-205, with and without tolling during construction, based on the preliminary round of modeling for this corridor.
- Developing a cash flow model / financial plan for the capital and operating aspects of one or more Alternatives, showing the various sources and uses of funds, funding gaps, and options for closing the gaps due as requested by Agency;
- Additional preliminary financial capacity modeling of the potential toll capital funding contribution from financing against future net toll revenues on I-205 based upon later

rounds of modeling, which may include assessing the benefits of a U.S. DOT Transportation Infrastructure Finance and Innovation Act (TIFIA) loan and private sector financing in the event of a public-private partnership delivery model;

- Tabulation and evaluation of potential federal, state and local funding sources that might be available to help fund capital improvements as requested by the State;
- Phased delivery approaches that combine pay-as-you-go funding from toll revenues with toll financing as requested by Agency; and

I-205 Level 2 Traffic and Revenue Study Report

Based upon the travel demand modeling and traffic analysis work and the I-205 T&R forecasts and net revenue projections, Consultant shall prepare a draft and final I-205 Level 2 T&R Study report and slide deck with the following content by sections:

1. Executive Summary
2. Introduction
3. Current Corridor Characteristics
4. Socio-Economic / Land Use Projections
5. Value of Time Assumptions
6. Demand Model Application and Methodology
7. Toll Alternatives / Scenarios Modeled
8. Estimated Weekday Model Results
9. Annual Gross Toll Traffic and Revenue Forecasts
10. Annual Net Toll Revenue Forecasts
11. Sensitivity Tests

I-205 Environmental Assessment Transportation Technical Report

The purpose of this Task is to provide transportation, multimodal (bike, pedestrian and transit) and traffic analysis work to support the NEPA compliance effort, and project delivery strategy for the Project.

Consultant shall conduct traffic and multimodal forecasting and operations analysis of the proposed project alternatives. This includes revisiting the technical foundation to document changes in travel demand, key traffic patterns, and identifying the need for critical operational or safety enhancements to address potential congestion/mobility and multi-modal access impacts.

Data Review and Collection

The first step in documenting existing conditions will be a review of the multimodal transportation data within the study area for other corridor planning efforts. The transportation analysis will leverage available multimodal transportation and traffic data including data collected as part of the efforts as well as other efforts to be identified in conjunction with ODOT and their partners. Following a review of the relevant data available, a list of data gaps and data collection needs must be prepared by the Consultant. This may include the following:

- AM and PM peak period intersection turn movement traffic counts for study area intersections
- 24-hour traffic (tube) counts on key roadways
- Updated vehicle classification volumes on I-205

- Signal timing and phasing data for the study area intersections
- Roadway geometry data and pedestrian/bicycle amenities in the vicinity of the project
- Historical crash data for I-205 and other roadways identified as being significantly impacted by the Project.
- Transit routes and ridership on I-205
- Key emergency responders in the vicinity of the Project
- GIS data representing parcel boundaries, right of way, critical areas, topography, and utilities
- Project area aerial imagery

Consultant shall assume AM/PM peak hour traffic counts will be conducted at a total of fifty-five intersections for an average weekday conditions and tube counts will be collected at a total of ten locations. However, if traffic volumes appear to be low, the consultant may use historical data or collect counts and adjust using an agreed upon methodology. It is assumed that up to 20 AM/PM historical intersection counts will be obtained, and 24-hour tube counts at up to 10 locations. Additional volume and vehicle classes will be provided by ODOT for I-205 mainline for periods reflecting existing conditions analysis. Traffic count data must be collected for average weekday conditions on mid-week days (Tuesday, Wednesday or Thursday).

Existing and Future No Build Conditions

Once the transportation data review is complete and all data pieces have been compiled, Consultant shall initiate the analysis of existing conditions analysis including traffic conditions to gauge current levels of delay during critical periods of the day (ex. AM and/or PM peak period). Consultant shall update and calibrate obtained existing Synchro/SimTraffic or Vissim simulation models using current traffic data from ODOT and partner agencies, as available. This analysis must cover the study intersections agreed upon in the Transportation Analysis Methodology and Assumptions Memorandum.

Consultant shall assume traffic operations analysis will be conducted at a total of fifty-five intersections for an average weekday condition.

Synchro 10 software (with Highway Capacity Manual reporting) will be the primary analysis tool used to assess traffic congestion and operational constraints at study intersections. For complex operations or corridor, Vissim 11 microsimulation software may be used to capture vehicular queuing or merge/diverge movements if determined to be necessary.

Consultant shall inventory pedestrian and bike amenities and key activity generators in the study area, current transit usage on or near I-205 in the Project vicinity, and existing freight demand. Consultant shall identify historical crashes along the freeway segment and key interchange approaches.

To assess future baseline conditions, Consultant shall develop traffic forecasts reflecting a 2045 planning horizon. The forecasts will be informed by the analysis and modeling. Future baseline conditions must include review and documentation of relevant financially constrained transportation projects identified in locally adopted Transportation System Plans in Study Area API.

Consultant shall perform an analysis of future baseline traffic conditions for the AM and PM peak hours by leveraging the Synchro or Vissim models developed as part of the existing conditions analysis and must capture the same study area roadways and relevant study intersections within the study area. Based on expected traffic conditions, year 2045 future baseline conditions for transit and nonmotorized modes will also be assessed. Assumptions about future conditions of truck freight demand, land use changes, or other planned or programmed improvements in the study area must be documented and incorporated into the future baseline conditions analysis.

Findings must be documented in up to two PowerPoint Presentations. Consultant shall prepare for and facilitate Traffic Analysis Review Workshops to arrive at acceptance of the analysis, to be held within 5 days of completing Existing and Future No Build traffic analysis. Up to 5 Consultant staff shall attend.

Build Alternatives Analysis

Consultant shall analyze future transportation access and mobility reflecting up to 3 build alternatives for the I-205 project in comparison to the future No Build alternative. Since the build alternatives will generally include tolling and/or capacity improvements (adding one or more travel lanes plus other off-freeway improvement strategies, transit service enhancements or multi-modal safety projects), traffic volume projections must be developed for each alternative. Analysis of the future build alternatives shall be conducted for the same study area and using the same modeling tools employed for existing conditions and future no build conditions.

In addition to the traffic analysis work, Consultant shall assess how effectively the alternatives address key deficiencies related to transit, nonmotorized modes and freight (truck) mobility, safety, emergency response as well as impacts to community, equity, environment, and economy.

I-205 Draft EA Transportation Technical Report

To document the transportation analysis approach, analysis and findings, a technical report must be prepared by Consultant that captures the analysis assumptions, approach, data, and alternatives assessment outcomes. This report must recap the existing conditions and future No Build assessment and present a performance comparison of the I-205 alternatives based on the Alternatives Analysis technical summary. The report must be included as an appendix to the draft EA, and key elements of the technical report must also be summarized in the draft EA document.

I-205 Final EA Transportation Technical Report

The I-205 Draft EA Transportation Technical Report shall be updated by Consultant to address comments and new analysis identified as a result of public comments. The revised technical report will be included as appendix to the final EA. A comment resolution meeting shall be facilitated by the Consultant with the Agency, up to 2 hours and up to 3 Consultant staff attending.

I-205 NEPA Documentation

The purpose of this Task is to provide the NEPA documentation needed to inform and document a federal decision on tolling on I-205. This Task will prepare an EA that builds on the I-205: Stafford Road to OR 213 Documented Categorical Exclusion (“DCE”). The construction impacts of widening I-205 and reconstruction of the Abernethy Bridge have received environmental clearance under the DCE; therefore, the NEPA process conducted under this Task will only analyze those additional impacts that result from the tolling action. Consultation under Section 106 of the National Historic Preservation Act (“NHPA”) and consultation under the Endangered Species Act (“ESA”) has already been completed for the I-205: Stafford Road to OR 213 and therefore will not be performed as part of this Task.

I-205 NEPA Early Public Engagement

Consultant shall prepare a draft and final agenda and packet of materials for an agency coordination meeting with participating agencies. Consultant shall attend and facilitate the participating agency coordination meeting with ODOT staff, as determined by Agency. Consultant shall prepare a draft summary of the agency coordination meeting for review by ODOT. Consultant shall revise and incorporate the meeting summary into the Early Engagement Summary Report.

Consultant shall prepare a draft and final agenda and packet of materials for an early engagement meeting with tribes, as well as individual meetings with tribes. Consultant staff shall attend and facilitate the tribal engagement meeting and individual meetings with tribes with ODOT, as determined by Agency. Consultant shall prepare a draft summary of the tribal engagement meeting and individual tribal meetings for review by ODOT. Consultant shall revise and incorporate the meeting summary into the Early Engagement Summary Report if completed during the same time frame.

Consultant shall prepare an Engagement Summary Report that documents the activities undertaken during the early engagement phase including notices, agency coordination meeting, public meeting, scoping comments received, and responses to comments.

This task includes ongoing task coordination prior to commencement of technical work.

I-205 Draft EA Technical Reports and Memoranda

Consultant shall coordinate with ODOT to “right-size” the level of analysis for each resource guided by the ODOT EIS Template (2010). Consultant shall prepare stand-alone technical reports for resources with more extensive potential impacts anticipated or for which more in-depth analysis is required as determined by ODOT and FHWA in consultation with Consultant. All analysis in the technical reports must follow the methodology identified in the Methodologies Technical Memoranda as approved by ODOT and FHWA and will utilize the information prepared for the I-205: Stafford Road to OR 213 DCE to the extent it is applicable. Technical reports must analyze the potential construction, direct, and indirect impacts of up to a total of 3 Project alternatives as determined by Agency, including a No Build Alternative, and must identify potential mitigation measures.

Draft #1 of each technical report must contain the affected environment section only and must be prepared by Consultant for review by ODOT. ODOT's comments must be addressed by Consultant in draft #2. Draft #2 of each report must also include assessment of impacts and identification of potential mitigation and must be prepared for review by ODOT. Draft #3 must address ODOT's review comments and be prepared for review by FHWA Division Office. Participating agencies will review technical report during the Draft EA comment period. The technical reports must be finalized to address FHWA comments. FHWA will have 3 days to backcheck changes after reports are finalized. Point-by-point responses to ODOT and FHWA comments must be prepared by Consultant. All technical reports must be included as appendices to the I-205 Draft EA.

Description of Alternatives

Consultant shall prepare a description of the alternatives being evaluated in the draft EA, which must include graphics and tables illustrating the alternatives and identifying similarities and differences among them.

The description of alternatives must be used as the basis for identifying impacts in the technical reports and must be included as a section in those reports. The description of alternatives must also serve as the foundation for the alternatives chapter in the Draft EA.

List of Performance Measures

Analysis presented in the technical reports must address the performance measures previously developed. This list will serve as the basis for comparison of the impacts and benefits of the alternatives studied in the EA document. Consultant shall coordinate with ODOT to update list of performance measures up to 4 times to incorporate input from the EMAC and TMWG.

The list of performance measures must identify data source/tools to be used to assess each measure, and whether it will be identified qualitatively or quantitatively.

Air Quality

Consultant shall prepare an Air Quality Technical Report that addresses the existing conditions, Project impacts, and compliance with the Clean Air Act. Project impacts must address emissions of criteria pollutants and mobile source air toxics ("MSAT") with and without the proposed Project.

The report must include air-monitoring data from the nearest monitors located within close proximity to the Project area and a discussion of attainment status. The API is in attainment of the National Ambient Air Quality Standards ("NAAQS") and does not require a detailed Project-level analysis to demonstrate that there would be no exceedance of the NAAQS. A general discussion of air pollutant emissions expected during construction and any construction mitigation measures must be included in the report.

Consultant shall determine if the Project requires a quantitative MSAT analysis based on FHWA Interim MSAT guidance (FHWA, 2016) and discussions with ODOT and FHWA. Consultant shall use "FHWA Frequently Asked Questions for Conducting Quantitative MSAT Analysis for FHWA NEPA Documents, ("MSAT FAQ")" as guidance for conducting the MSAT quantitative

analysis. If emissions modeling is required, it must be conducted by Consultant using EPA's MOVES3.0.1 with Project-specific inputs from the traffic analysis for existing conditions, 2045 No Build, and up to 2 Build alternatives for 2027 and 2045 as determined by Agency. Consultant shall participate in a meeting (virtual) between Consultant traffic engineers and air modelers and ODOT prior to developing methodology. Consultant shall summarize the methodology, traffic inputs, MOVES inputs, modeling results and conclusions in the Air Quality Technical Report.

Conditions and Assumptions

- Traffic data should be obtained for a full day of operations.
- The Project study area should include all roadways within the construction limits plus freeway and arterials that would be affected by the Projects. Consultant may apply FHWA's recommended criteria of 5% or 10% screening to ADT, travel time and delay to all traffic data modeled, to identify traffic links beyond freeway that should be included in MOVES analysis.
- Consultant shall run MOVES in county level. MOVES must use only running exhaust, crankcase, evaporative permeation and evaporative fuel leaks as they occur on the roadway. For major intermodal freight facilities, off-network vehicle activities must be characterized differently.
- MOVES inputs must be updated for LEV and ZEV to reflect that Oregon has adopted the California LEV and ZEV vehicle requirements since 2009.
- Consultant shall use MOVES inputs from Metro but must update Vehicle Type VMT and average speed distributions with project specific data.
- Consultant shall properly account for diesel particulate emission by one of two methods outlined in the FAQ MSAT guidance.
- Consultant shall have traffic data meeting prior to methodology meeting to understand what type of traffic data is available.
- Consultant shall provide draft methodology prior to modeling
- Consultant shall provide figures identifying the locations of all links that are included in the analysis
- Consultant shall provide all model input files and traffic processing spreadsheets to ODOT for review prior to starting modeling.

Economics

Consultant shall prepare an Economics Technical Report that addresses the existing economic conditions, Project impacts and benefits on the local and regional economy, and potential measures to avoid, minimize, or mitigate potential negative impacts.

The report must identify and describe the following existing conditions in the study area, and provide comparisons between the study area, region, and state where applicable:

- Businesses (including freight), business districts, or clusters of businesses with a focus on those that may be most sensitive to changes in traffic patterns or other potential effects of the proposed tolling project
- Economic trends such as total at-place employment and employment by industry sector
- Households by income, including low-income households that may be most sensitive to or impacted by the addition of tolling to help inform the Environmental Justice analysis
- Property values and tax base

This report must estimate the benefits and impacts of the Project alternatives on businesses and business districts due to traffic changes, changes in access, and changes in business clustering. The report must quantify the positive and negative impacts of each alternative on the local, regional, and state economies including short-term direct, indirect, and induced economic impacts resulting from construction spending using ODOT's Long Range Planning Unit regional job impacts multipliers and construction dollar conversion table, and longer-term, indirect economic impacts from toll collections and use of toll revenue in the region. The report must include an estimate of the net economic benefits stemming from reduced congestion and resulting travel times for vehicles and freight, and other quantifiable benefits such as reduced emissions and reductions in accidents (benefits typically monetized in a transportation benefit-cost analysis ("BCA")). The report must show the overall change in household vehicle operation costs in the region, the resulting change in travel costs as a percentage of household income, and the resulting overall share of regional jobs accessible within a 30-minute drive. The report must evaluate the potential economic impacts from relocation or new development that could result from the Project, overall changes in economic activity, and resulting changes to the tax base or tax revenue at the state and local level.

The report must identify avoidance, minimization, or mitigation measures to address direct and indirect impacts on businesses and business districts and the local, regional, and state economy.

Energy and Greenhouse Gases

Consultant shall prepare an Energy and Greenhouse Gases Technical Report that addresses the existing conditions, Project impacts, and consistency with state emissions reduction goals. Project impacts will address greenhouse gas ("GHG") emission and energy consumption with and without the proposed Project.

The report must include a summary of energy consumption and GHG emissions trends in the state of Oregon.

Energy consumption from construction and maintenance activities must be estimated using FHWA's Infrastructure Carbon Estimator ("ICE"). For any activities not included in the tool estimates, ODOT will be consulted for an appropriate alternative methodology.

Project emissions and energy consumption from Project operation must be calculated quantitatively and compared across all alternatives (including No Build and up to 2 Build alternatives) for existing conditions, 2027, and 2045. Calculations must be performed using EPA's MOVES3.0.1, consistent with the MSAT calculations for the air quality analysis. Consultant shall summarize the methodology, traffic inputs, MOVES inputs, modeling results and conclusions in the Energy and Greenhouse Gas Technical Report.

Environmental Justice

Consultant shall evaluate the direct and indirect impacts of the Project on low-income populations and minority populations per Executive Order 12898 Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations (February 1994), US Department of Transportation Updated Environmental Justice Order 5610.2(a) (May 2012), Federal Highway Administration Order 6640.23A Actions to Address Environmental

Justice in Minority Populations and Low-Income Populations (June 2012) and FHWA Guidance on Environmental Justice and NEPA (December 16, 2011). This task must provide an update to the Environmental Justice Technical Memorandum prepared for the I-205: Stafford Road to OR 213 DCE.

Consultant shall identify low-income populations and minority populations using census data, other available government data (such as public school data) and any relevant survey data collected in other tasks.

Consultant shall identify any disproportionately high and adverse impacts to low-income populations and minority populations, and propose mitigation strategies to avoid, reduce or mitigate for them. Consultant shall discuss accessibility to and use of the electronic tolling system to confirm low-income and minority populations do not experience barriers to using it.

Consultant shall incorporate findings from environmental justice populations prepared in outreach summaries, including the Project's proactive efforts to ensure meaningful opportunities for public participation including activities to increase low-income and minority participation, include the views of the affected population(s) about the Project and any proposed mitigation strategies, describe what steps are being taken to resolve any controversy that exists and document how the project team has engaged minority or low-income populations in the decision-making process related to the alternative selection, impact analysis and mitigation.

Noise

Consultant shall use information collected and presented in the Noise Technical Report for the I-205 DCE to prepare the Noise Technical Report for this noise study. Consultant shall review permitted land use, but no additional field measurements will be conducted. No changes to existing conditions or future no build modeling will be conducted if design years are consistent with the previous analysis. Consultant shall update previous future conditions modeling to include the Project design and traffic volumes for impact and abatement analyses in the Noise Technical Report. Consultant shall use the most recent version of the FHWA Traffic Noise Model (currently TNM 2.5) with the locations used during previously conducted field measurements as receiver locations and the traffic counted at time of measurement as inputs to the model. Consultant shall use the worst-case noise condition (either Peak Hour or Peak Truck Hour) for all modeled scenarios to arrive at the worst-case traffic noise condition.

The Project is identified as a Type III federal-aid project that does not meet the classification of a Type I or Type II project. As such, all impacts associated with the Project must be identified; however, noise abatement measures will not be considered in the noise study. Noise abatement measures at impact locations identified in the noise study must be considered in the next NEPA action.

Consultant shall prepare a draft, revised draft, and final Noise Technical Report for review by ODOT and FHWA to adequately and accurately detail the findings of the noise study investigation, traffic noise analysis, and proposed noise mitigation efforts. The required documentation contained in the Noise Technical Report is found in 23 C.F.R. § 772 and the

ODOT Noise Manual. A comment resolution meeting must be facilitated by the Consultant with the Agency.

The Noise Technical Report must incorporate all elements required in the ODOT Noise Manual and results of the analysis activities in this task including, but not limited to:

- Measured traffic noise level as well as a correlation to the modeled results for each of the noise measurement sites must be incorporated from the previous I-205 NTR.
- Predicted Existing, No-Build Future and Future Build noise conditions for each alternative under study.
- Identification and discussion of any developed land use that is planned for displacement as a result of Project construction and a summary of the net effect on the number of traffic noise impacts through their removal.
- Table comparing the number of traffic noise impacts for each alternative.
- Summary of noise mitigation consideration or, if needed, the detailed noise mitigation analysis conducted for each noise impacted receiver or group of receptors.
- Discussion of unavoidable impacts.
- Discussion of noise compatible planning concepts and design year noise levels and distances to NAAC criteria or NAAC contours for undeveloped land.

Social Resources and Communities

Consultant shall evaluate the impacts of the Project on social resources and communities.

Consultant shall prepare a profile of the study area summarizing population characteristics (population growth, households, disability, no vehicle households, age (senior, children), limited English proficiency, and community health). Consultant shall coordinate closely with EJ task lead and Agency and Consultant staff leading equity efforts to confirm that this report analyzes impacts and benefits to underserved populations (as identified in the Equity Framework) beyond the analysis for low-income and minority populations covered in the Environmental Justice Technical Report at the same scale (study area) and rigor. Consultant shall identify and map important social resources (e.g. churches, hospitals, schools, social service providers, and public services), business districts and large employment areas, and parks and recreational facilities; this effort must be informed through information gathered at public involvement events.

Consultant shall analyze impacts and benefits of the Project on community cohesion, character and health (air quality, noise and bicycle and pedestrian safety), the study area's demographic profile, transportation mobility and access to opportunity and affordability. Consultant shall incorporate references to documents related to Communications and Stakeholder Coordination to confirm vulnerable populations (seniors, disabled, limited English proficient) have the opportunity for full participation in Project decision-making. Consultant shall develop mitigation strategies for adverse impacts to social resources and communities. A comment resolution meeting must be facilitated by the Consultant with the Agency.

Visual Quality

Consultant shall prepare a Visual Quality Technical Memorandum to assess the potential for changes in visual quality as a result of installation of tolling infrastructure or changing traffic patterns due to tolling. In particular, the memorandum must assess whether any changes impact the segment of I-205 designated by Clackamas County as a Rural Scenic Road or the views from

existing viewpoints. An abbreviated visual impact assessment approach is assumed, per FHWA's 2015 Guidelines for the Visual Impact Assessment of Highway projects. No visual simulations will be prepared as project improvements associated with the I-205: Stafford Road to OR 213 have already been assessed in the approved DCE for that Project.

Cumulative Impacts

Consultant shall prepare a Cumulative Impacts Technical Report following the eight-step process identified in ODOT's EIS Template. The report must include a more in-depth analysis for resources with greater potential to contribute to cumulative impacts as determined by ODOT and FHWA in consultation with Consultant. Other resources with minimal or no direct or indirect impacts are not anticipated to contribute to cumulative impacts and therefore will only be briefly addressed in this report.

Consultant shall identify a cumulative impacts study area and shall identify and map a list of current and reasonably foreseeable actions within that study area. The list of current and reasonably foreseeable actions must be drawn from adopted plan documents, development proposals, and coordination with local agencies and other project teams (e.g. the Interstate Bridge Replacement Program) and must be confirmed with ODOT and FHWA. Consultant shall assess the cumulative impact of Project direct and indirect impacts in combination with past, present, and reasonably foreseeable actions for environmental resources.

I-205 Draft EA

Consultant shall prepare a draft EA in compliance with ODOT and FHWA guidance. The technical work prepared by Consultant and ODOT will serve as the technical basis for the draft EA and must be attached as appendices or incorporated as sections of the Draft EA document. The Draft EA must focus on the evaluation of tolling impacts for the I-205 seismic retrofit and widening project and must incorporate all construction-related impacts from the approved DCE by reference.

The Draft EA must include a notice on the cover sheet of the intent to prepare a combined Final EA/Finding of No Significant Impact ("FONSI").

For resources anticipated to have minimal/no additional impacts beyond what was previously documented in the I-205: Stafford Road to OR 213 DCE, as determined by ODOT and FHWA in consultation with Consultant, Consultant shall prepare updated technical analyses as part of the Affected Environment, Environmental Consequences, and Avoidance, Minimization, or Mitigation Measures Chapter of draft EA draft #1. These sections of the DE Draft EA IS must analyze the potential tolling, direct, and indirect impacts of up to 3 Project alternatives, including the No Build Alternative, and must identify potential mitigation measures. Resources to follow this approach (to be confirmed by ODOT and FHWA) include:

- Geology and Soils
- Hazardous Materials
- Historic and Archaeological Resources
- Land Use
- Parks and Recreation/Section 4(f) and Section 6(f)
- Utilities

- Vegetation, Wildlife, and Aquatic Species
- Wetlands and Water Resources

Consultant shall prepare the following sections of draft EA draft #1 including, but not limited to:

- Executive Summary
- Purpose and Need for the Proposed Action
- Alternatives
- Affected Environment, Environmental Consequences, and Avoidance, Minimization, and/or Mitigation Measures
- Cumulative Impacts
- Relationship Between Local Short Term Uses of the Human Environment and the Maintenance and Enhancement of Long-Term Productivity
- Irreversible and Irrecoverable Commitment of Resources
- Comments and Coordination
- Additional front and back materials (Cover, Table of Contents, Acronyms, List of Preparers, Distribution List, Glossary, Index)

Land use analysis must include an assessment of consistency with state, regional, and local policies and plans to be documented in a matrix format in a memorandum that can be included as an appendix to the draft EA if desired by ODOT.

Consultant shall provide consultation and support to ODOT in Endangered Species Act, Section 106, and Section 4(f), as requested by ODOT. If additional Section 4(f) documentation is required it would be prepared under s contingency.

After signatures are obtained by ODOT, Consultant shall incorporate the signature page to produce final draft EA for public distribution. Consultant shall deliver up to 50 printed copies, as determined by Agency of the final draft EA in addition to pdf files of the final draft EA for distribution and posting on the Project website.

Consultant shall prepare a draft, revised draft, and final Notice of Availability to be reviewed by ODOT and FHWA. The Notice of Availability must include the date(s), time(s), and location(s) of the public hearing and the dates of the draft EA public comment period. ODOT will submit the final Notice of Availability to FHWA for publication in the Federal Register and will submit the Notice of Availability to local newspapers for publication. ODOT will pay any fees associated with publication of the notice.

Consultant shall prepare a draft and final draft EA distribution letter to be reviewed by ODOT. The distribution letter must include the date(s), time(s), and location(s) of the public hearing and the dates of the draft EA public comment period. ODOT will be responsible for distribution of the draft EA.

One round of open houses and an online open house must be held during the draft EA public comment period by Consultant; the in-person open houses must serve as the draft EA Public Hearing(s) and must provide an opportunity for formal public testimony or submit written comments on the draft EA.

I-205 Final EA/FONSI

Consultant shall prepare a combined final EA (revised EA) and Finding of No Significant Impact (FONSI). It is assumed that a combined final EA/FONSI can be prepared for the Project. The final EA must be prepared in response to comments on the draft EA. Consultant shall maximize the use of existing documentation prepared for the draft EA, and either adopt or incorporate that data by reference to the extent possible. Technical reports and memos and the Response to Comments must be included as appendices to the final EA. No new alternatives must be analyzed in the final EA/FONSI.

The FONSI must include a description of the decision, selected alternative, alternatives considered, criteria used to determine the selected alternative, proposed project funding, Section 4(f) finding, and mitigation commitments.

I-205 NEPA EA Administrative Record

Consultant shall assemble an Administrative Record that documents the process and materials leading to a NEPA decision. It must include an index and may contain materials such as maps, calculations, meeting notes, documentation of Project decisions, public comments, public notice affidavits, final technical reports, the draft EA, final EA, and FONSI.

The administrative record is not intended to be an exhaustive catalog of all Project documents; it will consist of only those documents that were used in making the NEPA decision. All documents must be in electronic format; no hard copy documents will be included.