



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

Metro Policy Advisory Committee (MPAC)

agenda

Wednesday, July 27, 2022

5:00 PM

<https://zoom.us/j/95889916633> (Webinar

ID: 958 8991 6633)

1. Call To Order, Declaration of a Quorum & Introductions (5:00 PM)

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2. Public Communication on Agenda Items (5:05 PM)

Public comment may be submitted in writing and will also be heard by electronic communication (videoconference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00 pm on Tuesday, July 26 will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to legislativecoordinator@oregonmetro.gov. Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3. Council Update (5:10 PM)

4. Committee Member Communication (5:15 PM)

5. Consent Agenda (5:20 PM)

5.1 Consideration of the June 22, 2022 MPAC Meeting Minutes

[COM](#)

[22-0588](#)

Attachments: [6.22.2022 MPAC Minutes](#)

6. Information/Discussion Items (5:25 PM)

- 6.1 Factors of Homelessness: Understanding factors that lead someone to lose housing and prevention strategies (5:25 PM) [COM](#)
[22-0585](#)

Presenter(s): Patricia Rojas (she/her), Metro
Yesenia Delgado, Multnomah County
Stephanie Simmons, Multnomah County
Sahaan McKelvey, Self Enhancement, Inc.

Attachments: [Worksheet](#)

- 6.2 Regional Transportation Plan (RTP) - Congestion Pricing Policy Development for 2023 RTP and Oregon Highway Plan Tolling Policy Amendment and Low Income Toll Report (6:15 PM) [COM](#)
[22-0586](#)

Presenter(s): Alex Oreschak (he/him), Metro
Garet Prior (he/him), ODOT
Amanda Pietz, ODOT

Attachments: [Worksheet](#)
[RTP Congestion Pricing Memo](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)

7. Adjourn (7:00 PM)

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។

បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច្រើនការ) ប្រាំពីរថ្ងៃ ថ្ងៃច្រើនការ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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2022 MPAC Work Program

As of 7/7/2022

Items in italics are tentative

<p><u>July 27, 2022</u></p> <ul style="list-style-type: none"> • Homeless Prevention: Understanding factors that lead someone to lose housing and prevention strategies • RTP - Congestion Pricing Policy Development for 2023 RTP (Alex Oreschak (he/him), Metro; 45 min) <p><i>Q3 SHS report included in packet</i></p>	<p><u>August 24, 2022</u></p> <ul style="list-style-type: none"> • <i>Introduction to the High Capacity Transit Strategy Update for the 2023 RTP (Margi Bradway (she/her), Metro, Ally Holmqvist (she/her), Metro; 30 min)</i>
<p><u>September 28, 2022</u></p> <ul style="list-style-type: none"> • <i>TOD Program Strategic and Work Plan Update (Andrea Pastor, Metro)</i> • <i>Revisiting shelter siting: Members share opportunities for siting shelter in their jurisdictions</i> • <i>RTP - High Capacity Transit Strategy Update for 2023 RTP (Ally Holmqvist, Metro)</i> 	<p><u>October 26, 2022</u></p> <ul style="list-style-type: none"> • <i>RTP - Climate Smart Strategy Update and Climate Analysis for 2023 RTP (Kim Ellis, Metro)</i> • <i>Discussion on one-time State funding for addressing homelessness</i> • <i>Shelter siting update: members report out on potential shelter sites</i>
<p><u>November 09, 2022</u></p> <ul style="list-style-type: none"> • <i>Factors of Homelessness: Regional Cooperation</i> • Freight Commodity Study (Tim Collins, Metro) 	<p><u>December 14, 2022</u></p> <ul style="list-style-type: none"> • <i>Factors of Homelessness: Summary/Memo/ Lessons Learned</i>

Note: Some 2023 RTP topics are placeholders pending approval of the work plan and engagement plan by JPACT and the Metro Council.

5.1 Consideration of the June 22, 2022 MPAC minutes

Consent Agenda

Metro Policy Advisory Committee
Wednesday, June 22, 2022



METRO POLICY ADVISORY COMMITTEE (MPAC)

Meeting Minutes

June 22, 2022

MEMBERS PRESENT

Joe Buck (Chair)

Mark Shull

Vince Jones-Dixon

Denyse McGriff

Pam Treece

Gordon Hovies

Kirstin Green

Gerritt Rosenthal

Mary Nolan

Christine Lewis

Peter Truax

Nadia Hasan

Steve Callaway

Mark Watson

Brett Sherman

Luis Nava

Elizabeth Kennedy-Wong

AFFILIATION

City of Lake Oswego, Largest City in Clackamas County

Clackamas County

City of Gresham, Second Largest City in Multnomah County

City of Oregon City, Second Largest City in Clackamas County

Washington County

Tualatin Valley Fire & Rescue, Special Districts in Washington County

Oregon Department of Land Conservation and Development

Metro Council

Metro Council

Metro Council

City of Forest Grove, Other Cities in Washington County

City of Beaverton, Second Largest City in Washington County

City of Hillsboro, Largest City in Washington County

Hillsboro School District Board of Directors, Governing Body of a School District

City of Happy Valley, Other Cities in Clackamas County

Citizen of Washington County

Port of Portland

MEMBERS EXCUSED

Ted Wheeler

Brian Cooper

James Fage

Temple Lentz

Brian Hodson

Shusheela Jayapal

Carmen Rubio

Terri Preeg Riggsby

Ed Gronke

Diana Perez

Omar Qutub

Thomas Kim

AFFILIATION

City of Portland

City of Fairview, Other Cities in Multnomah County

City of North Plains, City in Washington County outside UGB

Clark County

City of Canby, City in Clackamas County outside UGB

Multnomah County

City of Portland

Special Districts in Multnomah County

Citizen of Clackamas County

City of Vancouver

Citizen of Multnomah County

TriMet

ALTERNATES PRESENT
Elizabeth Amira Streeter

AFFILIATION
Citizen of Multnomah County

OTHERS PRESENT: Katie Savares, Carol Chesarek, Carol Johnson, Chris Deffebach, Felicita Moneblanco, Jamie Lorenzini, Jamie Stasny, Katherine Kelly, Katy Gavares, Laura Kelly, Leah Navarro, Peter Swinton, Rachel Verdick, Schuyler Warren

STAFF: Andy Shaw, Connor Ayers, Eliot Rose, Elissa Gertler, Jaye Cromwell, Jon Blasher, Mychal Tetteh, Ramona Perrault, Roger Alfred, Stellan Roberts.

1. CALL TO ORDER, INTRODUCTIONS, CHAIR COMMUNICATIONS

MPAC Chair Joe Buck (he/him) called the virtual Zoom meeting to order at 5:00 PM.

Metro Staff Connor Ayers (he/him) called the role. Chair Buck declared a quorum.

2. PUBLIC COMMUNICATION ON AGENDA ITEMS

Felicita Montebalanco (she/her) with Tualatin Hills Park and Recreation District (THPRD) voiced THPRD's enthusiastic support for the renewal of Metro's local option levy and highlighted the importance of levy operating dollars to THPRD.

Katie Gavares (they/them) with the Intertwine Alliance provided testimony. They described the work of the Intertwine Alliance, voiced their support for the renewal of Metro's local option levy and highlighted the importance of the levy.

3. COUNCIL UPDATE

Councilor Gerritt Rosenthal (he/him) announced that Chehalem Ridge Nature Park officially opened last Friday, the groundbreaking for the Wishcamper Development affordable housing project, and the ground opening for the Viewfinder affordable housing project. Councilor Rosenthal then provided information on the Expo Development Opportunity Study (DOS) and the Climate and Transportation expert panel that was hosted by Metro.

Councilor Christine Lewis (she/her) announced that Metro planning director, Elissa Gertler, is leaving Metro on July 1.

In the chat MPAC members congratulated and thanked Elissa.

Councilor Gerritt Rosenthal updated MPAC on Tigard's mid-cycle Urban Growth Boundary (UGB) expansion request.

4. COMMITTEE MEMBER COMMUNICATIONS

Mark Watson (he/him) announced that he is looking to find a new person to serve as the school district representative for MPAC.

Mayor Steve Callaway (he/him) highlighted that it would be good to have a school district representative from Clackamas County as there have recently been one from Multnomah and Washington Counties.

Chair Buck announced that MPAC is tentatively planning to hold a meeting on August 25 at 5PM and that Metro parks staff is planning to host a tour of the Orenco Woods Nature Park on Wednesday, July 6. He also noted that Lake Oswego is moving forward with what will be the city's first Metro Bond affordable housing project.

5. CONSTENT AGENDA

MOTION: Councilor Nadia Hasan (she/her) moved to approve the consent agenda. Mayor Callaway seconded.

ACTION: With all in favor, the consent agenda passed.

6. ACTION ITEMS

6.1 Parks and Nature Bond and Levy Update

Chair Buck introduced Jon Blasher (he/him), Metro and Mychal Tetteh (he/him), Metro to present to MPAC.

Key elements of the presentation included:

Jon described Metro Parks and Nature's role in the region, some the work that Metro's Parks and Nature department has done in the region, bond progress, and the parks and nature levy. Jon explained that the levy allows Metro to operate and maintain Metro sites purchased by the bond measure. The levy funding goes towards: safe and welcoming spaces, building climate resilience through habitat restoration, regional conservation projects, and community led nature projects.

Mychal described the community, partner, and staff guidance for the levy renewal as continuity, adaptability and accountability. Mychal explained what the levy renewal needs, the process and next steps.

Member discussion included:

Mayor Peter Truax asked about the process of getting public official endorsement and what advocacy they can do for the item.

Councilor Lewis responded to Mayor Truax by describing that they are pre-referral and Metro Councilors will be used as a campaign referral.

Councilor Sherman asked if this would be on the November ballot or may of next year. He also described interest in a partnership between Happy Valley's parks district and offered assistance from his Happy Valley Hikers group.

Jon explained that they are preparing a package for Metro Council to consider for the November ballot.

Chair Buck asked what percent of the parks budget the levy makes up.

Jon responded by stating that 75% of Metro park's operating funds comes from the levy.

Councilor Vince Jones-Dixon (he/him) thanked the parks team for focusing on access to parks and greenspaces and voiced the city of Gresham's strong support for the levy.

Councilor Hasan thanked staff for the presentation and expressed her support for the levy.

Commissioner Denyse McGriff (she/her) described her full support of the levy.

Commissioner Pam Treece (she/her) voiced her support for the levy and the equity focus of the most recent levy.

Chair Buck voiced the importance of engagement efforts.

Councilor Rosenthal expressed appreciation for all the support for the parks program.

6.2 Emerging Transportation Trends Study Recommendations for 2023 Regional Transportation Plan (RTP)

Chair buck introduced Metro Staff Eliot Rose (he/him) to present to MPAC.

Key elements of the presentation and member discussion included:

Eliot discussed the study's purpose, timeline and focus and discussed the final draft work products. Eliot provided an overview on their corridor analysis, described the data and presented the findings of the corridor analysis. Eliot provided an overview on scenario analysis,

presented assumptions about current and future teleworking rates, transit service, vehicle miles traveled per capita and change in transit ridership then discussed findings from the scenario analysis. Eliot concluded by summarizing draft recommendations.

Member discussion included:

Councilor Sherman put the following question in the chat: “Will we be repeating the study of these data points in the future to validate the direction of the trends? Also, do we incorporate increased electric vehicle utilization in the future vehicle miles traveled reduction impacts?” and asked how to incorporate distinct factors into greenhouse gas calculations.

In the chat Eliot responded to these questions by explaining that continuing to collect arterial data is a recommendation Metro is asking you to consider from the study and highlighted that there will be more opportunities to dig into Councilor Sherman’s second question.

In the chat Councilor Hasan asked about people buying electric vehicles in the future.

Eliot responded in the chat by explaining that electric vehicles were not accounted for in the vehicle miles traveled forecast.

Commissioner McGriff described the challenges of people in outlying counties to utilize transit.

Councilor Hasan described that there are companies who have started to go back in person after this data was collected, noted the difficulty of finding an electric vehicle that is suitable for a family of five and highlighted the importance of public safety on transit.

Mayor Callaway agreed with Commissioner McGriff’s comments about the difficulties of riding public transit in outlying Metro areas and noted that he anticipates a time when congestion hits pre-pandemic levels which is when arterial traffic will pick up again.

Chair Buck asked how this arterial data and climate friendly equitable community policies may intersect.

Eliot responded to Chair Buck by explaining that a land use follow up on emerging trends is planned.

6.3 Tigard Mid-Cycle Urban Growth Boundary Exchange update

Chair Buck introduced Metro Staff Elissa Gertler (she/her) and Ted Reid to present to MPAC.

Key elements of the presentation and member discussion included:

Elissa explained the mid-cycle review process, Tigard’s expansion request, Metro’s COO

recommendation which is a Urban Growth Boundary (UGB) exchange process, described why Metro changed their approach to managing growth and the improvement in its growth management process. Elissa highlighted Metro's continued focus on land readiness for housing and job growth, described where growth is happening and the land readiness timeline.

Ted described the proposed UGB exchange, candidate for removal from the UGB, defined readiness, and highlighted proposed next steps.

Elissa acknowledged that there are many partners doing work on land readiness.

Chair Buck introduced Schulyer Warren (he/him) with the Department of Community Development in Tigard, to present to MPAC.

Schulyer provided information on Tigard's River Terrace and River Terrace 2.0, the project focus statement, the project vision, community engagement, gave an overview on the concept plan, described the three housing typologies, recommended housing policies, Tigard's 2018 Housing Options Project and affordable homeownership in Tigard.

Member discussion included:

Mayor Callaway put the following questions in the chat: "Does the property owner have to agree? Does the jurisdiction that the property selected must agree with the land being removed from their portion of the UGB? How will Metro engage with local jurisdictions in the review process?"

Roger Alfred, Metro Attorney, responded to Mayor Callaway's questions by explaining that Metro is going through serious engagement efforts and the process is still evolving as Metro Council just approved this to move forward.

Councilor Hasan asked the following question in the chat: "I know there was a Gurudwara in that area and was curious what's happening with it".

Schulyer responded to Councilor Hasan's question by explaining that a member from that community was on the advisory committee and will stay involved in the engagement process.

Chair Buck read Mayor Callaway's question from the chat asking if River Terrace 2.0 will be subject to the new Climate-Friendly and Equitable Communities rules being approved in July.

Kirsten Green (she/her) explained that she assumes that these rules would apply to this community.

7. **ADJOURN**

Chair Buck adjourned the meeting at 7:00 PM.

Respectfully Submitted,

Stellan Roberts

Stellan Roberts
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JUNE 22, 2022

ITEM	DOCUMENT TYPE	DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
6.1	Presentation	06/22/2022	Parks and Nature Bond and Levy Update Slides	06222022-01
6.2	Presentation	06/22/2022	Emerging Transportation Trends Study Recommendations for the 2023 RTP Slides	06222022-02
6.3	Presentation	06/22/2022	Tigard Mid-cycle Urban Grown Boundary Exchange update - Metro	06222022-03
6.3	Presentation	06/22/2022	Tigard Mid-cycle Urban Grown Boundary Exchange update - City of Tigard	06222022-04

**6.1 Factors of Homelessness: Understanding factors that lead someone to lose housing
and prevention strategies**

Information/Discussion Items

Metro Policy Advisory Committee
Wednesday, June 22, 2022

MPAC Worksheet

Agenda Item Title: Factors of Homelessness: Understanding factors that lead someone to lose housing and prevention strategies.

Presenters: Patricia Rojas, Housing Director, Metro; Yesenia Delgado, Supportive Housing Services Manager, Multnomah County ; Stephanie Simmons, Housing Stability Team Manager, Multnomah County; Culturally Specific Service Provider(s) TBD

Purpose/Objective

Over the course of this year, MPAC members will learn about, consider, and provide feedback on programming that addresses homelessness in the region, including the supportive housing services measure. This month's focus on homelessness prevention strategies will provide MPAC members with insight into some efforts around emergency rent assistance, especially during the COVID-19 pandemic. Members will hear directly from community based organizations and jurisdictional partners about their experience providing assistance and creating solutions to help prevent the causes of homelessness.

In future meetings, the Factors of Homelessness series will go on to address:

1. The types of economic factors that are causing Oregonians to experience homelessness and policy options that local governments should implement to address them
2. How cities of any size, with different levels of resources, can coordinate with one another, the three counties, and Metro to address homelessness

The MPAC Chair will report back to Metro Council the lessons learned, takeaways, and key pieces of feedback for consideration by regional housing partners.

Outcome

As this is our third presentation in the Factors of Homelessness series, MPAC members are becoming familiar with Metro's Supportive Housing Services program. Some members may be more or less familiar with work done to **prevent** homelessness and keep people housed. Strategies for preventing homelessness vary and are best addressed with resources that are culturally responsive to the needs of the community. MPAC members should leave the presentation with an understanding of how homelessness prevention strategies like emergency rent assistance are critical to reducing the likelihood homelessness. Members will also learn how some of our partners identified and mobilized resources quickly to deploy needed resources, as well as lessons learned in the process.

What has changed since MPAC last considered this issue/item?

The Metro Supportive Housing Services program last presented to MPAC in May 2022 when MPAC members heard the first presentation in the Factors of Homelessness series. That presentation gave a brief overview of the supportive housing services provided in the greater Portland region. Since then, the Metro Council approved the Tri-County Planning Body charter and the slate of members.

What packet material do you plan to include?

N/A; only PowerPoint

**6.2 Regional Transportation Plan (RTP) - Congestion Pricing Policy Development for
2023 RTP and Oregon Highway Plan Tolling Policy Amendment and Low Income Toll
Report**

Information/Discussion Items

Metro Policy Advisory Committee
Wednesday, June 22, 2022

MPAC Worksheet

Agenda Item Title: Regional Transportation Plan (RTP) - Congestion Pricing Policy Development for 2023 RTP

Presenters: Alex Oreschak, Senior Transportation Planner, Metro

Contact for this worksheet/presentation: Alex Oreschak, alex.oreschak@oregonmetro.gov

Purpose/Objective

To provide an update on congestion pricing policy development for the 2023 RTP update and overview of next steps, as well as an update on ODOT's Oregon Highway Plan (OHP) toll policy amendment and Low Income Toll Report.

Outcome

Provide input and comment on the proposed congestion pricing policy recommendations in the 2023 RTP update, and the OHP toll policy amendment process.

What has changed since MPAC last considered this issue/item?

In September 2021, Metro Council passed a resolution accepting the findings and recommendations in the Regional Congestion Pricing Study (RCPS) report, and directing staff to build upon existing policy in the 2018 RTP by incorporating the findings and recommendations from the study in the 2023 RTP update. That work is underway, and staff has developed proposed congestion pricing policy language to share with MPAC.

What packet material do you plan to include?

Project Memo

Attachment 1 Metro Regional Transportation Plan – Draft Congestion Pricing Policy Language July 2022

Attachment 2 Draft OHP Toll Policy Amendment June 2022 final

Attachment 3 Draft Low Income Toll Report June 2022

Date: June 13, 2022
To: Metro Policy Advisory Committee and Interested Parties
From: Alex Oreschak, Senior Transportation Planner
Subject: 2023 Regional Transportation Plan Policy Brief – Congestion Pricing Policy Development

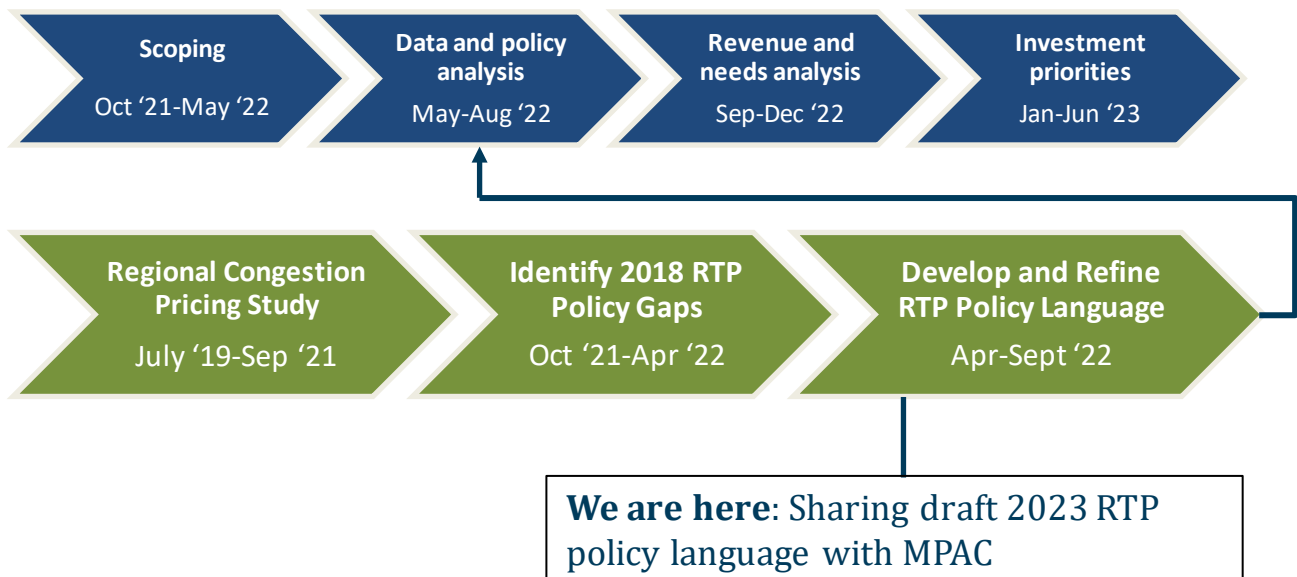
Purpose

To provide an update on congestion pricing policy development for the 2023 RTP update and overview of next steps, as well as an update on ODOT’s Oregon Highway Plan (OHP) toll policy amendment and Low Income Toll Report.

2023 RTP Draft Congestion Pricing Policy Development and Timeline

In September 2021, Metro Council passed a resolution accepting the findings and recommendations in the Regional Congestion Pricing Study (RCPS) report, and directing staff to build upon existing policy in the 2018 RTP by incorporating the findings and recommendations from the study in the 2023 RTP update. On April 20, 2022, Metro staff presented to TPAC and MTAC on congestion pricing policies in the 2018 RTP, intersections with the findings and recommendations from the RCPS, and other supportive language from both the RCPS and the Expert Review Panel that convened in April 2021. On June 3, 2022 and July 13, 2022 Metro staff presented to TPAC on draft and revised 2023 RTP congestion pricing policies. The draft language is documented in **Attachment 1: Metro Regional Transportation Plan – Draft Congestion Pricing Policy Language July 2022**.

Staff is requesting feedback from MPAC members on the draft congestion pricing policy language. This feedback will help guide refinement of the draft language for further review by TPAC and other Metro committees and for eventual inclusion in the 2023 RTP. The timing for this work is part of the data and policy analysis for the 2023 RTP update, as shown below.



2023 RTP Update Relationship to Oregon Highway Plan Tolling Policy Amendment

Concurrently with the 2023 RTP update process, the Oregon Department of Transportation’s (ODOT) Office of Urban Mobility is preparing an amendment to the Oregon Highway Plan (OHP) which would update the plan’s toll policies, which are primarily located in Goal 6 of the OHP. Amendments to the OHP

are reviewed and adopted by the Oregon Transportation Commission. No action is required from TPAC, JPACT, or Metro Council for the OHP amendment.

Metro staff and ODOT staff are coordinating on the two efforts, and have identified opportunities to comparatively evaluate policy development, including providing updates and opportunities for feedback on the OHP amendment to TPAC and other committees concurrently with updates on the 2023 RTP congestion pricing policy development.

A draft of the OHP amendment was released by ODOT on June 13, 2022, with a public comment period open through August 1, 2022. A public hearing will be held on July 20, 2022. The draft amendment is included in this packet as **Attachment 2: Draft OHP Toll Policy Amendment June 2022** and is also available at <https://www.oregon.gov/odot/Planning/Pages/Oregon-Highway-Plan-Update.aspx>.

ODOT Low Income Toll Report

As part of its effort to evaluate tolling and advance equity, the Oregon Department of Transportation (ODOT) has drafted a Low-Income Toll Report, developed in response to input from local and statewide voices. This report is just one part of ODOT's larger statewide strategy and informs the agency's approach to implement low-income toll benefits before tolling would begin, currently planned for 2024. The report shares proposed options for income eligibility, types of benefits, ways to design an inclusive program, and initiating and monitoring of a low-income toll program. The draft report is included in this packet as **Attachment 3: Draft Low Income Toll Report June 2022** and is also available at <https://www.oregon.gov/odot/tolling/Documents/Draft%20Low-Income%20Toll%20Policy%20Report.pdf>.

Feedback on the draft is requested by July 18, 2022 by emailing oregontolling@odot.oregon.gov and including "Low-Income Toll Report" in the subject line. Feedback will help further refine the options for consideration and implementation practices presented in the final report. The report is due to the Oregon Transportation Commission (OTC) and the Oregon Legislature in September 2022.

2018 RTP Background

The 2018 RTP was developed over a two-year period with extensive public and agency input and was unanimously adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council.

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

JPACT and the Metro Council also adopted policies in the 2018 RTP to expand the use of pricing strategies to manage vehicle congestion and encourage shared trips and the use of transit and, in combination with increased transit service, consider use of pricing strategies to manage congestion and raise revenue when one or more lanes are being added to throughways designated in the RTP.

Specifically, the 2018 RTP includes goals, objectives, policies and direction for future work related to congestion pricing as follows:

- [Chapter 2: Our Shared Vision and Goals for Transportation](#) – Goal 4: Reliability and Efficiency
- [Chapter 3: Transportation System Policies to Achieve our Vision](#) – Section 3.5 Regional Motor Vehicle Network Vision and Policies and Section 3.11 Transportation System Management and Operations Vision and Policies
- [Chapter 8: Moving Forward Together to Achieve Our Vision](#) – Section 8.2.3.2 Regional Congestion Pricing Technical Analysis

- [Appendix L: Federal Performance-Based Planning and Congestion Management Process Documentation](#) – Table 5 and Congestion Management Process Toolbox of Strategies

The 2018 RTP additionally included policies related to transportation demand management and system management and operations, including value pricing. Congestion pricing was also identified in the Regional Transportation System Management and Operations (TSMO) Strategy (2010) and the Regional Framework Plan (2011).

RCPS Final Report

The final report from the RCPS reflects two years of modeling, analysis, and input from technical staff, subject-matter experts and policy makers. Metro’s TPAC provided important technical input on a regular basis to shape the findings, and JPACT and the Metro Council provided policy direction and other considerations to shape the study. The report can be found at <https://www.oregonmetro.gov/regional-congestion-pricing-study>.

Below are the final report’s general recommended considerations for both policymakers and future project owners and operators, as well as specific recommendations that would apply to each group.

- Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region’s land use and transportation system.
- Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.
- Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.
- Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
 - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety) and
 - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).
- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specifically For Policy Makers

- Congestion pricing has a strong potential to help the greater Portland region meet the priorities outlined in its 2018 Regional Transportation Plan, specifically addressing congestion and mobility; climate; equity; and safety.
 - Technical analysis showed that all four types of pricing analyzed improved performance in these categories;
 - Best practices research and input from experts showed there are tools for maximizing performance and addressing unintended consequences.
- Given the importance of pricing as a tool for the region’s transportation system, policy makers should include pricing policy development and refinement as part of the next update of the Regional Transportation Plan in 2023, including consideration of other pricing programs being studied or implemented in the region.

Specifically For Future Project Owners/Operators

- The success of a specific project or program is largely based on how it is developed and implemented requiring detailed analysis, outreach, monitoring, and incorporation of best practices.
- Coordinate with other pricing programs, including analysis of cumulative impacts and consideration of shared payment technologies, to reduce user confusion and ensure success of a program.
- Conduct meaningful engagement and an extensive outreach campaign, including with those who would be most impacted by congestion pricing, to develop a project that works and will gain public and political acceptance.
- Build equity, safety, and affordability into the project definition so a holistic project that meets the need of the community is developed rather than adding “mitigations” later.
- Establish a process for ongoing monitoring of performance, in order to adjust and optimize a program once implemented.

Next Steps – Refined Congestion Pricing Policy Options

Staff will present the revised congestion pricing policy options identified in this packet at a joint Metro Council/JPACT workshop in July 2022. Staff has also requested input from TPAC on the revised policy language by July 29, 2022, and will consider feedback from TPAC, MPAC, JPACT, and Council as part of further refining the draft congestion pricing policy recommendations, and will return to present a memo outlining final proposed congestion pricing policy language to TPAC, JPACT, and Metro Council in fall 2022.

Attachments:

Attachment 1: Metro Regional Transportation Plan – Draft Congestion Pricing Policy Language July 2022
Attachment 2: OHP Toll Policy Amendment Overview
Attachment 3: Draft Low Income Toll Report June 2022

Attachment 1

Metro Regional Transportation Plan – Draft Congestion Pricing Policy Language

July 2022



Overview

Attachment 1 includes a draft outline for congestion pricing policy in the 2023 RTP, including a new section in Chapter 3 of the RTP containing six new congestion pricing policies, definitions of key pricing terms, and proposed modifications to other RTP Goals and Objectives, and Chapter 3 sections to better reflect the proposed new pricing policies.

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

This section will include an overview of congestion pricing, including an overview of pricing strategies or projects currently under consideration in the region, an overview of federal pricing programs, a brief summary of the Regional Congestion Pricing Study, descriptions of HB 2017 and HB 3055 tolling policies, potential revenue opportunities and limitations under Article IX, section 3A of the Oregon Constitution, and impacts to freight and the economy from pricing.

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Congestion Pricing Policies

- Policy 1** **Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.

- Policy 2** **Equity**: Integrate equity and affordability into pricing programs and projects from the outset.

- Policy 3** **Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.

- Policy 4** **Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.

- Policy 5** **Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.

- Policy 6** **Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

Congestion Pricing: Motorists pay directly for driving on a particular roadway or for driving or parking in a particular area. Congestion Pricing includes pricing different locations using different rate types, such as variable or dynamic pricing (higher prices under congested conditions and lower prices at less congested times and conditions), amongst other methods. Congestion pricing has been demonstrated to be effective in encouraging drivers to change their behaviors by driving at different times, driving less, or taking other modes. As a result, congestion pricing can reduce VMT and greenhouse gas emissions if there are other transportation options available or alternatives to taking the trip. Congestion pricing within the Portland metropolitan context includes the following methods and pricing strategies. Methods and strategies can be combined in different ways, such as variable cordon pricing or dynamic roadway pricing. Different types of congestion pricing can be implemented in coordination with each other to provide greater systemwide benefits. Congestion pricing can be implemented at the state, regional, or local level.

- Types of Congestion Pricing
 - Cordon
 - Parking
 - Road User Charge / VMT Fee / Mileage Based User Fee
 - Roadway
- Rate Types
 - Flat
 - Variable
 - Dynamic

Road User Charge / VMT Fee / Mileage Based User Fee: Motorists are charged for each mile driven. A road user charge is often discussed as an alternative to federal, state, and local gas taxes which have become less relevant to the user-pays principle as more drivers switch to fuel efficient or electric vehicles. Road user charges are most often implemented as flat or variable rate fees.

Cordon Pricing: Motorists are charged to enter a congested area, usually a city center or other high activity area well served with non-driving transportation options. Cordon pricing is most often implemented as flat or variable rate fees.

Parking Pricing: Drivers pay to park in certain areas. Parking pricing may include flat, variable, or dynamic fee structures. Dynamic pricing involves periodically adjusting parking fees to match demand, this can be paired with technology which helps drivers find spaces in underused and less costly areas.

Roadway Pricing: Motorists are charged to drive on a particular roadway. Roadway pricing can be implemented as a flat, variable, or dynamic fee. Roadway prices that vary by time of day can follow a set fee schedule (variable), or the fee rate can be continually adjusted based on traffic conditions (dynamic).

Flat Rate Fee (Toll): A flat rate fee, also known as a toll, charged by a toll facility operator in an amount set by the operator for the privilege of traveling on said toll facility. Tolling is a user fee system for specific infrastructure such as bridges and tunnels. Toll revenues are used for costs associated with the tolled infrastructures. This tool is used to raise funds for construction, operations, maintenance, and administration of specific infrastructure. Flat Rate Tolling can also serve as a method for congestion management, though it is not responsive to changing conditions or time of day.

Variable Rate Fee: With this type of pricing, a variable fee schedule is set so that the fee is higher during peak travel hours and lower during off-peak or shoulder hours. This encourages motorists to use the facility or drive less during less congested periods and allows traffic to flow more freely during peak times. Peak fee rates may be high enough to usually ensure that traffic flow will not break down, thus offering motorists a reliable and less congested trip in exchange for the higher peak fee. The current price is often displayed on electronic signs prior to the beginning of the priced facility.

Dynamic Rate Fee: Fee rates are continually adjusted according to traffic conditions to better achieve a free-flowing level of traffic. Under this system, fee rates increase when the priced facilities get relatively full and decrease when the priced facilities get less full. This system is more complex and less predictable than using a flat or variable rate fee structure, but its flexibility helps to better achieve the optimal traffic flow by reflecting changes in travel demand. Motorists are usually guaranteed that they will not be charged more than a pre-set maximum price under any circumstances. The current price is often displayed on electronic signs prior to the beginning of the priced facility.

Section 129: Section 129 of Title 23 of the U.S. Code provides the ability to toll Federal-aid highways in conjunction with construction, reconstruction, or other capital improvements. Flat rate tolling and variable pricing strategies are authorized for Section 129 facilities. There are some limitations to what facilities may be included. See [https://uscode.house.gov/view.xhtml?req=\(title:23%20section:129%20edition:prelim\)](https://uscode.house.gov/view.xhtml?req=(title:23%20section:129%20edition:prelim)) for more detail.

Section 166: Section 166 of Title 23 of the U.S. Code provides the ability to create high-occupancy vehicle (HOV) lanes on Federal-aid highways. Public authorities which have jurisdiction over an HOV facility have the authority to establish occupancy requirements of vehicles using the facility, but the minimum is no fewer than two. Certain exceptions are allowed such as motorcycles and bicycles, public transit vehicles, and low emission vehicles. See [https://uscode.house.gov/view.xhtml?req=\(title:23%20section:166%20edition:prelim\)](https://uscode.house.gov/view.xhtml?req=(title:23%20section:166%20edition:prelim)) for more detail.

Value Pricing Pilot Program: Oregon is a participant in the FHWA Value Pricing Pilot Program (VPPP). The VPPP was established in 1991 (as the Congestion Pricing Pilot Program) to encourage implementation and evaluation of value pricing pilot projects to manage congestion on highways through tolling and other pricing mechanisms. The program also wanted to test the impact of pricing on driver behavior, traffic volumes, transit ridership, air quality, and availability of funds for transportation programs. While the program no longer actively solicits projects, it can still provide tolling authority to State, regional or local governments to implement congestion pricing applications. See https://ops.fhwa.dot.gov/congestionpricing/value_pricing/ for more detail.

Low-carbon travel options: Low-carbon travel options include walking, rolling, biking, transit, and electric vehicles.

Transit-supportive elements: Transit-supportive elements include programs, policies, capital investments and incentives such as Travel Demand Management and physical improvements such as sidewalks, crossings, and complementary land uses.

Diversion: Diversion is the movement of automobile trips from one facility to another because of pricing implementation. All trips that change their route in response to pricing are considered diversion, regardless of length or location of the trip.

Update other RTP Goals and Objectives, and Chapter 3 sections to include congestion pricing

The following goals, objectives, and Chapter 3 sections have been identified by Metro staff and members of TPAC and MTAC. Specific changes have been identified for a subset of these goals, objectives, and sections; the remaining identified areas will be documented and shared with Metro RTP staff to update as appropriate to better reflect congestion pricing policy language in the new section in Chapter 3. Proposed changes are identified below; proposed additions are underlined and in orange text, while deletions are struck through and in red text.

- **Goal 4: Reliability and Efficiency, Objective 4.6 Pricing** – Expand the use of pricing strategies to improve reliability and efficiency and support additional development in 2040 growth areas by increasing transportation options, managing congestion, and reducing VMT consistent with regional VMT reduction targets. ~~manage vehicle congestion and encourage shared trips and use of transit.~~
- **Climate Smart Strategy policies (3.2.3.2)**
 - **Policy 5.** Use technology and congestion pricing to actively manage the transportation system and ensure that new and emerging technology affecting the region's transportation system supports shared trips and other Climate Smart Strategy policy and strategies.
- **Safety and Security Policies (3.2.1.4)**
 - **Policy 4.** Increase safety for all modes of travel for all people through the planning, design, construction, operation, pricing and maintenance of the transportation system, with a focus on reducing vehicle speeds on local roadways and minimizing diversion from priced facilities.
- **Transportation Demand Management Policies (3.11)**
 - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in transit-supportive elements and increased access to transit and

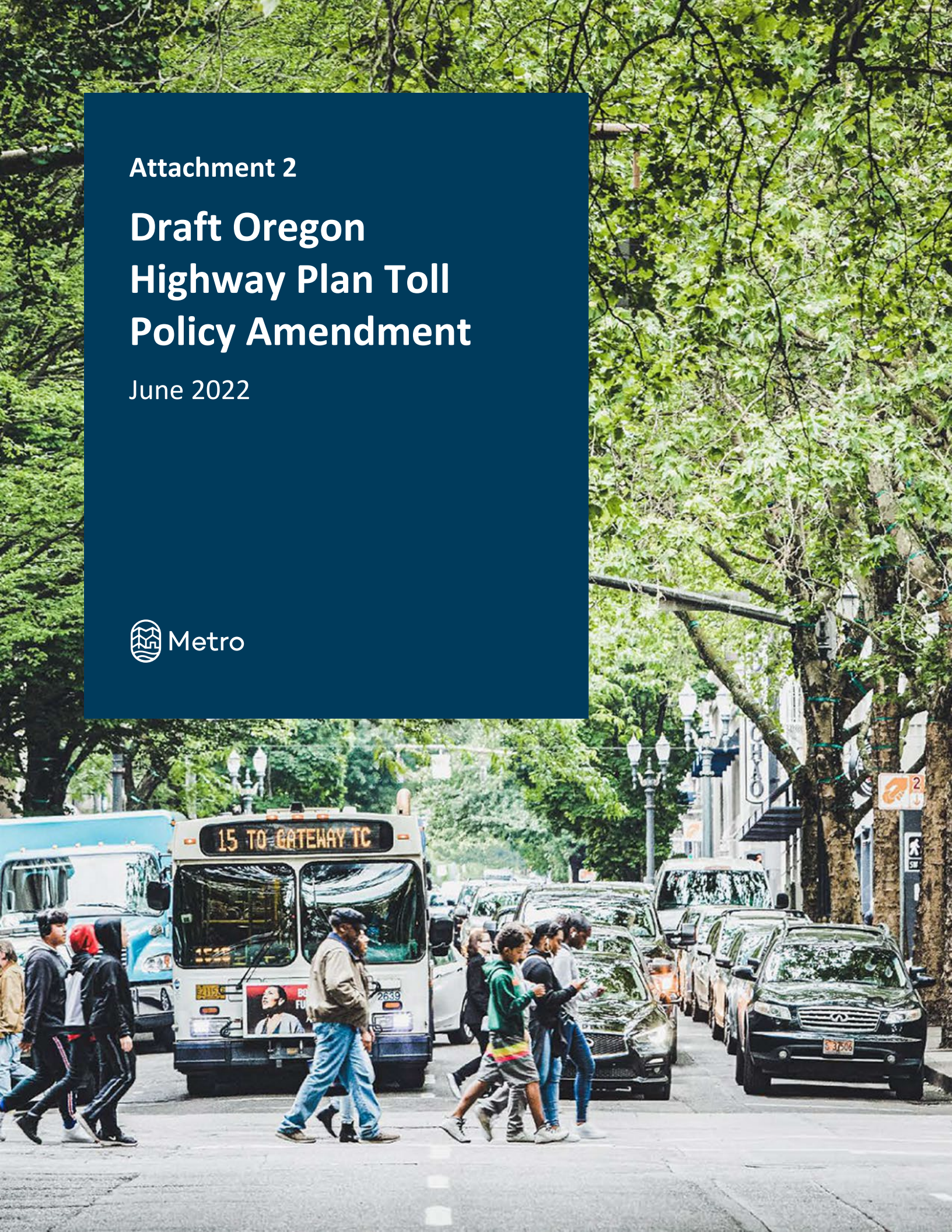
~~other modal alternatives, manage travel demand on the transportation system in combination with adequate transit service options.~~

- Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
 - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT and ~~raise revenue when one or more lanes are being added to throughways.~~
 - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies adequately ~~address arterial or throughway deficiencies and bottlenecks.~~
 - **Table 3.7 Toolbox of strategies to address congestion in the region**
 - **Congestion pricing strategies**
 - Roadway Pricing, including:
 - Peak period Variable rate or time of day pricing
 - Managed lanes
 - High occupancy toll (HOT) lanes
 - Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)
 - Parking Pricing and Management
 - Cordon Pricing

Attachment 2

Draft Oregon Highway Plan Toll Policy Amendment

June 2022



Why do we need an amendment?

The 2012 Oregon Highway Plan needs to be refreshed to frame congestion pricing and tolling policy. The purpose is to provide clarity around pricing and tolling to recognize new opportunities and support potential implementation. Policy updates are also needed to address evolving equity, climate, safety, modernization, and funding goals. Policies need to be in place to inform the rulemaking process for I-205 Toll Rate Setting which will begin in fall 2022.

Toll policies are primarily located in Goal 6 of the Oregon Highway Plan. That goal was last amended in 2012 and much has changed since then.

What is included?

This amendment will:

- Define terms and types of road pricing
- Clarify the need and goals for tolling and toll-based congestion pricing
 - The primary purpose of tolling is to help pay for infrastructure
 - The primary purpose of congestion pricing is to help manage congestion
- Incorporate connections to equity and climate goals, initiatives, and targets
- Provide guidance on rate setting and use of revenues

This amendment will not:

- Determine toll rates and revenue estimates
- Identify specific investments to be funded through toll projects

Schedule

The Oregon Transportation Commission will be the decision-makers on the policy update. They will receive a proposed amendment in September 2022. If adopted, the policy will be effective immediately.



How can you get involved?



The [Draft OHP Policy Amendment](#) is available for public review until August 1, 2022



Comments can be made via the [electronic comment form](#) or by email to: OHPManager@odot.oregon.gov



Informational webinar on June 30, 2022



Public hearing on July 20, 2022



Check the [Oregon Highway Plan Policy Amendment Webpage](#) for more information and updates.

Summary of Policies

Road Pricing Objectives

- Clarify appropriate uses for road tolls and congestion pricing and process for implementation
- Consider interconnections with other statewide goals
- Highlight supplemental options for managing demand
- Center equity throughout the process and outcomes

Rate Structures, Pricing Considerations, Exemptions and Discounts

- Set rates to achieve targeted revenue or performance outcomes
- Provide strategies to avoid imposing unfair burdens on people experiencing low-income
- Guide provision of discounts or exemptions to incentivize certain travel behaviors or address impacts

Use of Revenue

- Clarify that revenue must be used within the project corridor
- Outline revenue obligations and priorities for spending
- Address neighborhood impacts within the corridor

Infrastructure and Management

- Clarify authority of the Oregon Transportation Commission
- Provide guidance to ensure interoperability of toll systems
- Establish program assessment, monitoring, and adjustments

Comparison of Road Pricing Mechanisms

Mechanism: Types of System Pricing	Flat Rate Toll	Congestion Pricing: Variable Rate
User Experience		
One price to use	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Price changes throughout day	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Predictable price for travelers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demand Management		
Encourage shifts away from single-occupancy vehicle travel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Encourage shifts from peak travel to off-peak travel	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Traffic Operations		
Manages recurring traffic congestion (congestion pricing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Responsive to day-to-day variations and real-time conditions	<input type="checkbox"/>	<input type="checkbox"/>

= Does achieve

= Does not achieve

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

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

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如果您想了解这个项目，我们有提供简体中文翻译，请致电：503-731-4128。

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Goal 6: Tolling and Congestion Pricing

Introduction

There are many mechanisms to price the transportation system to raise revenue and/or help achieve desired outcomes. These mechanisms can be used in concert with one another when a single system is insufficient at either purpose. The focus of this section is to outline roadway pricing mechanisms to pay for specific high-cost infrastructure or to achieve congestion reduction or other outcomes along discrete sections of roadways. “Tolls” are included in this section, which refer to roadway pricing that focuses on creating revenue for the construction, and other outcome-based mechanisms targeting a desired performance on a roadway, segment, or area, such as helping to reduce congestion. These roadway pricing mechanisms are defined in this policy to help identify when use may be most appropriate and further policy direction is provided to outline how these mechanisms should be applied.

As with all transportation programs, Oregon will fulfill obligations under Federal law for the implementation of road pricing on the interstate system. Tolling and pricing have requirements and obligations that are unique to those programs and the state will ensure that all of these are met.

Types of Road Pricing

To simplify the various terms that are used for road pricing and align them with different policies, the following definitions will be used as key terms:

- 1. Flat rate toll** – A fee set by the Oregon Transportation Commission (OTC) and charged by a road pricing operator for the use of traveling on said facility. The flat rate toll rate does not change throughout the day. Revenues from this type of road pricing are used for specific infrastructure such as bridges or tunnels and other costs associated with the tolled infrastructures.
- 2. Congestion pricing** – Fee ranges are set by OTC and charged by a toll facility operator. Rates are higher during peak travel periods (such as morning and evening commute) and lower during off-peak periods. Current prices are displayed on electronic signs prior to the beginning of each priced section. With congestion pricing, motorists receive a reliable and less congested trip in exchange for the payment. Oregon will focus on scheduled variable rate congestion pricing.

Scheduled variable rate pricing, typically called “variable pricing” varies by time of day according to a published schedule, which can be updated periodically. Although rates can be different for each hour and for each day, they are known to users in advance of travel. This encourages motorists to plan travel in advance to use the roadway during less-congested periods or use a different mode and allows traffic to flow more freely during peak times.

Road Pricing Objectives

Tolling and congestion pricing are tools used to help achieve specific outcomes and can be used together.

6.1 Policy Utilize tolling, congestion pricing or a combination to achieve documented outcomes

6.1.A Action

When tolling is used to fund a specific improvement, consider adding congestion pricing if high levels of congestion exist or it is anticipated within the planning horizon.

6.1.B Action

Develop application specific objectives for tolling and congestion pricing consistent with the policies in this plan, recognizing more than one objective can be achieved but should be balanced.

6.1.C Action

Road pricing options must not conflict with, and try to support, other statewide goals around sustainability and climate, health and equity, with an emphasis on addressing the needs of historically or currently underrepresented and underserved communities.

6.1.D Action

Any road pricing options must consider the purpose and function of the facility, recognizing that the interstate and freeway system should serve longer trips and movement of people and goods to major employment and commerce locations.

6.2 Policy Utilize road tolls to help fund infrastructure improvements

6.2.A Action

Consider tolling for major investment projects on Oregon's freeways and bridges as a source for initial and sustainable funding when other funding sources are inadequate for investment needs.

6.2.B Action

Utilize flat-rate tolling to raise funds for construction, operations, maintenance and administration of specific infrastructure, recognizing that such toll may have less impacts to congestion and climate when compared to congestion pricing.

6.2.C Action

Evaluate if tolling should be used to help pay for any project that is for the construction or re-construction of a freeway or bridge and anticipated to cost more than \$100 million.

6.2.D Action

Complete a comprehensive funding plan for projects utilizing tolling to pay for improvements. Include in the plan funding sources and relative funding shares, as well as analysis of the viability of the project if tolling does not move forward. Reasons for not pursuing tolling must verify how other funding sources will be impacted if the project still moves forward.

6.2.E Action

Consider tolling to cover the short- and long-term costs of the infrastructure improvement, as is required by law and financing obligations, including: the initial capital outlay, cost of operating the tolling program, and revenue needed to cover long term maintenance, operations, and administration functions.

6.3 Policy Use congestion pricing to reduce traffic congestion

Reduce delays, stops-and-starts, and increase reliability of travel times through congestion pricing to improve overall mobility on Oregon's interstates and freeways where mobility targets are not met and the system is experiencing regular recurring congestion. The intent of congestion pricing is to change some users' behavior so that they choose a different mode of transportation, time of day, route or not to make the trip. Congestion pricing can be considered as a complimentary part of a tolling project incorporating new or upgraded infrastructure, but also can be considered as a travel demand strategy for an interstate or freeway segment without any planned infrastructure projects.

6.3.A. Action

Evaluate if congestion pricing should be used to help manage congestion for any interstate or freeway that exceeds an Annual Average Daily Traffic (AADT) to Capacity ratio (AADT/C) of 9.0 or greater or where average vehicle speeds are less than 45 mph.

6.3.B Action

Prior to adding new throughway capacity such as the addition of new through travel lanes, demonstrate that system and demand management strategies, transit service and multimodal connectivity improvements, and pricing cannot adequately address throughway deficiencies and bottlenecks.

6.3.C Action

Pair pricing with other actions to address roadway congestion holistically, including the use of ITS technology, access control and management, increasing modal options and implementing other demand management tools.

6.3.D Action

Utilize congestion pricing to have a moderate impact on reducing vehicle travel on interstates and freeways through an expected schedule (e.g. during peak hours) with the ability to manage impacts to people experiencing low-income and diversion (rerouting) and especially when there few available alternate route and mode options for real-time decisions.

6.4 Policy Connect to our climate goals and targets

Ensure that potential application of congestion pricing evaluates how it will help support state climate change goals and targets.

6.4.A Action

Recognize that implementation of any road pricing mechanism is likely to impact overall VMT and therefore should be structured to minimize diversion of freight or longer trips to local roads and encourage VMT reduction.

6.4.B Action

Evaluate implementation of road pricing as a strategy to limit or reduce future vehicular travel demand from planned land use development. Analysis should specifically look at projects that are adding significant through travel roadway capacity such as additional through lanes.

6.5 Policy Connect shifting travel to off-peak hours and to biking, walking, and public transportation to the design and operations of road pricing mechanisms

Ensure that road pricing as strategy evaluates potential shift to other travel times and modes of transportation (e.g. public transportation, carpools, biking, and walking), telecommute, or times of travel to reduce climate impacts.

6.5.A Action

Pursue congestion pricing strategies to manage demand so that the recurring congestion performance objectives are met during all hours of the day.

6.5.B Action

Upon completing toll bond obligations, consider congestion pricing strategies for ongoing reliability and demand management purposes.

6.5.C Action

While developing the tolling project and/or road pricing application, collaborate with transit agencies, local jurisdictions, and other modal groups on the following:

- Increase (or support) public transportation services, transportation option service providers, or biking and walking options for those unable to afford tolls within the project or project area
- Understand how the benefits of a better managed, less congested interstate or freeway may provide opportunities for new, expanded, or enhanced transit service
- Understand how the impacts of diversion (rerouting) of vehicle trips may impact existing or planned transit service routes

6.6 Policy Center equity when designing tolling and pricing frameworks

While the reason to price the system will not be to improve equity directly, equity must be considered and addressed in the design, execution and management of any road pricing program. Equity efforts must focus on both “process equity” and “outcome equity,” which are defined as follows:

Process equity means that the planning process, from design to post-implementation monitoring and evaluation, actively and successfully encourages the meaningful participation of individuals and groups from historically excluded and underserved communities.

Outcome equity means that the toll or roadway pricing project will acknowledge existing inequities and will strive to prevent historically excluded and underserved communities from bearing the burden of

negative effects that directly or indirectly result from the priced projects, and will further seek to improve overall transportation affordability, accessible opportunity, and community health.

6.6.A Action

Engrain equity into decision-making processes and ensure equity outcomes are achieved when developing, implementing, and managing road pricing programs, by:

- Ensure full **participation** of impacted populations and communities throughout the project and applications by identifying specific populations, groups, or geographic areas that will be used to discern for equity. The Agency must be accountable and transparent.
- Explore how road pricing application will impact overall household budgets, populations and communities and maintain **affordability**, in balance with other objectives.
- Projects will identify ways to support multi-modal access through partnerships and expand **opportunities** for historically excluded and underserved communities.
- Projects will consider the project impacts to outcomes such as community health, including air quality, noise, traffic safety, economic impacts and other potential effects on historically or currently excluded and underserved communities.

Table XX: Summary of Road Pricing Mechanisms and Associated User Impact and Goals

Mechanism	Flat rate toll	Congestion Pricing
Types of System Pricing	Flat rate toll	Variable rate
USER EXPERIENCE		
One price to use	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Price changes throughout day	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Predictable price for travelers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEMAND MANAGEMENT		
Encourage shifts away from single-occupancy vehicle travel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Encourage shifts from peak travel to off-peak travel	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TRAFFIC OPERATIONS		
Manages recurring traffic congestion (congestion pricing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Responsive to day-to-day variations and real-time conditions	<input type="checkbox"/>	<input type="checkbox"/>



- Does achieve



- Does not achieve

Rate Structures, Pricing Considerations, Exemptions and Discounts

Rate setting will be a critical step in tolling and congestion pricing processes. Specific rates are to be set in rule and the policy below provides the overarching structure for doing so.

6.7. Policy Structure rates so as not to impose unfair burdens on people experiencing low-income and to advance equity

6.7.A Action

When planning for, implementing, and managing road pricing systems including rate setting, engage the following groups for feedback and analysis:

- People experiencing low-income or economic disadvantage
- Black, indigenous and people of color (BIPOC)
- Older adults and youth
- Persons who speak non-English languages, especially those with limited English proficiency
- Persons living with a disability
- Small, minority, and woman- owned businesses
- Other populations and communities historically underrepresented by transportation projects – this shall be determined at the project-level

6.7.B Action

While setting or adjusting road pricing rates, analyze the impacts to affordability by the percentage of household income for lower- income drivers compared to middle and higher-income drivers.

6.7.C Action

Set a no- or low minimum balance requirement for loading or maintaining road pricing accounts used by the public.

6.7.D Action

Road pricing should not contribute to major financial indebtedness for people experiencing low income. Establish rate discounts, exemptions, account supplementation and/or other processes for low-income users.

6.8 Policy Set rates to help achieve desired outcomes

Structure rates to help achieve targeted revenue or performance outcomes as outlined in policy and specified by the project or desired application.

6.8.A Action

Set rates to achieve outcomes and performance targets with the understanding that outcomes will not likely be achieved through road pricing alone and additional revenue sources may supplement funding needs. Structure rates to meet the desired share from toll revenues.

6.8.B Action

Establish rates consistent with the roadway classification, purpose, and function; and the desired use of such facilities. As such:

- Discourage short trips (three miles or less) and prioritize longer-distance travel on interstates and freeways; when evaluating diversion (rerouting) to local streets, limiting these new short trips should not be a priority as compared to limiting diversion (rerouting) of freight or longer trips (three miles or more)
- Any change of 0.05 to the existing/planned V/C from diverted traffic is considered significant and mitigation may be considered
- Keep freight on interstates and freeways and off local streets, when possible.

6.8.C Action

Set rates sufficient to:

- Cover the cost of the tolling or congestion pricing system and administration as is required by law
- Reach the desired revenue needed to pay for the planned share from tolling for the infrastructure improvement, operations, and maintenance
- Manage congestion to desired travel times, speeds, or reliability thresholds established for the project
- Meet any additional system performance metrics, defined for corridors, a series of corridors or by segments.

6.8.D Action

Rate setting decisions must be based on the following considerations that include equitable rate parameters. At a minimum, rate setting should include:

- Definition of a rate range to set a minimum and maximum threshold
- Consideration of condition thresholds for when a rate range may be exceeded
- Provision of discounted or free passage to be used for certain vehicles
- Definition of the corridor for investment.

6.8.E Action

Quarterly review rates to assess goal achievement and need for additional or revised exemptions and discounts.

6.8.F Action

When rate pricing over a longer length of roadway, allow variable rates to be applied in different roadway segments by defining road pricing zones. Zones should be as long as possible and should only be divided where there is a major system connection location that significantly changes the traffic characteristics as compared to an adjacent zone. The rates are then allowed to vary between zones.

6.9 Policy Provide discounts or exemptions to incentivize certain travel behaviors or address impacts

Understand how pricing impacts users and incorporate considerations for system users while achieving pricing outcomes.

6.9.A Action

Provide exemptions for active response vehicles (police, fire, EMS/ambulatory service).

6.9.B Action

Provide an exemption to public transportation vehicles, including private coaches as required under Federal law.

6.9.C Action

Provide discounts or account supplements for people who are experiencing low income and who are struggling to meet basic needs (e.g. food, shelter, clothing).

6.9.D Action

Ensure fairness in pricing and balance low income programs with revenue needs and congestion pricing goals.

6.9.E Action

Incentivize high occupancy vehicles, such as shuttles, and carpools at the project-level or if multiple projects are operating within a region, at the regional-level.

6.9.F Action

Analyze and consider reducing toll rates when funding needs are achieved for the infrastructure improvement but ensure that toll remains to cover maintenance, operation and administration costs and that reduced rates will remain consistent with both project and statewide goals of congestion reduction.

Use of Revenue

6.10 Policy Utilize tolling or roadway pricing revenue within the project corridor

Use funds on the tolled/priced project corridor. The corridor is defined as the tolled/priced roadway and the immediate area of impact adjacent to the project, generally within 1 mile of the priced facility or as defined through the project-specific NEPA process identifying significant impacts. Additionally the corridor should be limited to arterials that generally move traffic in the same direction. If no arterial exists within, then a collector that generally moves traffic in the same direction as priced roadways may be considered. Diversion that is considered significant is when there is a substantial increase in large trucks or an increase in non-short distance trips to the local system that changes the potentially impacted facility's v/c ratio by 0.05 or more.

6.10.A Action

Ensure compliance with U.S. Code Title 23 [Section 129](#) when a toll project is approved under this section. This section requires toll revenue first go to paying for transportation improvements with capital investments to which the toll project is linked.

6.11 Policy Meet all revenue obligations first and prioritize revenue usage

When construction projects are bonded, certain financial obligations must be met before discretionary spending may occur. Net revenues after such obligations should be targeted to meet statewide goals and meet all requirements identified in Oregon's constitution, federal requirements and others as appropriate.

ORS 383.009(2)(j) states that moneys in the toll program fund may be used for improvements on the tollway, adjacent, connected and parallel highways to reduce congestion, improve safety and address impacts of diversion as a result of the tollway.

When implementing tolling as a way to help fund key infrastructure projects, revenues should be first directed toward financial obligations, construction, maintenance, and operation of the related infrastructure. A toll may be reduced once obligations are met.

Spend revenue utilizing the following hierarchy:

- Cover the cost of the tolling/pricing system and administration first as consistent with bond indenture requirements; and then
- Reach the desired share of revenue needed to pay for the infrastructure improvement, direct project mitigation, operations, and maintenance; and/or then
- For congestion pricing, discretionary spending should be targeted to manage congestion to desired travel times, speeds, or reliability thresholds established for the project; and then
- Meet any additional system performance metrics, defined for corridors, a series of corridors or by segments.

6.11.A Action

Identify corridor priorities for construction (seismic improvements, bottleneck relief projects, etc.) and operations, maintenance, administration for revenue usage.

6.11.B Action

Target net revenues for larger congestion management related projects in corridor as part of project mitigation, including enhanced transit, modal overpasses, etc.

6.11.C Action

Transit and multimodal transportation options should be increased with congestion pricing projects. This can be done through direct toll revenue allocation, when compliant with the Oregon Constitution, or through partnerships. Larger investments in transit-supportive infrastructure, such as bus-on-shoulder and park-and-rides, could be funded through a capital investments approach. Investments in carpools, vanpools, shuttles, and other demand responsive type of shifts to higher occupancy vehicles should also be considered as they may better match the needs of longer-trip users of the interstate and freeway system.

6.12 Policy Address impacts to neighborhood health and safety within the corridor (mitigation)

Acknowledge that diversion, the choice of some drivers to choose off priced system routes, may have impacts to adjacent communities and coordinate with these communities to mitigate significant impacts when feasible.

6.12.A Action

Tolling and congestion pricing projects should be planned and operated to limit longer-trip diversion (rerouting) through local communities on parallel roads.

6.12.B Action

Trips that previously used the interstate or freeway for local travel / short trips (three miles or less) should not be considered as diversion. Local trips are better served on local roads and preserve capacity on the interstates and freeways for their purpose in connecting people on longer trips.

6.12.C Action

When providing investments to address neighborhood health and safety impacts in communities because of diversion (rerouting), prioritize capital investments in biking and walking networks, consistent with constitutional restrictions.

6.12.D Action

Partner with communities when providing investments related to diversion and consider improvements to all modes.

Infrastructure and Management

6.13 Policy The Oregon Transportation Commission is Oregon's toll and roadway pricing authority

Per ORS 383.004 the OTC has been given authority over tolling and road pricing design, execution and management rules and decisions.

The OTC will implement pricing programs to raise revenue and/or manage congestion, independent of land use actions and decisions. Since pricing is a mechanism for system management, such as ramp metering, establishment of pricing rate adjustments are not to be considered land use actions.

6.14 Policy Ensure interoperability of toll rate collection systems

Design systems that are easy to use and maximize interoperability with other known systems of neighboring states, weight mile tax devices and ITS systems while maximizing options for users.

6.14.A Action

Deploy technology that facilitates interoperability with tolling systems of neighboring states whenever possible.

6.14.B Action

For any proposed tolling or congestion pricing project on an interstate or freeway, ODOT shall develop tolling systems that rely on all-electronic collection mechanisms, and enable at least one manner of toll collection that does not require a transponder.

6.14.C Action

For any proposed tolling or road pricing project on an interstate or freeway, ODOT will develop and utilize tolling technologies and systems that are based on common standards and an operating sub-system accessible by the marketplace where components performing the same function can be readily substituted or provided by multiple providers to the extent possible while compatible with tolling systems in the Washington and California whenever possible.

6.14.D Action

Provide a "cash preferred" option for paying road pricing fees in order to reduce barriers to use of the transponders.

6.15 Policy Complete program assessment, monitoring, and adjustments

Once established, evaluate tolling and congestion pricing programs regularly against project specific objectives. Along with financial obligations, this will inform any future adjustments to the rate schedule and other program design adjustments.

6.15.A Action

Establish a monitoring and reporting program, which should include: vehicle speed, volume, driver pattern changes within the corridor (e.g. diversion or rerouting), levels of congestion, modal shifts, air quality, GHG

emissions, and equity goals identified on a project-level basis. Data should capture the benefits and impacts to multimodal transportation, which includes: freight, light rail, transit, passenger vehicles (single and high-occupancy), bike, walk, and telecommute. It is acknowledged that varying levels of data exist for these modes and thus information may vary by level of detail or frequency.

6.15.B Action

The OTC will evaluate and adjust all road pricing programs on a regular basis with a minimum of annual review, with consideration to effectiveness toward goals, rate adjustments and revenue generation thresholds.

6.15.C Action

Continually assess the cumulative impact of fees and tolled/priced areas on people experiencing low income.

6.15.D Action

Actively monitor cost allocation between light and heavy vehicles as a part of the highway cost allocation and adjust as needed and ensure compliance with Oregon state constitution requirements.

Attachment 3

Draft Low Income Toll Report

June 2022



Oregon Toll Program

Draft Low-Income Toll Report: *Options to Establish Toll Benefits for Drivers Experiencing Low Incomes*

A Report to the Oregon Legislature

June 27, 2022



Draft Low-Income Toll Report

Options to Establish Toll Benefits for Drivers Experiencing Low Incomes

A Report to the Oregon Legislature

June 27, 2022

Prepared for:



Prepared by:



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Acronyms and Abbreviations

Acronym/Abbreviation	Definition
ALICE	Asset Limited, Income Constrained, Employed
BIPOC	Black, indigenous, and people of color
DMV	Oregon Driver and Motor Vehicle Services
EMAC	Equity and Mobility Advisory Committee
FPL	federal poverty level
HB	House Bill
HUD	U.S. Department of Housing and Urban Development
NEPA	National Environmental Policy Act
ODOT	Oregon Department of Transportation
ORS	Oregon Revised Statute
OTC	Oregon Transportation Commission
SFCTA	San Francisco County Transportation Authority
SNAP	Supplemental Nutrition Assistance Program
SSS	Self-Sufficiency Standard for Oregon
T&R	traffic and revenue
TANF	Temporary Assistance for Needy Families
TIMMA	Treasure Island Mobility Management Agency
TriMet	Tri-County Metropolitan Transportation District of Oregon
VDOT	Virginia Department of Transportation
VOT	value of time

1 Executive Summary

The Draft Low-Income Toll Report for the Oregon Toll Program was conducted by the Oregon Department of Transportation (ODOT) at the direction of the Oregon Legislature. The full report identifies options for consideration on the thresholds and benefits for a low-income toll rate, as well as proposed implementation practices for an equitable, inclusive toll system. The options for consideration (“options”) and proposed implementation practices are intended to start on or before day one of tolling, which is planned for the end of 2024. ODOT will finalize the report and present it to the Oregon Transportation Commission (OTC) and Oregon Legislature by September 2022, as required by House Bill 3055.

This report is a culmination of the work ODOT and the OTC have been working on for multiple years regarding how to best address the impacts of the proposed toll projects on people experiencing low incomes. In combination with the Oregon Highway Plan update and coordination and collaboration with the Oregon Toll Program’s Equity and Mobility Advisory Committee (EMAC), this report is part of a larger ODOT and OTC effort to initiate the Oregon Toll Program in a way that does not disproportionately burden, but rather benefits, people experiencing low incomes and that recognizes that past land use and transportation investments in the Portland metro area—including highway investments—have resulted in negative cultural, economic, and relational impacts on local communities and populations.

The draft report summarizes the engagement, analysis, and research conducted thus far to inform the options for consideration and implementation practices. Focused engagement with the OTC, stakeholders, and the public will occur throughout summer 2022 to further inform and refine the options for consideration and implementation practices presented in the final report.

1.1 Options for Consideration

Provide a significant discount (e.g. credits, free trips, percentage discount, or full exemption) for households equal to or below 200% Federal Poverty Level.

People experiencing low incomes have difficulty meeting basic needs such as paying for food, shelter, clothing, and healthcare. A sizable discount (e.g. credits, free trips, percentage discount, or full exemption) would alleviate the burden of choosing between paying a toll and meeting those basic needs. EMAC supports a sizable discount for households equal to or below 200% federal poverty level (FPL). Furthermore, research and stakeholder engagement shows that the 200% FPL threshold is commonly used to determine eligibility for existing low-income benefits programs in Oregon and nationally.

Provide a smaller, more focused discount (e.g. credits or free trips) for households above 201% and up to 400% of the Federal Poverty Level.

People experiencing incomes equal to and between 201% and 400% FPL still struggle to meet basic needs, despite having slightly higher incomes. Providing a more focused discount (e.g. credits or free trips) for this income group would alleviate the burden of additional transportation expenses. Furthermore, people with incomes at or below 200% of the FPL often shift income throughout the year; this benefit allows them reassurance of continued benefits despite that movement. Respondents from the May 2022 regional online survey support providing some benefit to a range of incomes, up to 300% FPL. EMAC expressed support for providing a sizeable benefit at 200% FPL and a smaller benefit at 400% FPL. EMAC also agreed that including two income ranges to meet different needs is worth the additional complexity.

Use a certification process that leverages existing programs for verification and further explore self-certification.

Qualification through existing low-income service program(s) improves the ease of enrollment for applicants and reduces the administrative burden and data privacy risk for ODOT. Self-certification would allow applicants to certify their income without substantiating documents, potentially reducing barriers to enrollment and eliminating the need for ODOT to collect or process sensitive information. However, additional research is needed to understand the potential risk -and impact of program fraud related to self-certification, and the efficacy and tradeoffs of fraud prevention strategies. EMAC strongly supports a self-certification model that streamlines the low-income toll program benefit enrollment process.

1.2 Proposed Implementation Practices

- Provide free transponders to people enrolled in the low-income program and community-based organizations or other groups helping to enroll people. Do not require a minimum dollar amount of balance to load or maintain the transponder account.
- Provide a cash-based option for paying tolls to reduce a barrier to enrollment among those who prefer to pay in cash.
- Conduct extensive marketing, promotion, and engagement with community-based organizations that begins at least 6 months before tolling starts. Post signage so that travelers can make informed decisions.
- Create an in-person and online enrollment process that accommodates participants with disabilities, who have limited technology access or training, and who speak languages other than English.
- Support a monitoring, review, and adjustment process for the low-income toll program that includes community voices and a process that is aligned with the Oregon Toll Program's Equity Framework.
- For people with income at 400% of the Federal Poverty Level and below, offer education opportunities, additional time to pay toll charges, multiple notices of account balances, or set a maximum penalty amount.
- Work with the toll implementation team to develop a concept of operations for the low-income toll program that includes a compliance waterfall.

1.3 Next Steps

Prior to the beginning of tolling, the OTC will establish a rate structure based on vehicle class, time of day, location and distance, and method and payment, and will include income-based adjustments. Additionally, more work is needed to identify the implementation and operations costs associated with the options for consideration and proposed implementation practices identified in this report. Wherever possible, the Low-Income Toll Program will leverage existing systems to streamline implementation and operations. Whatever low-income benefit is decided upon will be built into the back-office system before tolling goes live; a greater challenge will be messaging the low-income benefit to customers and forming creative strategies to reduce barriers to enrollment.

While the options presented in the Final Low-Income Toll Report will inform the income-based adjustments, further work and engagement is needed to define next steps after the report is submitted to the OTC and Oregon Legislature. Ultimately, decision-making authority lies the OTC and will occur through the rate-setting process after further robust public engagement and analysis of traffic and revenue impacts.

2 Introduction

This chapter introduces the purpose, legislative directive, and context for the draft report, in addition to previous work on addressing concerns about tolling related to people experiencing low incomes and the significant challenges and considerations for a low-income toll program. It also includes the engagement and decision-making plan for the program and the next steps for implementation.

2.1 Purpose

This draft report provides options for consideration and planned elements for the implementation of equitable, income-based tolls in Oregon. Tolling is planned to begin at the end of 2024 as part of the I-205 Toll Project. The Oregon Department of Transportation (ODOT) and Oregon Transportation Commission (OTC) will finalize this report during the summer 2022 and present the final report to the Oregon Legislature's Joint Committee on Transportation by September 15, 2022, as required by House Bill (HB) 3055.

This draft report is a culmination of ODOT and OTC's multiple years of work on best addressing the impacts of the proposed toll projects on people experiencing low incomes. The draft report summarizes the engagement, analysis, and research conducted thus far to inform the options for consideration and implementation practices. Additional engagement will further inform and refine the options for consideration and implementation practices presented in the final report.

2.2 Background

The following sections provide background on the legislative requirements directing this draft report, ODOT's Urban Mobility Strategy, and related work efforts leading up to the final report.

2.2.1 Legislative Requirements (HB 3055)

In 2021, the Oregon Legislature passed [HB 3055](#), which requires ODOT to "implement a method for establishing equitable income-based toll rates" before tolling begins. The first toll project for the Oregon Toll Program is planned to begin tolling towards the end of 2024. HB 3055 also requires that ODOT produce a report on the method for establishing equitable income-based toll rates before September 15, 2022. The legislative direction for the report is as follows:

REPORT ON EQUITABLE INCOME-BASED TOLL RATES

SECTION 162. (1) As used in this section, "toll" and "tollway" have the meanings given those terms in ORS [Oregon Revised Statute] 383.003.

(2) Before the Department of Transportation assesses a toll, the department shall implement a method for establishing equitable income-based toll rates to be paid by users of tollways.

(3) At least 90 days before the date the Oregon Transportation Commission seeks approval from the Federal Highway Administration to use the income-based toll rates developed under subsection (1) of this section, the department shall prepare and submit a report on the method developed to the Joint Committee on Transportation and the Oregon Transportation Commission. The department may also submit to the Joint Committee on Transportation any recommended legislative changes. The report

shall be provided to the Joint Committee on Transportation, in the manner provided under ORS 192.245, on or before September 15, 2022.

SECTION 163. Section 162 of this 2021 Act is repealed on January 2, 2023.

2.2.2 ODOT's Urban Mobility Strategy

ODOT's [Urban Mobility Strategy](#) aims to improve everyday travel in the Portland area through a cohesive set of projects and investments, shown in Figure 2-1. The Urban Mobility Strategy is led by the Urban Mobility Office and primarily functions to manage traffic congestion with tolling, reduce highway bottlenecks through capital construction, and invest in multimodal transportation in ways that serve ODOT's goals of addressing equity, climate change, congestion relief, and safety.

Current core projects include I-5 Rose Quarter Improvement, I-205 Improvements Project, I-205 Toll Project, Regional Mobility Pricing Project, I-5 Boone Bridge and Seismic Improvement Project, Oregon 217 Auxiliary Lanes Project, Interstate Bridge Replacement Program, and investments in transit and rolling and pedestrian paths, all of which will contribute to building a seismically resilient and modern transportation system. As a part of these core projects, tolling will be central to ODOT's long-term strategy to manage congestion and sustainably raise revenue for roadway and multimodal investments in the Portland metropolitan area.

Oregon Toll Program

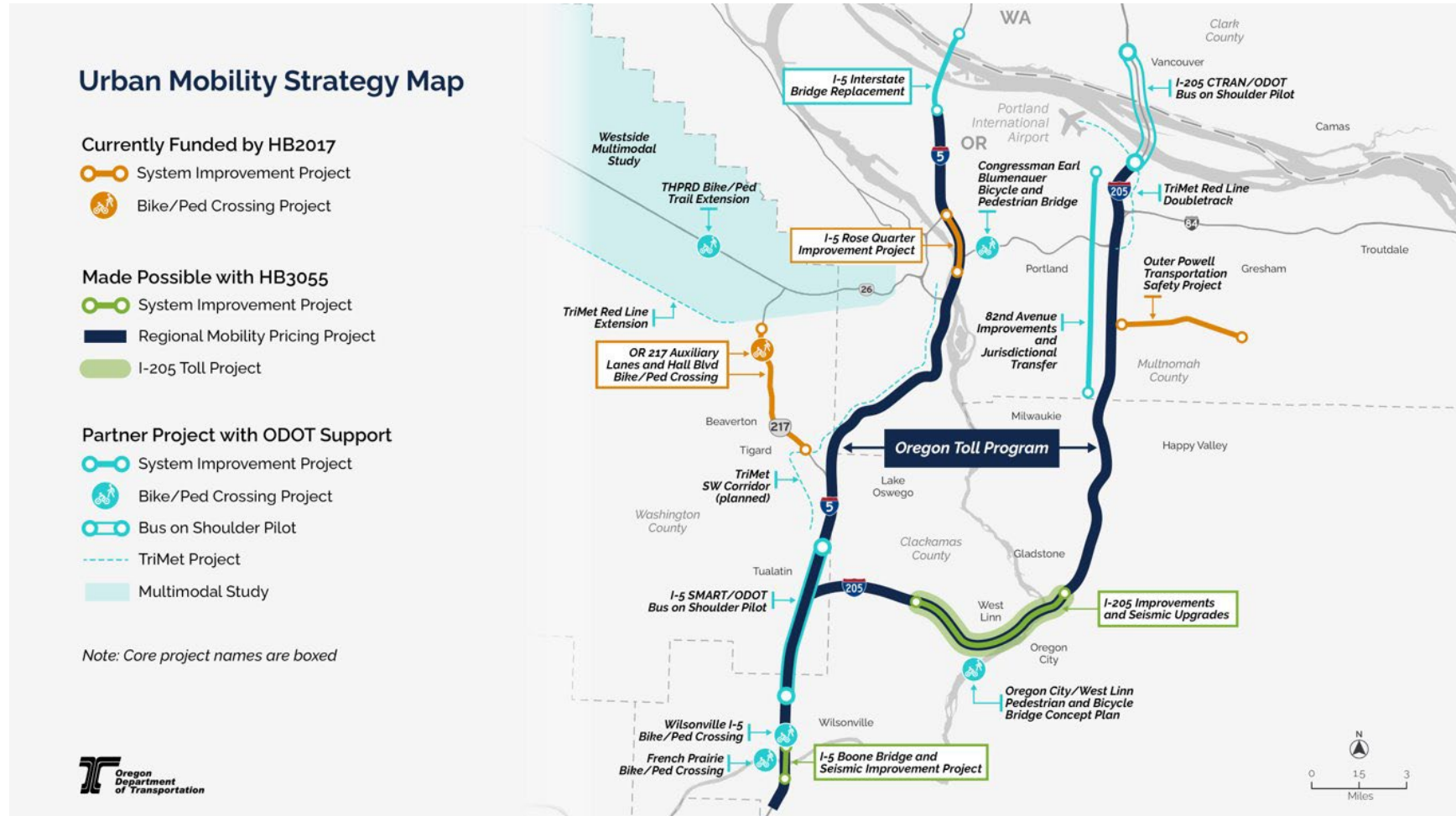
The Oregon Toll Program currently comprises two projects: the I-205 Toll Project and the Regional Mobility Pricing Project.

- [The I-205 Toll Project](#) would toll Interstate 205 (I-205) near the Abernethy and Tualatin River Bridges to raise revenue for construction of the planned I-205 Improvements Project and manage congestion between Stafford Road and Oregon Route 213 to give travelers a better and more reliable trip.
- [The Regional Mobility Pricing Project](#) would apply congestion pricing¹ on all lanes of I-5 and I-205 in the Portland metropolitan area to manage traffic congestion in a manner that will generate revenue for future transportation investments. The project area begins just south of the Columbia River and ends before the Boone Bridge over the Willamette River in Wilsonville.

While there are currently only two planned toll projects in Oregon, this report seeks to establish a broad framework that is flexible to adapt to future projects statewide yet effective and precise enough to prevent negative impacts on people experiencing low incomes when tolling begins in the Portland area.

¹ "Congestion pricing", or variable-rate tolling, describes a type of tolling that aims to improve mobility, travel times, and reliability by charging a higher price during peak traffic periods. The higher fee—typically implemented along with transit and other multimodal improvements—encourages some drivers to consider using other travel options such as carpools or transit, or to change their travel time to other, less-congested times of the day, or not to make the trip at all.

Figure 2-1. Urban Mobility Strategy Projects Map



2.2.3 Previous Work on Low-Income Tolls

ODOT and the OTC began working on how toll projects should mitigate impacts on people experiencing low incomes in 2017. Highlights of this work include the following:

- From 2017 to 2018, ODOT and the OTC convened a Policy Advisory Committee to provide input on the [Value Pricing Feasibility Analysis](#). The Policy and Advisory Committee reviewed existing research and identified the need to address cost impacts on people experiencing low incomes as a priority strategy.
- In 2020, the OTC commissioned and [chartered](#) the Equity and Mobility Advisory Committee (EMAC) to provide recommendations on how transportation needs of and benefits for people of color and people experiencing low incomes, with limited English proficiency, or experiencing a disability who live near or travel through the project area.
- From 2020 to 2021, EMAC, with support from ODOT and the OTC, conducted extensive research on case studies of other toll programs to inform a set of performance measures for ODOT to incorporate into both toll project analysis and an initial list of policy options. In late 2021, EMAC, ODOT, and the OTC agreed on a set of Foundational Statements to address equity and mobility needs for the Oregon Toll Program, which includes providing transportation options, addressing both climate and equity needs, offering toll-free travel options, creating a user-friendly program that is in place once tolling begins, ensuring that benefits extend to southwest Washington, and coordinating with regional partners. The Foundational Statements serve as one building block for the options outlined in this draft report.
- ODOT, the Joint Policy Advisory Committee on Transportation, and Metro Council have committed to supporting a list of “Commitments for ODOT and Regional Partners” (Ordinance 21-1467) and a Letter of Agreement (dated April 25, 2022) to center equity in their process and outcomes.

This draft report is also informed by ODOT’s work in equity through the Office of Social Equity and direction identified in the [Strategic Action Plan](#).

2.3 Draft Report Development and Engagement

To develop the draft report, the Project Team partnered with EMAC and engaged with the Washington State Department of Transportation (ODOT’s partner on the IBR program), social service agencies, transit and multimodal transportation providers, and statewide, local, and regional stakeholders. The Project Team also sought community input through discussion groups and an online survey. Chapter 4 details the findings of this effort and the list of stakeholders and organizations ODOT engaged with. The final report will include a full engagement summary as an appendix, including feedback received to date and results of further engagement to be conducted this in summer 2022.

2.3.1 Engagement and Decision-Making

Since tolling I-5 and I-205 in the Portland region has statewide impacts (and beyond), the Project Team strived to reach as many people as possible, conducting nine discussion groups and a community-based organization discussion with historically excluded and underserved groups, seven interviews with representatives from social service providers, and an online survey that received over 12,000 responses. To capture the robust engagement—both completed and forthcoming—the Project Team developed a three-step iterative process to develop the draft and finalize the report (Figure 2-2).

Figure 2-2. Three-Step Process for the Draft Low-Income Toll Report

Guiding Questions

The following questions were developed in coordination with EMAC and Portland regional partners to ensure that the draft report addressed the key questions we have been hearing about from the community:

- What level of income should ODOT provide a price discount from tolling?
- Should it be a partial credit, full exemption, somewhere in between, or a combination?
- How can ODOT provide toll-free travel options available to avoid further burdening people experiencing low incomes who are struggling to meet basic needs (food, shelter, clothing, healthcare)?
- Research shows that income-based toll programs are drastically under-enrolled. What are the barriers to enrollment (privacy, access, lack of information, etc.) and how can they be addressed?
- How can Oregon's tolling be a user-friendly system that is clear and easy to use by people of all backgrounds and abilities, including linguistic diversity, and by those without internet access?
- How can benefits extend across state lines?
- Research shows that income-based toll programs are drastically under-enrolled. What are the barriers to enrollment (privacy, access, lack of information, etc.) and how can they be addressed?
- How can Oregon's tolling be a user-friendly system that is clear and easy to use by people of all backgrounds and abilities, including linguistic diversity, and by those without internet access?
- How can benefits extend across state lines?
- This will be a new program for ODOT. What are issues that need to be addressed for administration and implementation on day 1 of tolling?
- How will this program be monitored and adjusted so that the low-income program provides easy access and low barrier for the customers experiencing low-income it was intended to benefit.

2.4 Key Terms and Concepts

The following section defines key terms and concepts for this draft report:

- **Income threshold:** Eligible household income for program participation (e.g., Households 0 to 100% of the federal poverty level).
- **Toll Discount:** A discount applied to the assessed toll for each trip (e.g., 50% discount on a \$3 toll would result in the driver paying \$1.50). A toll discount is applied as the trip is charged, so the driver would pay the discounted price.
- **Toll Credit:** A credit applied to a transponder account on a recurring basis (e.g., a \$25 toll credit applied to the transponder account every 6 months).
- **Free Trip(s):** A set number of free trips are applied to a transponder account on a recurring basis (e.g., 10 free trips in the tolled area per month).
- **Exemption:** Drivers are not required to pay any toll costs.
- **Income verification:** The process to determine that an applicant is within the eligible income range. This can be done through providing proof of income (such as a paystubs), through enrollment in another approved low-income benefit program (such as the Supplemental Nutrition Assistance Program [SNAP]), or through self-certification (applicant through a self-attestation form).

3 Equity and Mobility Advisory Committee Input

This chapter includes an overview of the Equity and Mobility Advisory Committee ([EMAC](#)) and its role in developing the low-income toll program, including its Foundational Statements that guide the Oregon Department of Transportation's (ODOT) work to ensure equitable mobility in the toll projects. It summarizes EMAC's recommendations on three topics: analysis of the toll projects, the low-income toll program, and operating the overall toll program. All of these recommendations are designed to center equity in the Oregon Toll Program.

To ensure both equitable Interstate 205 (I-205) and I-5 toll projects and processes, and to help develop a framework, ODOT convened an Equity and Mobility Advisory Committee. This committee is a group of individuals with professional or lived experience in equity and mobility coming together to advise the Oregon Transportation Commission and ODOT on how tolls on the I-205 and I-5 freeways, in combination with other demand management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects. Among their tasks was the development of strategies to address the transportation needs of, and benefits for, people of color and people with low incomes, limited English proficiency or disabilities that live near, or travel through, the project area.

EMAC's initial work resulted in the adoption of an [Equity Framework](#) to identify the burdens and benefits of tolling and provide a process for determining how to equitably distribute those burdens and benefits from the toll projects. The Equity Framework acknowledges how past land-use and transportation investments in the Portland metropolitan area have resulted in negative cultural, health, economic, and relational impacts on the following local communities and populations:

- People experiencing low-income or economic disadvantage
- Black, indigenous, and people of color (BIPOC)
- Older adults and children
- Persons who speak non-English languages, especially those with limited English proficiency
- Persons experiencing a disability
- Other populations and communities historically excluded and underserved by transportation projects

3.1 Informing the Low-Income Toll Program

EMAC received research about toll projects and low-income programs to inform options development. Elements of these other programs that were considered by the Committee included eligibility standards, discount or credit allocations, and geographic distribution of benefit. The resulting input and the EMAC Foundational Statements provided the basis for the options for consideration and implementation practices outlined in this draft report (see Appendix A).

ODOT began to develop this draft report while the EMAC recommendations were in draft form and refined the report to reflect the final EMAC recommendations. EMAC members have also provided feedback on online survey questions, participated in discussion groups, provided input to confirm the draft report topic areas and questions, shared reactions to preliminary findings, and expressed support for the

draft report options. The following sections define Equity Framework communities, outline the final EMAC recommendations, and summarize key EMAC feedback on an earlier draft of this report.

3.2 EMAC Advice and Feedback

Throughout 2021, ODOT supported EMAC with research documents that included a literature review, examples of toll projects throughout the United States, and feedback received from the community about how toll projects have address affordability. The following list provides links to these resources:

- [Affordability Research](#)
- [Affordability Policy and Strategy Options \(1st Round\)](#)
- [Affordability Performance Measures](#)
- [Affordability Workshop \(Video\)](#)

EMAC identified robust ideas during discussions relating to toll project analysis, the low-income toll program, and toll program. The following EMAC input is directly applicable to this draft report:

- Look beyond the standard federal definition of “low-income.” For the toll projects’ federal environmental review process (i.e., National Environmental Policy Act [NEPA]), a measure of 200% of the federal definition for poverty was assumed. This should be the baseline for future consideration. The reality is that people move below and above the federal definition for poverty in a short span of time.
- Implement an income-based toll program that is progressive in nature, meaning that higher-income drivers will pay a larger share or percentage of household income than lower-income drivers.
- In addition to drivers who are people experiencing low incomes, provide toll payment credits, exemptions, or discounts for:
 - Public transit vehicles and registered vanpools and carpools
 - Public emergency response vehicles and non-emergency medical transportation
 - Social service or nonprofit health organizations to recruit and retain volunteer drivers
- Find the right balance between discounts and/or exemptions and revenue generation to advance equity. Specifically, analyze the tradeoffs between exemptions, credits, or discounted rates based on income versus collecting the toll revenues and investing them into equity and mobility strategies. This may include an analysis of tradeoffs in the time between when I-205 tolling starts and when the regional I-5 and I-205 toll system (i.e., Regional Mobility Pricing Project) comes online.
- Equity Framework-identified communities should be involved in the analysis and decision-making process on determining what would best advance equity.
- Design and implement an interoperable and easy-to-use fare/payment system across geographic boundaries and transportation options.
- Coordinate between Oregon and Washington, as well as across bike, scooter, carpooling, car sharing options, and park-and-ride lots. Look at Rideshare Online as an example of rideshare and vanpool services that serve Oregon and Washington. Likewise, TriMet’s Hop card is an example of a system that accommodates users in Oregon and Washington.

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- Commit to offering additional time to pay a toll bill without incurring fines and study options for effectively doing so. Tolling should not contribute to more financial indebtedness for people experiencing low incomes, nor should it lead to criminal penalties.
- Follow the precedent set by ODOT's Rose Quarter Improvement Project to include a baseline for Disadvantaged Business Enterprise investment that goes beyond the federal requirement.
- Provide a cash-based option for paying tolls in order to reduce barriers to use of the tolls, including among the unbanked.
- Ensure the process of applying for exemptions, discounted rates, or credits considers varying degrees of technological competency and access. ODOT should account for internet reliability in rural areas and how that could affect access to services online (load transponders, apply for exemptions, etc.).
- Set a zero or low minimum-balance requirement for loading or maintaining transponders. Transponders should also be free or should come pre-loaded with credits to cover the cost of the purchase. The cost of a transponder can be a barrier to purchase for people experiencing low incomes.

3.3 EMAC Feedback on Draft Report Development

A sub-committee of EMAC members received information on the technical analysis and the results of public engagement related to a low-income toll policy. The members provided input and feedback on a draft of this report at two sub-committee meetings in April and May of 2022. Feedback on draft options included the following:

- Support for a sizable benefit at 200% Federal Poverty Level and a smaller benefit at 400% federal poverty level.
- Agreement that including two income eligibility levels is worth the additional complexity so that different needs can be met.
- Varied support for offering a free option. Supportive members referenced the current and historic regressive transportation funding structure as well as the extreme economic needs at the lowest of incomes. Opposing members raised concerns about the climate impacts of incentivizing driving and de-incentivizing transit, the history of free social service benefit programs, and a feeling that all users should contribute some amount.
- Strong support for a self-certification model that streamlines the low-income toll program benefit enrollment process.

EMAC is also in the process of developing and delivering a set of recommendations ([overall](#) and [July 2022 actions](#)) to the Oregon Transportation Commission in July 2022. If accepted by the Oregon Transportation Commission in July, EMAC recommended actions that connect to affordability will be updated in this document.

4 Stakeholder Engagement Results

This chapter outlines the toll projects' iterative, three-step process involving the draft report, community and stakeholder feedback, and the final report, to ensure robust engagement leading up to the September 2022 deadline. The chapter summarizes key themes from various engagement methods, including stakeholder interviews with low-income service providers, a regional public survey, and discussion groups with historically excluded and underserved groups. This feedback was central to developing the draft report's options for consideration.

The Oregon Department of Transportation (ODOT) engaged stakeholders through a variety of methods and with numerous audiences.

4.1 Stakeholder Interviews and Discussion Groups

ODOT conducted seven interviews² to gather information from social service providers and state, local, and federal programs that serve people experiencing low incomes. The purpose of the interviews was to help inform implementation practices for determining eligibility and designing an accessible, inclusive low-income toll program.

ODOT partnered with the Community Engagement Liaisons Program to conduct focused, meaningful engagement with historically excluded and underserved groups. Trusted leaders from various communities held eight discussion groups with individuals or groups who identify as a youth, people experiencing disabilities, Latin American, Russian/Slavic, Chinese, Vietnamese, Black/African American, and Black, indigenous and people of color (BIPOC). Participants were asked for their perspectives on options for the low-income toll program, preferences on enrollment and application process, and potential barriers to participating in the program.

ODOT also held a discussion group with eight representatives³ from seven community-based organizations serving Equity Framework communities. Participants were asked about potential barriers to participation in a low-income toll program and best practices for enrollment from other programs for people experiencing low incomes.

4.1.1 Key Themes

The following key themes emerged from stakeholder interviews and discussion groups:

- Address the many barriers that may exist for potential applicants (language, technology access, etc.).
- Provide many options to demonstrate eligibility for a low-income discount.
- Make the application centralized and easy to complete and track.
- Offer many application options and in multiple languages.

² Interview participants included representatives from Neighborhood House, Health Share of Oregon, Native American Youth and Family Center, TriMet, Portland Housing Bureau, Housing and Urban Development, and Oregon Housing and Community Services.

³ Community-based organization discussion group participants included representatives from Black United Fund of Oregon, Community Alliance of Tenants, East County Rising, Immigrant and Refugee Community Organization, Oregon Latino Health Coalition, Ride Connection, and Portland Community Reinvestment Initiatives.

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- Partner with low-income programs and resources for the program to be successful.
- Provide resources for staff and funding for community-based organizations and other trusted organizations such as schools and libraries to support enrollment.
- Consider other impacts on household finances in addition to income.
- Provide low-income discounts, but some concern was expressed about fairness and minimizing financial impacts on working families.
- Consider the unique needs of other user groups.
- Provide discount and credit options, but some concern was expressed about a transit credit.
- Consider more ideas for types of discounts and how toll discounts could work.
- Conduct an awareness and education campaign.
- Provide multiple options for toll payment, including cash options.
- Provide support for those who cannot make toll payments to avoid impacts from fines or penalties.

The final report will include a full engagement summary as an appendix.

4.2 Regional Online Survey

An online survey was publicly available from April 28 to May 16, 2022, and received over 12,000 responses. ODOT advertised⁴ the survey as an opportunity for the public to share feedback to shape congestion pricing and advance equity, including developing a toll discount or credit for people experiencing low incomes. The survey included two multiple-choice questions related to the draft Low-Income Toll Report, asking who should be eligible for the low-income discount or credit and the level of agreement with options for a low-income toll program. There was one open-ended response question.

A write-in question was provided at the end of the survey for respondents to share any additional feedback with decision-makers and project planners about congestion pricing. There were over 8,000 responses to this question, of those there were 146 comments related to the Low-Income Toll Report. These were comments and ideas specific to the Low-Income Toll Report and what the commenter might want addressed in the report.

4.2.1 Key Themes

ODOT tabulated survey results for all respondents and respondents who reported household annual incomes under \$50,000. Key themes related to benefits and eligibility are shown in Table 4-1. Full results will be included in an appendix of the final report.

As shown in Table 4-1, when asked about eligibility for a low-income discount or credit, many respondents (55%) preferred some type of eligibility threshold. The most common preference was an eligibility threshold of 300% federal poverty level (FPL) (36%), while 19% preferred an eligibility threshold of 200% FPL. Across nearly all demographics, there was significantly more preference for eligibility at

⁴ Activities to help invite participation in the online survey included: digital and print ads in regional and multi-cultural publications; social media posts, including ads in Spanish; website notices and newsletter updates; outreach toolkits to partners; tabling events at food pantries; presentations at various transportation meetings in the Portland region and statewide.

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300% FPL. Several groups were more likely to choose one of the presented eligibility thresholds. Among those respondents who bike/roll, walk, take transit, and people with household incomes under \$50,000, 70% opted to select one of the eligibility thresholds.

Table 4-1. Key Themes from Survey Respondents – Eligibility (N = 11,050)

Theme	All Respondents	Households under \$50,000/year
Eligibility^[1]		
Under 300% Federal Poverty Level (FPL)	36%	47%
Under 200% FPL	19%	25%
Neither	33%	20%
I don't have a preference / prefer not to answer	12%	8%

[1] Survey question: Who should be eligible for a low-income discount or credit?
FPL = federal poverty level

As shown in Table 4-2, when asked about options for a low-income toll program, all respondents and respondents from households with annual incomes under \$50,000 agreed with providing toll caps and toll credits. Only one option, free transponders with a \$25 initial credit, had net disagreement (39%) exceeding agreement (38%). Respondents experiencing low incomes agreed with all options comparatively more frequently.

Respondents experiencing low incomes and respondents that identified as living with a disability agreed with transit credits relatively less frequently. For these groups, transit credits garnered the least support compared to the other options.

Table 4-2. Key Themes from Survey Respondents – Benefit Type (N = 10,914)

Theme	All Respondents Strongly Agree or Agree	Households under \$50,000/year
Benefit Type^[1]		
Daily or monthly toll caps	45%	55%
Providing a limited number of toll credits for free or discounted toll trips	44%	53%
Transit credits	40%	41%
Free transponder plus \$25 credit	38%	48%

[1] Survey question: How much do you agree or disagree with the following options for a low-income toll program? Respondents could also select options indicating disagreement, neither agreeing or disagreeing or unknown.

In summary, the general population and households with incomes under \$50,000 most agreed with providing toll caps and toll credits. Lower-income households were more supportive of all benefit types than the general population. Both groups were more in favor of defining eligibility at the 300% FPL than at the 200% FPL, but lower-income households were more supportive of either level than the general population.

Key themes from the open-ended survey responses and project emails

General themes discussed in these comments and by direct email included observations and experiences of the need for a low-income toll program, thresholds for income eligibility and the recommended types of credits, discounts and exemptions, and ideas about income verification and certification. A full summary will be included in an appendix of the final report.

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- Many respondents indicated their concern about the impact the toll will have on people experiencing low incomes, particularly in the BIPOC communities, given income inequality, limited travel options, and the increased cost of living.
- Commenters generally supported discounts, exemptions, and credits for people experiencing low incomes, including tiered and phased credits, monthly and daily caps, and an expansion of the low-income threshold. A small number of commenters also suggested exemptions for key user groups such as students, seniors, and people with disabilities. A few felt there should be no exemptions, and that all travelers, including people experiencing low incomes, should pay at least some amount.
- Some commenters indicated their preferred thresholds or definitions for “low income.” A few mentioned that they felt the threshold for low-income eligibility should be raised. General income thresholds for exemptions, discounts, or credits discussed ranged from \$27,000 to \$80,000 per year.
- A few commenters indicated concern about the procedural burden that income verification or certification would place on people experiencing low incomes.

ODOT received two emails about discount options for people experiencing low incomes. These comments noted the following:

- Concern about the cost of administering a low-income program and the impact on taxpayers. It noted tolling programs in other states, such as Florida and New Jersey, where everyone pays the same without discounts.
- Concern that the federal poverty guidelines would be too low for senior citizens to qualify. Given this concern, the commenter recommended increasing the eligibility to \$45,000 for a married couple.

5 Sensitivity Test for Discount Options

This chapter presents the technical analyses of the potential impacts of income-based discount options on traffic volume and gross toll revenue for the I-205 Toll Project and the Regional Mobility Pricing Project. It also highlights modeling assumptions and methodologies used for this analysis, which is meant to inform—not precisely represent—the potential outcomes of one of the options for consideration.

5.1 Outcomes

This draft report considered findings from two separate sensitivity test analyses, one conducted as a part of the I-205 Toll Project and the other conducted a part of the Regional Mobility Pricing Project. Sensitivity tests are used to test different project assumptions by changing a single variable and measuring the outcomes of that change. For these analyses, the Project Team applied a 50% discount for trips made by drivers experiencing low incomes and measured daily traffic volumes on the tolled facilities (Interstate 5 [I-5] and I-205) and gross toll revenue.

The sensitivity test results are not meant to represent exact outcomes of the options in this draft report; rather, they suggest the pattern of how a low-income benefits program might affect project outcomes. The tests were performed using the Metro Regional Travel Demand Model⁵ to assess future year conditions (in 2040 or 2045). The modeling analyses involve a number of assumptions, such as 100% enrollment in the program by all who are eligible, and high-, medium-, and low-income thresholds that do not perfectly match the federal poverty level (FPL) used in the draft report options for consideration.

The model results indicate that as more users take advantage of a discount program, the more likely it is that the toll program objectives related to revenue and congestion management could be affected. The findings suggest that a limited low-income discount could slightly increase daily traffic volume on tolled facilities and slightly decrease gross toll revenue⁶ compared to baseline conditions without a discount. A more inclusive discount program (with increased eligibility at a higher income threshold) could further increase daily traffic volume and decrease gross toll revenue.

5.1.1 Key Findings: I-205 Toll Project Model Sensitivity Test

The Project Team performed model sensitivity tests for the I-205 Toll Project to support the refinement of assumptions for the I-205 Toll Project alternatives to be advanced into the Environmental Assessment. Table 5-1 shows how daily traffic volume and daily gross toll revenue may change by applying the low-income discount to the baseline project scenario. The baseline scenario is Alternative 3 from the I-205 Toll Project Comparison of Screening Alternatives Report, which includes two toll locations: The Abernethy Bridge and the Tualatin River bridges located east of Stafford Road. The changes represent the difference between application of a low-income discount and the baseline scenario, in year 2040 modeling. The estimated daily volume increase and change in gross toll revenue are totals of the two tolled segments of I-205.

⁵ Metro's Research Center collects and analyzes transportation-related information to develop and maintain modeling tools for forecasting travel flows and emissions. Travel demand models use data to predict transportation choices such as trip frequency, trip origins and destinations, types or modes of transportation, and travel by time of day.

⁶ The sum of all money generated from collecting tolls, without taking into account any portion of the revenue that will be used to cover expenses.

In summary, the 2040 model results indicate that a low-income discount could slightly increase daily traffic volume (2% from the baseline) and could slightly decrease gross toll revenue (1% from the baseline).

Table 5-1. Comparison of Discount Scenario to Base Toll Rate Scenario in 2040

Change Measurement	Low-Income Discount Toll Scenario (50% of Base Toll for Low Income)
Percent Change in Daily Traffic Volume	+2%
Percent Change in Gross Toll Revenue	-1%

5.1.2 Key Findings: Regional Mobility Pricing Project Model Sensitivity Test

The Project Team tested two low-income discount scenarios for the Regional Mobility Pricing Project. The first test applied a 50% toll discount to low-income vehicle trips, which make up about 10% to 15% of potential automobile trips on I-5 and I-205. The second test applied a 50% toll discount to the same low-income vehicle trips in addition to half of the medium-income vehicle trips, accounting for a total of 35% to 40% of potential auto trips on I-5 and I-205. Table 5-2 shows the estimated effects that each discount could have on I-5 and I-205 volumes and the gross Regional Mobility Pricing Project toll revenue, based on modeling for 2045 conditions.

Table 5-2. Comparison of Discount Scenarios Versus Congestion Pricing without Discount Applied in 2045

Change Measurement	Smaller Discount Program (50% Discount for Low-Income Trips)	Larger Discount Program (50% Discount for All Low-Income Trips Plus Half of Medium-Income Trips)
Percent Change in Daily Traffic Volume	+2%	+4%
Percent Change in Gross Toll Revenue ^[1]	<-5%	-10 – -15%

[1] The gross toll revenue impacts described in this section are based on raw model results and toll rate assumptions. They are intended for relative comparisons and do not represent net toll revenue estimates.

In summary, the smaller (less inclusive) discount program (50% discount on all low-income trips) would increase daily traffic volume by 2% from the baseline, and the larger discount program (50% discount on all low-income trips and half of medium-income trips) would increase daily traffic volume by 4% from the baseline in 2045. The smaller discount program would decrease gross toll revenue by less than 5%, and the larger discount program would decrease gross toll revenue by 10% to 15%.

5.2 Considerations for Sensitivity Tests

5.2.1 Income Threshold

As mentioned previously, the Metro Regional Travel Demand Model used to produce these results uses different income thresholds than the FPL thresholds referenced in the draft report options for consideration. Trips in this model are divided into three groups based on household income:

- Low Income: Household income under approximately \$30,000 per year (in current year dollars)
- Medium Income: Household income between approximately \$30,000 and \$125,000 per year (in current year dollars)
- High Income: Household income above approximately \$125,000 per year (in current year dollars)

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As shown in Table 5-3, the 2021 FPL thresholds are split into individual household/family size, ranging from 1 person to 14 people, rather than the entire household on average. Because the Regional Travel Demand Model does not account for household/family size associated with each vehicle trip, the outcomes reported in the Key Findings sections in Section 5.1 above cannot be directly tied to the income thresholds used in the model. However, these data provide a helpful point of reference for how income classes in the model relate to FPL.

Table 5-3. Annual Household Income Thresholds for 200% and 400% of the 2021 Federal Poverty Level

Household/Family Size	200% FPL	400% FPL
1	\$27,180	\$54,360
2	\$36,620	\$73,240
3	\$46,060	\$92,120
4	\$55,500	\$111,000
5	\$64,940	\$129,880
6	\$74,380	\$148,760
7	\$83,820	\$167,640
8	\$93,260	\$186,520
9	\$102,700	\$205,400
10	\$112,140	\$224,280
11	\$121,580	\$243,160
12	\$131,020	\$262,040
13	\$140,460	\$280,920
14	\$149,900	\$299,800

Source: U.S. Department of Health and Human Services. 2022. *HHS Poverty Guidelines for 2022*.

<https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>.

FPL = federal poverty level

5.3 Value-of-Time Considerations

Each household is assigned to an income class in the Regional Travel Demand Model, and vehicle trips generated by these households are assigned a particular willingness to pay a toll, as represented by a value-of-time (VOT) assumption. This determines how a monetary toll assumption affects travel behavior in the model. For example, a driver with a high VOT is more willing to pay a toll for the travel-time savings that the tolled facility would offer than a driver with a low VOT, even though the amount of money paid is the same for both drivers.

The current model assumptions directly tie income and VOT: low-income drivers are assigned a low VOT, and high-income drivers are assigned a high VOT. In reality, VOT distributions for each income class will overlap and vary with each individual trip, because each traveler's willingness to pay tolls for a given trip can be highly situational and not always correlated with their income level. The Project Team is currently running tests to account for more variation in VOT within each income class. However, the current assumptions still show a range of possible responses to different toll schedules and allowed the Project Team to assess the potential impacts of different policies.

6 Regional Analysis

This chapter considers income levels in the Portland region in relation to the Federal Poverty Level (FPL) and alternative ways, beyond the FPL, to determine eligibility in the region. It describes a decision-making framework and a set of metrics to evaluate different benefit options, which culminates in a table of scores that identify the best and worst benefit options based on the framework and metrics. The decision-making framework was central to developing the options for consideration presented in the draft report.

As noted in Chapter 5, the complexities of using the FPL as a benchmark introduce many considerations during the sensitivity test analyses, ranging from accounting for differences in household size when modeling to the insufficiency of using the FPL alone as a threshold for low or medium incomes in urban areas. At the same time, using a nationally recognized federal benchmark like the FPL can make a program easier to understand from the perspectives of both program operators and the public and can foster consistency with other similar programs. These complex considerations and tradeoffs warrant further examination of:

- How the FPL relates to the people living in communities surrounding Portland;
- How the FPL relates to more regionally specific income thresholds (ALICE and SSS⁷); and
- Benefit recommendations resulting from these relationships.

6.1 Income Levels by Geography

In the Portland region, about 25% of the population experiences low income at or below 200% FPL and 54% have incomes at or below 400% FPL. These percentages are lower than Oregon overall, and the proportion of people experiencing both levels of low incomes is higher in Oregon than in Washington. Table 6-1 displays the population totals and income levels by geography. The table includes percentage of the population experiencing incomes below the FPL not only as a point of comparison but to demonstrate that using the FPL alone as a threshold in the Portland area is too stringent to serve a practical purpose and to provide a widespread benefit. These statistics provide context for determining eligibility for the low-income program.

Table 6-1. Populations in the Portland Metropolitan Statistical Area, Oregon, and Washington by Share of the Federal Poverty Level

Demographic (U.S. Census Bureau Classifications)	Metropolitan Statistical Area ^[1]	Oregon	Washington
Total Population	2,412,378	4,052,019	7,266,810
100% FPL	11%	13%	11%
200% FPL	25%	31%	26%
400% FPL	54%	61%	55%

Source: U.S. Census Bureau, American Community Survey, 2015 to 2019. S1701 Poverty Status in the Past 12 Months.

[1] Metropolitan Statistical Area = Portland-Vancouver-Hillsboro, OR-WA Metro Area

⁷ ALICE is the acronym for Asset Limited, Income Constrained, Employed, and represents households with incomes above the FPL but that still don't make enough to pay for the basic cost of living. SSS is the acronym for Self-Sufficiency Standard, which is a measure of the cost for a family to make ends meet without assistance.

6.2 Eligibility for the Portland Region

Since the FPL alone has been demonstrated to be too restrictive to use as a benchmark for the program to provide widespread benefits, Equity and Mobility Advisory Committee and stakeholder feedback supported using a more inclusive income threshold than the FPL. While multiples of the FPL shown above (i.e., 200% and 400% FPL) are commonly used for similar programs, the Oregon Department of Transportation (ODOT) assessed two alternative methodology models:

- **ALICE** (Asset Limited, Income Constrained, Employed) uses a standardized set of measurements to quantify the cost of a basic household budget in each county of partner states. The *ALICE Threshold* represents the minimum income level necessary for survival for a household and is derived from the *ALICE Household Survival Budget*—the bare minimum cost of household basics including housing, childcare, food, transportation, technology, and health care, plus taxes and a contingency amount equal to 10% of the household budget. The ALICE Household Survival Budget (for Oregon in 2018) for one adult, one preschooler, and one child is \$56,523.⁸ ALICE also calculates a Household Stability Budget, which estimates the higher costs of maintaining a viable household over time, including a 10% savings category that can be used in an emergency, for additional education, or to buy a home.⁹ For 2018, the most recent data year, the ALICE is \$51,216 for a household/family size of one and \$118,896 for a household/family size of four.
- **Oregon SSS** (Self-Sufficiency Standard for Oregon) calculates how much income a family must earn to meet basic needs and is derived from the costs of housing, childcare, food, healthcare, and transportation, plus the cost of taxes and impacts of 2021 tax credits. The Oregon SSS minimum cost of living tends to be higher than the ALICE minimum cost of living. For the counties of the Portland Metropolitan Statistical Area, the Oregon SSS for one adult, one preschooler, and one school-age child is around \$60,000 to \$80,000. Table 6-2 shows for the SSS by county.

Table 6-2. Portland Metro SSS Compared to the Federal Poverty Guidelines

County	Annual SSS	As a Percentage of Federal Poverty Guidelines
Clackamas County	\$78,355.02	357%
Columbia County	\$67,966.03	309%
Multnomah County	\$79,710.87	363%
Washington County	\$78,106.52	356%
Yamhill County	\$68,352.56	311%
Clark County	\$64,600.25	294%
Skamania County	\$59,272.81	270%

Source: University of Washington. 2021. The Self-Sufficiency Standard for Oregon 2021.

<https://www.oregon.gov/workforceboard/data-and-reports/Documents/The-Self-Sufficiency-Standard-For-Oregon-2021.pdf>.

SSS = Self-Sufficiency Standard

Both the ALICE and SSS methodologies calculate standards for unique combinations of county and family composition. Table 6-3 gives a examples of the varying SSS by county and household size as a percentage of the FPL, demonstrating that meeting this standard can range from earning 221% of the FPL for a household of one in Skamania County, Washington, to earning 497% of the FPL for a household of five in Multnomah County, Oregon. Various household compositions and sizes of 6 to 20

⁸ United for Alice. <https://www.unitedforalice.org/household-budgets/oregon>.

⁹ United for Alice. <https://www.unitedforalice.org/household-budgets-mobile/oregon>

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are also calculated in the SSS but not shown below. The SSS per household size indicated below are averages taken from all household compositions per household size.

Table 6-3. Portland Metro SSS Compared to Federal Poverty Guidelines by Household Size

Family Size	1	2	3	4	5
Clackamas County	\$ 36,249.70	\$ 57,349.17	\$ 71,700.00	\$ 95,112.94	\$ 144,944.23
%FPL	281%	329%	327%	359%	467%
Columbia County	\$ 32,543.45	\$ 51,364.19	\$ 63,135.63	\$ 82,911.86	\$ 122,969.33
%FPL	253%	295%	288%	313%	396%
Multnomah County	\$ 31,801.10	\$ 54,173.98	\$ 70,300.35	\$ 95,727.33	\$ 154,422.78
%FPL	247%	311%	320%	361%	497%
Washington County	\$ 36,155.86	\$ 57,191.33	\$ 71,403.40	\$ 94,806.47	\$ 144,473.67
%FPL	281%	328%	325%	358%	465%
Yamhill County	\$ 33,210.14	\$ 51,912.40	\$ 63,531.74	\$ 83,371.06	\$ 123,464.96
%FPL	258%	298%	289%	315%	398%
Clark County	\$ 30,756.90	\$ 48,584.59	\$ 60,219.16	\$ 79,647.82	\$ 120,376.66
%FPL	239%	279%	274%	301%	388%
Skamania County	\$ 28,484.07	\$ 44,680.15	\$ 54,932.57	\$ 71,964.98	\$ 106,813.92
%FPL	221%	256%	250%	272%	344%
Overall	\$ 32,743.03	\$ 52,179.40	\$ 65,031.83	\$ 86,220.35	\$ 131,066.51
%FPL	254%	300%	296%	325%	422%

Source: University of Washington 2021. The Self-Sufficiency Standard for Oregon 2021. <https://www.oregon.gov/workforceboard/data-and-reports/Documents/The-Self-Sufficiency-Standard-For-Oregon-2021.pdf>.

FPL = federal poverty level; SSS = Self-Sufficiency Standard

Table 6-3 also shows that while these standards are highly specific to family composition and geography, it may be difficult to practically apply to the process of determining household eligibility. ALICE and SSS can still be used to judge the effectiveness of using FPL multiples as benchmarks in reaching the right level of intended users.

See Appendix A for more information on ALICE and the Oregon SSS.

7 Case Study Findings

This chapter reviews best practices and lessons learned from other income-based toll programs and fare systems. The case study analysis and stakeholder interviews revealed many barriers to enrollment in low-income benefit programs, but providers still face difficulties in lowering those barriers. The review of national programs and feedback from the Equity and Mobility Advisory Committee feedback suggest that the other programs' benefits, such as free transponders or a \$25 annual credit, are not appealing enough to increase enrollment significantly.

7.1 National Case Studies

The process to develop this draft report included a national scan of existing or proposed low-income programs that could offer best practices or lessons learned. This research identified only two low-income toll programs operating in the United States. While the lessons learned from the two programs are valuable, the research effort was also broadened to assess low-income programs in Oregon in general, relevant transit fare low-income programs, as well as proposed low-income toll programs. The research also included a focus on enrollment options for low-income programs.

7.1.1 Existing Low-Income Toll Programs

The two existing low-income toll programs are in Los Angeles, CA, and in the Norfolk, VA, metro area.

For eligible participants, the **Los Angeles Metro Low-Income Assistance Program** waives a \$1 monthly account maintenance fee and provides a \$25 credit to offset the cost of purchasing the transponder.¹⁰ Households that report an annual household income of less than 200% of the federal poverty level (FPL) are eligible. The program's value was initially set to match the cost of the transponder, and as such, another way to describe the program is that it provides a free transponder to participants. Because of the relatively low value of the benefit, LA Metro does not require users who have qualified for the program to requalify on a recurring basis. In 2020, LA Metro considered increasing the value of the toll credit provided to participants, since there is an understanding that despite significant marketing efforts, the limited enrollment in the program is likely due to the low value of the benefits provided to users—3% of all transponders used on the toll corridors are enrolled in the program. Furthermore, LA Metro also provides toll credits for users of transit on the corridor (and bus passes for roadway users), and uses net revenues from the corridor to fund multimodal mobility projects in adjacent communities. The key lessons learned are:

- Transponder purchase costs can be a barrier for corridor users experiencing low incomes.
- If the program verifies income, it may not be necessary to re-verify annually.
- Program enrollment will be suppressed if the value of the benefit is low.
- It is possible to use toll revenues for equity programs beyond providing credits and discounts.

The **Virginia Department of Transportation (VDOT) Toll Relief Program** provides eligible participants with discounts on various toll tunnels in the Norfolk, VA, metro area. In order to join the program, users must apply at an E-ZPass customer service center, of which there is one in each city, both of which are on bus lines and are accessible to people with disabilities. This program provides low-income residents of two towns directly adjacent to the toll tunnels a 50% discount on their first ten trips per week. Until

¹⁰ <https://www.metroexpresslanes.net/offers-discounts/low-income-assistance/>

recently, this program was designed differently so that benefits would accrue primarily to drivers using the tunnels frequently—approximately 2,000 to 3,000 users are enrolled in the program, with the average benefit being approximately \$25 per month. A prominent aspect of this program is that it is led by a steering committee of local stakeholders, including representatives from the NAACP, the Hispanic Chamber of Commerce, local military bases, local business owners, and local elected officials. With a diverse slate of members, a steering committee involving local stakeholders can help focus communities continue to have a voice with regard to program features and functions on a recurring basis once it is implemented. As a further equity accommodation, VDOT dropped the required minimum balance on the E-ZPass transponder from \$35 to \$20. VDOT has found that enrollment, verification, and maintenance costs add up to approximately 15% of the value of the benefit distributed—the state pays for these aspects of the program, and the private concessionaire absorbs the cost of the reduced tolls.

The key lessons learned are:

- It is likely that significantly less than all eligible corridor users will enroll in a low-income program.
- A steering committee or equity panel can help people experiencing low incomes continue to shape the program on an ongoing basis.
- The minimum balance on transponders as well as the size of automatic reloading events can be significant barriers for people experiencing low incomes.
- The cost of income verification is a significant share of overall program costs for low-income toll programs.
- A thoughtful and broadly accessible enrollment process is key to driving program enrollment and equity.

Additional research on corridor-length and shorter-length (e.g., bridge replacement) tolling programs and projects is included in Appendices B and C.

7.1.2 Proposed Low-Income Toll Programs

Various states and cities around the United States are actively considering implementing low-income toll programs, including Washington State; the Oakland, CA, metro area; the San Francisco, CA, metro area; San Bernardino County, CA; Colorado; and Minnesota. The studies conducted for these programs reflect the lessons learned from existing programs, and also include:

- In Washington State:
 - The proposed program provides recurring monthly toll credits or free toll trips to all eligible Washington residents using the corridor, and proposes to provide free transponders, establish a program advisory panel, and be intentional about program accessibility.
 - The State has an existing online system for instantly checking whether an individual has qualified for any state benefits, significantly simplifying the income verification process.
 - The proposed low-income toll program was chosen to:
 - acknowledge the value of program simplicity for users and implementing agencies
 - be responsive to stakeholder and user feedback that occasional free trips were highly valuable for making emergency trips

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- leave open the possibility that transponders may not have required balances, credit, or debit cards for program users, all of which can present significant barriers, and
- be flexible in when the benefits can be used, to acknowledge that people experiencing low incomes have greatly divergent mobility needs, and they know their own mobility needs best.
- A program option choice framework considering user benefits, program practicality, and costs guided the choice of program options, with the framework reflecting feedback, knowledge, and preferences from stakeholders, decisionmakers, and the community.
- In the Oakland, CA, metro area, the implementing agency has expressed a desire to learn by observation rather than modeling or multi-year study, and is in progress to launch a pilot of a low-income toll discount program on a set of express lanes.
- In Colorado, the proposed low-income toll program includes a significant amount of choice for users and the community. In the program's first year, program participants can choose from a \$100 toll or transit credit. The program is planned to be set up with an advisory panel, and in future years, the community will choose whether to allocated funding from net toll revenues to further toll credits, transit credits, or a combination. This kind of choice makes programs more complicated for users and implementers, but can provide significant value to program users and communities who understand their own needs best.
- In the San Francisco, CA, metro area, the San Francisco County Transportation Authority is planning a low-income toll program for access to Treasure Island via a toll bridge. The agency is strongly considering a tiered benefit, with possibly a toll waiver for those in the lowest quintile for household incomes, and a 50% discount for those in the second-lowest quintile for household incomes, or alternately a 75% discount for the second-lowest quintile and a 50% discount for the middle quintile. Notably, the agency feels that 200% of the FPL is too low as a threshold for low-income determination in the San Francisco, CA area.

7.1.3 Existing Low-Income Transit Fare Programs

A significant number of transit agencies around the country offer discounts to people experiencing low incomes. This section discusses the three programs with most relevant lessons learned and practices. Of course, the funding and operations models for highways and transit agencies are significantly different, and as such the levels of benefit provided may not be analogous to toll road contexts.

TriMet, the primary public transportation operator in the Portland metro area, provides a low-income assistance program that provides qualifying riders with reduced fares. The agency's electronic fare program, Hop Fastpass, can also be used on the Portland Streetcar and buses operated by C-TRAN, the Clark County, Washington, public transportation agency. Program eligibility comprises four principles: applicants must be Oregon residents, have incomes at or below 200% of the FPL, be between the ages of 16 to 64 (with older and younger individuals eligible for different discount programs), and verify their identity. The program provides between a 50% and a 75% discount on various transit passes. Best practices and key lessons learned from this program include:

- Program funding is through payroll taxes and so is reliable and sustainable.
- The program requires users to provide proof of income, and TriMet feels this causes them to turn away potential users who are probably eligible but don't have the appropriate paperwork.

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- The agency is thoughtful and deliberate about encouraging high levels of enrollment (with approximately 10% of eligible individuals in the Portland metro area enrolling), through:
 - Designing the program to have a single point of centralized administration within the government, while also having many different points of contact for participants, since TriMet is partnered with cities and community organizations to help people access the benefit.
 - Providing multiple enrollment options, with an online application as well as seven in-person locations, reducing barriers to enrollment.

In the Seattle, WA, metro area, **King County Metro** provides two low-income fare programs, one of which provides discounted rides to people with incomes below 200% of the FPL, and the other of which provides free rides to people who have incomes below 80% of the FPL and are enrolled in one of six state benefit programs.¹¹ They key lessons are:

- Recognizing the people have a wide range of ability to pay for transportation costs, and as such creating a tiered program that provides more benefits to people experiencing very low incomes as opposed to people experiencing moderately low incomes.
- Using enrollment in other government programs as a substitute for direct verification of income for program enrollment.

LA Metro's Low-Income Fare is Easy (LIFE) program provides a free 90-day transit pass, followed by a choice of fare credit or fare discount. A key practice from the program is its use of self-certification, in which program users are allowed to state that their income is below the program's eligibility thresholds without having to provide further documentation. This process makes the enrollment process easier for program participants, and cheaper for the implementing agency. Furthermore, the agency encourages enrollment by promoting the program and allowing in-person registration at pop-up locations and community fairs—in general, meeting potential participants where they already are can greatly increase the share who enroll in a benefit program.

7.2 Lessons Learned for Eligibility and Enrollment

This case study analysis provides insight into best practices for and lessons learned from existing and planned programs. This section expands upon these for eligibility and enrollment. An overall theme is that driving enrollment in low-income toll programs, and in benefit programs in general, is a significant challenge. Barriers can include knowledge and understanding of the programs, the low value of benefits provided, balance and banking requirements for transponders, the cost and complication of in-person and paperwork-intensive enrollment processes, and a lack of thorough accessibility in the enrollment process. For example, the review of national programs and feedback from the Equity and Mobility Advisory Committee suggests that the benefits offered by some other programs, such as free transponders or a \$25 annual credit, are insufficiently appealing to someone going through the enrollment process.

The following subsections summarize best practices and lessons learned from the national case studies in two categories: eligibility thresholds and self-certification.

¹¹ The six Washington state benefit programs: Temporary Assistance for Needy Families (TANF)/State Family Assistance (SFA), Refugee Cash Assistance (RCA), Aged, Blind, or Disabled Cash Assistance (ABD), Pregnant Women Assistance (PWA), Supplemental Security Income (SSI), Housing and Essential Needs (HEN).

7.2.1 Eligibility Thresholds

Income thresholds for benefit programs can consist of a single threshold, for example everyone whose income is below the FPL qualifies, which are called one-tier programs. Alternately, they can consist of multiple thresholds, for example below whose income is below the FPL receive a large benefit and people whose incomes are instead below 300% of the FPL receive a smaller benefit, which are called multi-tier programs. Multi-tier programs are more challenging to implement and for users to understand, but they are often more equitable and economically efficient in distributing benefits to those who most need it, while still providing benefits to people experiencing moderately low incomes. Both one-tier and multi-tier eligibility thresholds are used for benefit programs around the country.

Many of the toll and fare equity programs analyzed use a multiple of the FPL as a reference to determine eligibility for benefits. FPL is widely known, but it no longer reflects the current cost of basic household necessities or differences in cost of living across specific geographies in the United States. Depending on the median income in an area, people experiencing low income or very low income compared to other members of their local community may still have incomes that fall above the FPL, even though the local cost of living may exceed their income. Agencies in Portland, and the other geographies listed above, use a multiple (e.g., 200%) of the FPL as a threshold to right-size the program eligibility threshold with the local cost of living. Table 7-1 outlines income requirements used by the low-income programs listed in the case studies.

Table 7-1. Income Requirements for Various Low-Income Programs

Program	Income Cap Requirements
LA Metro toll program ^[1]	200% FPL
VDOT toll program ^[2]	Approximately 200% FPL
Washington proposed toll program ^[3]	Approximately 200% FPL
San Francisco proposed toll program ^[4]	Various tiers, up to median area income
TriMet fare program ^[5]	200% FPL
King County Metro fare programs ^[6]	200% FPL for lower tier; 80% FPL plus enrollment in one of six state benefit programs for higher tier
LA Metro fare program ^[7]	HUD very low income level for Los Angeles

[1] <https://www.metroexpresslanes.net/offers-discounts/low-income-assistance/>

[2] <https://www.virginiadot.org/newsroom/statewide/2021/enrollment-now-open-for-2022-vdot-toll-relief-program12-1-2021.asp#:~:text=Beginning%20December%201%2C%202021%2C%20Norfolk,to%2010%20trips%20per%20week.>

[3] <https://wstc.wa.gov/wp-content/uploads/2021/08/2021-WSTC-Tolling-Equity-Report.pdf>

[4] https://www.sfcta.org/sites/default/files/2022-01/TIMM_PIR_2021_2022-01-21.pdf

[5] <https://trimet.org/lowincome/>

[6] <https://kingcounty.gov/depts/transportation/metro/fares-orca/subsidized-annual-pass.aspx>;

<https://kingcounty.gov/depts/transportation/metro/fares-orca/orca-cards/lift.aspx>

[7] <https://kingcounty.gov/depts/transportation/metro/fares-orca/orca-cards/lift.aspx>

FPL = federal poverty level; HUD = U.S. Department of Housing and Urban Development; VDOT = Virginia Department of Transportation

As discussed elsewhere in this draft report, two methodologies called ALICE (Asset Limited, Income Constrained, Employed) and Oregon SSS (Self-Sufficiency Standard) attempt to calculate an updated version of the FPL, assessing the income one needs to fulfill all basic necessities based on family size and home geography. The resulting figures are significantly higher than the FPL, and for the Portland metro area are in the vicinity of 400% of the FPL.

7.2.2 Self-Certification

To qualify for enrollment in low-income benefit programs, applicants are required to state or demonstrate that their household income meets the eligibility requirements. Applications may require documentation to prove income, such as a paystub, benefit letter, or other approved document. However, self-certification allows applicants to certify their income without substantiating documents. Applicants may be asked to check a box on the application that says, “I verify that the income I selected is true.” Some programs may also require applicants to agree to provide proof of income in the future.¹² Self-certification reduces barriers to enrollment in low-income benefit programs. Benefit programs in general, and particularly programs with self-certification, commonly generate discussion and concerns about the possibilities of fraud. In practice, much of this discussion is grounded in prejudice and stereotype, and benefit programs like the low-income toll program being considered here are not shown to generate a meaningful amount of fraud. When balanced against the significantly lower costs of program operation, increased enrollment, and time and cost saved to program users, the benefits are likely to outweigh the costs.

In particular, the Low-Income Toll Program would have features that further limit the potential for and cost of fraud:

- **Benefits cannot be cashed out:** The fact that the benefits can only be used for travel on the toll corridors, and cannot be cashed out, significantly limits the potential for professionalized fraud at scale, by far the most visible kind of fraud observed in benefit programs.
- **Use of the benefit is limited:** The low-income toll benefit only applies to people who use the tolled I-5 and I-205 facilities, which significantly limits the potential for fraud, as users would have to live in the project area (and not qualify for the program themselves).
- **Benefits are administered on a small scale:** Each person only receives one instance of the benefit at a time. Furthermore, if the final benefit chosen is bounded—that is, it is a credit or a number of free trips, that makes fraud even less appealing, as it is much less likely that many would commit fraud for a benefit that is limited to a fairly small value. More research may be needed to understand whether a full exemption would invite more illegitimate use of the program by extremely frequent (for example commercial) users of the corridor, who can thus achieve significant savings by misusing the program—a preferred way of addressing this issue is by performing focused income checks for self-verified accounts that become power users of the program.

Self-certification of income can be beneficial to increase accessibility to the low-income toll program and therefore increase overall enrollment. Although there may be some concerns about fraud, some of which arise more from stereotype and bias, administering a program without self-certification may be more costly than potential losses from fraud.

¹² Self-certification example: <https://www.hudexchange.info/resource/4786/cdbg-selfcertification-of-annual-income-form>

8 Evaluation Framework for Type of Benefit

This chapter provides a high-level evaluation framework the Project Team developed using other agencies' experiences and input from various stakeholders to evaluate different options for the low-income benefit.

To help guide the options for consideration in this draft report, the Project Team used other agencies' experiences and the input from various stakeholders to develop a high-level evaluation framework and a set of metrics to evaluate different benefit options. Further detail on the metrics and the evaluation framework is provided in Appendix C. The decision-making framework considers the type(s) of benefits to provide, the method of enrollment, and the selection of income criteria. The set of metrics includes the benefit to program participants, the cost of implementing the program, its impact on roadway operations, and feasibility of implementation. Key terms and concepts include the following:

- **Income threshold:** Household income within a defined range of eligibility for program participation (e.g., Households 0% to 100% of the federal poverty level).
- **Toll discount:** A discount applied to the assessed toll for each trip (e.g., 50% discount on a \$3 toll would result in the driver paying \$1.50). A toll discount is applied as the trip is charged, so the driver would pay the discounted price. Discounts are the easiest for participants to understand and track but require reloading a toll account and may incentivize travel during peak hours.
- **Toll credit:** A credit applied to a transponder account on a recurring basis (e.g., A \$25 toll credit applied to the transponder account every 6 months). Credits diminish the burdens of payment card requirements, minimum account balances, and automatic reloading events. Credits also incentivize travel during non-peak hours.
- **Free trip(s):** A set number of free trips are applied to a transponder account on a recurring basis (e.g., 10 free trips in the tolled area per month). Free trip(s) diminish the burdens of payment card requirements, minimum account balances, and automatic reloading events but may incentivize travel during peak hours.
- **Exemption:** Those enrolled in the Low-Income Toll Program are exempt from paying any toll costs. This discount option places the least burden on travelers experiencing low incomes but may incentivize travel during peak hours.
- **Income verification:** The process to determine that an applicant is within the eligible income range. This can be done through providing proof of income (such as a W2), through enrollment in another approved low-income benefit program (such as the Supplemental Nutrition Assistance Program [SNAP]), or through self-certification (applicant certifies their income without proof of income). Income verification can be a barrier to enrollment, but that can be improved by accepting enrollment in another low-income benefit program or allowing self-certification.

Based on the decision-making framework and the set of metrics, a score was assigned to each benefit option. The score was shaped by the relative weighting of each metric. Both the weighting for each metric and the score for each option on each metric can be revised based on feedback from stakeholders. This iterative revision process is part of the decision-making framework.

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The following high-level ideas are the basis of the decision-making framework, the weighting for each metric, and the initial scores:

- People experiencing low incomes have a diverse set of travel needs, and their commute trips tend to be more broadly distributed at all hours of day, as opposed to being confined to peak hours.
- Eligibility threshold: A multi-tier eligibility threshold makes tolling less regressive, but it is harder to understand for program users and costlier to implement. Stakeholders have emphasized the benefits of both options: simplicity is critical, but so is acknowledging the different travel and budget needs of people experiencing very low income as opposed to people experiencing moderately low income.
- Discount type:
 - Credit or free-trip option (as opposed to a discount) diminishes the burdens of credit card or debit card requirements, minimum account balances, and automatic reloading events.
 - Given the early stage in developing the toll program, all discount options appear equally feasible from a tolling back-office perspective. Self-certification is much simpler for the implementing agency than a verification option.
 - Percentage discounts and free trips incentivize travel during peak hours and add trips to the toll network when it is most stressed due to peak-hour demand. In contrast, toll credits and fixed discounts incentivize traveling off-peak, but they also have less impact on making the time-saving distribution more equitable.
 - Percentage discounts are easiest to understand and track for program participants, but they have disadvantages, such as necessitating the funding of toll accounts, whether with cash or a credit/debit card, both of which can present challenges for people experiencing low incomes.
 - Stakeholders broadly support percentage discounts, credits, and a fixed number of free trips.
 - Income verification: Self-certification is a much simpler model of income verification for the implementing agency than a verification option.

The decision-making framework based on the high-level ideas above led to the scoring system shown in Table 8-1. Higher numerical scores (up to 6.2) are better, and lower scores (down to 3.4) are considered worse. In general, the scores indicate the following:

- A recurring credit or a recurring number of free trips provides the greatest combined value for users and the operating agency, followed by a percentage discount.
- Self-certification is more efficient overall than actively verifying income on enrollment.
- One-tier and multi-tier options both work well, with a slight edge to multi-tier program versions.

Table 8-1. Initial Scores for Each Discount Option

Discount Option	Enrollment	Weight --->	100%
		Tiered	Total
Percent Discount	Self-Certification	One-tier	5.0
		Multi-tier	5.3
	Confirmed Eligibility	One-tier	3.6
		Multi-tier	3.7
Number of Free Trips	Self-Certification	One-tier	6.1
		Multi-tier	6.2
	Confirmed Eligibility	One-tier	4.1
		Multi-tier	4.1
Monthly Credit	Self-Certification	One-tier	5.7
		Multi-tier	5.8
	Confirmed Eligibility	One-tier	4.0
		Multi-tier	4.0
Fixed discount	Self-Certification	One-tier	4.7
		Multi-tier	5.0
	Confirmed Eligibility	One-tier	3.4
		Multi-tier	3.5

The [Toll Program and Affordability Research](#), Appendix C and Appendix D provide a review of low-income toll programs and additional information on the evaluative framework.

9 Options for Consideration

This chapter details this draft report's three options for establishing and operating a low-income toll program, including the justification for each option, considerations for refinement, and next steps for exploration and eventual implementation.

9.1 Provide a significant discount (e.g., Credits, Free Trips, Percentage Discount, or Full Exemption) for Households Equal to or below 200% Federal Poverty Level

9.1.1 Key Findings

- People experiencing low incomes may already have difficulty meeting basic needs such as paying for food, shelter, clothing, and healthcare. A discount or credit would alleviate the burden of choosing between paying a toll and meeting those basic needs.
- The federal poverty level (FPL) is split into household/family size, ranging from 1 to 14 people. Since the FPL does not account for many household expenses and does not account for the cost of living in specific geographies, programs in urban areas often instead use a multiple of the FPL, such as 200% FPL, instead of 100% FPL to determine qualifications.
 - In 2022, the average annual income at 200% FPL is \$27,142 for a household/family size of one and \$55,500 for a household/family size of four.¹³
 - In the Portland region, about 25% of the population have incomes at or below 200% of the FPL. This is lower than Oregon overall.
- Case study research and stakeholder interviews shows that the 200% FPL threshold is commonly used to determine eligibility for existing low-income benefits programs in Oregon and nationally. The 200% FPL threshold has therefore set an easily understood precedent on who should qualify for low-income benefits programs.
- Using the same income threshold as existing low-income programs, such as the TriMet Hop Fastpass, may allow the Oregon Department of Transportation (ODOT) to leverage other programs for low-income verification as part of the Oregon Toll Program. This would benefit people experiencing low incomes by reducing barriers to access, in addition to potentially reducing costs and security risks for ODOT associated with enrollment and verification. Additional conversations with these programs are needed to fully understand the feasibility of ODOT leveraging existing programs.
- In combination with self-certification, a monthly credit, percentage discount, or providing a specific number of free trips all scored the highest in the evaluative framework.
- EMAC supported a sizable benefit at 200% FPL but was divided on whether it should be a completely free option or one that is deeply subsidized (90%).
- Findings from two separate sensitivity tests indicate how a 50% discount for people experiencing low incomes may affect project outcomes—specifically, daily traffic volumes on Interstate 5 (I-5) and I-205 and gross toll revenue. The sensitivity test results are not meant to represent exact outcomes of the

¹³ Assistant Secretary for Planning and Evaluation. 2022 Poverty Guidelines: 48 Contiguous States (all states except Alaska and Hawaii). Retrieved on June 8, 2022 from: <https://aspe.hhs.gov/sites/default/files/documents/4b515876c4674466423975826ac57583/Guidelines-2022.pdf>

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options in this draft report; rather, they suggest the pattern of how a low-income benefits program might affect project outcomes.

- For the **I-205 Toll Project**, a 50% discount for the low-income vehicle class would increase daily traffic volume by 2% and decrease gross toll revenue by 1% compared to the Project's baseline scenario (based on the modeling analysis in 2040 conditions). The baseline scenario is Alternative 3 from the I-205 Toll Project Comparison of Screening Alternatives Report, which includes two toll locations: The Abernethy Bridge and the Tualatin River bridges located east of Stafford Road.
- For the Regional Mobility Pricing Project, the Project Team applied a 50% toll discount to low-income vehicle trips, which make up about 10% to 15% of potential automobile trips on I-5 and I-205 (based on the modeling analysis in 2045 conditions). The team also applied a 50% toll discount to the same low-income vehicle trips in addition to half of the medium-income vehicle trips, accounting for a total of 35% to 40% of potential auto trips on I-5 and I-205. In summary, the smaller (less inclusive) discount program (50% discount on all low-income trips) would increase daily traffic volume by 2% from the baseline, and the larger discount program (50% discount on all low-income trips and half of medium-income trips) would increase daily traffic volume by 4% from the baseline in 2045. The smaller discount program would decrease gross toll revenue by less than 5%, and the larger discount program would decrease gross toll revenue by 10% to 15%.
- **Note on findings:** The tests were performed using the Metro Regional Travel Demand Model to assess future year conditions (in 2040 or 2045). The modeling analyses involve a number of assumptions, such as 100% enrollment in the program by all who are eligible, and the income thresholds used in the model do not perfectly match the FPL used in the draft report options. The income thresholds used in the modeling analysis for vehicle trips are divided into three groups:
 - **Low Income:** Household income under approximately \$30,000 per year (in current year dollars)
 - **Medium Income:** Household income between \$30,000 and \$125,000 per year (in current year dollars)
 - **High Income:** Household income above \$125,000 per year (in current year dollars)

9.1.2 Considerations and Next steps

- The project team will perform additional analysis for both toll projects to further explore how a discount or credit for drivers experiencing low incomes might affect project outcomes—specifically measuring change in daily traffic volume and change in gross toll revenue.
- Further along in project planning, the Level 3 Investment Grade Toll Traffic and Revenue (T&R)¹⁴ studies for both projects will refine and confirm the impacts of the low-income policy decision. The Level 3 T&R for the I-205 Toll Project, which will implement tolls to pay for the I-205 Improvements Project, is expected to occur between mid-2023 to mid-2024. Analysis of the costs to administer the low-income program will also be refined in the Level 3 Investment Grade Toll T&R study, including expected participation rates, if available and appropriate.

¹⁴ The Level 3 Toll Traffic & Revenue Study conducts a robust and independent forecast of the traffic and revenue potential for a preferred or narrowed set of toll scenarios and is used to inform and instill the confidence of investors that will arrange financing.

- Additional consideration is needed to understand customer service implications to promote program enrollment. Full exemptions and credits are easier to explain, while trip-based discounts may pose more challenges to communicate.

9.2 Provide a Smaller, More Focused Discount (e.g., Credits Or Free Trips) for Households above 201% and up to 400% of the Federal Poverty Level

9.2.1 Key Findings

- Providing a recurring credit or number of free trips for households up to 400% FPL would alleviate the burden of paying a toll for this group experiencing moderately low incomes, who may struggle to meet basic needs.
 - The review of national programs and feedback from the Equity and Mobility Advisory Committee (EMAC) suggests that the benefits offered by some other programs, such as free transponders or a \$25 annual credit, are insufficiently appealing to someone going through the enrollment process.
- The Oregon SSS (Self-Sufficiency Standard) and ALICE (Asset Limited, Income Constrained, Employed) provide additional data on cost of living to support considering some benefit provision to households up to 400% FPL.
 - The Oregon SSS calculates how much income a family must earn to meet basic needs and is derived from the costs of housing, childcare, food, healthcare, and transportation, plus the cost of taxes and impacts of 2021 tax credits.¹³ In 2021, the Oregon SSS, averaged across the state of Oregon, is \$31,521 (245% FPL) for a household/family size of one and \$82,447 (311% FPL) for a household/family size of four. However, when averaging the Oregon SSS for the seven counties that comprise the Portland-Vancouver-Hillsboro, OR-WA Metro Area only, the thresholds increase, ranging from 254% of FPL for a household of one to 422% of FPL for a household of five.
 - The ALICE Threshold for Survival estimates a more constrained household budget that represents the bare minimum for families to make ends meet. As a multiple of FPL, the threshold for survival varies greatly depending on household size. Averaged across the state of Oregon, the Household Survival Budget is \$25,380 (200% FPL) for a household of one and \$75,768 (286% FPL) for a household of four.
 - The ALICE Household Stability Budget estimates the higher costs of maintaining a viable household over time including a 10% savings category that can be used in an emergency, for additional education, or to buy a home.¹⁵ For 2018, the most recent data year, the ALICE is \$51,216 (398% FPL) for a household/family size of one and \$118,896 (449% FPL) for a household/family size of four.

¹⁵ <https://www.unitedforalice.org/household-budgets-mobile/oregon>

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- In 2022, the average annual income at 400% FPL is \$54,360 for a household/family size of one and \$111,000 for a household/family size of four.¹⁶ In the Portland region, about 29% of people have incomes between 201% FPL and 400% FPL.¹⁷
- Stakeholders support providing some benefit up to 300% FPL:
 - Respondents from the May 2022 regional online survey support providing some benefit to a range of incomes, up to 300% FPL. Respondents generally chose a higher income threshold for eligibility (300% FPL) compared to a lower income threshold (200% FPL). The survey was developed prior to case study research and regional economic analysis that informed income threshold considerations. While survey respondents were asked about 300% FPL, the upper income limit was revised to 400% FPL to reflect additional research findings regarding cost of living (Table 4-1).
 - EMAC received a presentation on preliminary findings and members expressed support for providing a sizeable benefit at 200% FPL and a smaller benefit at 400% FPL. EMAC also agreed that including two income ranges is worth the additional complexity so that different needs can be met.

9.2.2 Considerations and Next Steps

- Explore different certification options including self-certification because of the difficulty of verifying incomes as well the data security risk associated with collecting sensitive information, such as social security number and income, with one possible mitigation being verifiers who review but do not collect income documents. Additional research will be useful to understand the administrative costs of income verification, reviews of program usage, and revenue leakage.
- Analyze of the costs to administer the low-income program, which will be refined in the Level 3 Investment Grade Toll Traffic and Revenue study, including expected participation rates, if appropriate.
- Determine a communication strategy to inform potential applicants about the eligibility requirements and benefits for a tiered program, which is more complicated.

9.3 Use a Certification Process that Leverages Existing Programs for Verification and Further Explore Self-Certification

9.3.1 Key Findings

- Qualification through existing low-income service program(s), such as those described in Appendix B.2, improves the ease of enrollment for applicants with incomes below 200% FPL and reduces the administrative burden and data privacy risk for ODOT.
- Self-certification allows applicants to certify their income without substantiating documents. Applicants may be asked to check a box on the application that says, “I verify that the income I selected is true” or complete an attestation form stating that applicants understand there may be penalties for

¹⁶ Assistant Secretary for Planning and Evaluation. 2022 Poverty Guidelines: 48 Contiguous States (all states except Alaska and Hawaii). Retrieved on June 8, 2022 from: <https://aspe.hhs.gov/sites/default/files/documents/4b515876c4674466423975826ac57583/Guidelines-2022.pdf>

¹⁷ U.S. Census Bureau, American Community Survey, 2015 to 2019. S1701 Poverty Status in the Past 12 Months.

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misstating or falsifying information. The process may also require applicants to agree to provide proof of income in the future.¹⁸

- Possible benefits of qualification through existing low-income service program(s) and self-certification include improving the ease of enrollment for travelers, which addresses an enrollment barrier that could contribute to low utilization of program benefits and eliminating the needs for ODOT to collect or process sensitive information.¹⁹
- In the evaluation framework, discount options with self-certification all received more favorable scores than those with confirmed eligibility.
- EMAC strongly supports a self-certification model that streamlines the low-income toll program benefit enrollment process.
- The project team conducted research to identify rates of fraud among low-income toll programs as well as low-income service programs more broadly. While we found no reports of large-scale fraud among comparable programs including ones with self-certification, and the proposed low-income toll program has several features that make it an unlikely target of systemic fraud, the project team will continue to research the topic and establish business rules to prevent fraud.
- Some features of the program that can reduce the likelihood and impact of fraud include that the program is geographically bounded to only specific toll roads, that each person receives only one instance of the benefit, and potentially that the benefit from the program is bounded (if it takes the form of a credit or a number of free trips).
- ODOT can consider the following strategies to prevent fraud:
 - Requiring the use of a specific transponder that is affixed to the vehicle and cannot be transferred between vehicles.
 - Focused monitoring requiring some program participants who are frequent users of the benefit program to submit documentation to verify their income.

9.3.2 Considerations and Next Steps

- Coordination will be needed to ensure that the certification model(s) is interoperable with Washington agencies.
- The Level 3 T&R will provide an analysis of program administration costs.
- Work with stakeholders and partners to identify existing programs to automatically qualify for the low-income toll program. LA Metro, King County Metro, and TriMet, among others, offer this to increase accessibility to the program.
- If considering self-certification, additional research is needed to understand the potential risk to and impact of program fraud, as well as to understand the efficacy and tradeoffs of fraud prevention strategies.

¹⁸ Self-certification example: <https://www.hudexchange.info/resource/4786/cdbg-selfcertification-of-annual-incomeform>

¹⁹ https://pdxscholar.library.pdx.edu/cgi/viewcontent.cgi?article=1008&context=ncpp_pub;
https://www.commonwealthfund.org/sites/default/files/documents/media_files/publications_fund_report_2009_may_1266_summer_increasing_particip_benefit_progs_v3.pdf

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- Further research is needed to understand the administrative costs of income verification. The Virginia Department of Transportation (VDOT) found that the cost of income verification is a material share of overall program costs.

9.4 Next Steps

Prior to the beginning of tolling, the Oregon Transportation Commission (OTC) will establish a rate structure based on vehicle class, time of day, location and distance, and method and payment, and will include income-based adjustments. Additionally, more work is needed to identify the implementation and operations costs associated with the options for consideration and proposed implementation practices identified in this report. Wherever possible, the Low-Income Toll Program will leverage existing systems to streamline implementation and operations. Whatever low-income benefit is decided upon will be built into the back office system before tolling goes live; a greater challenge will be messaging the low-income benefit to customers and forming creative strategies to reduce barriers to enrollment.

While the options presented in the Final Low-Income Toll Report will inform the income-based adjustments, further work and engagement will be needed to define next steps after the report is submitted to the OTC and Oregon Legislature. Ultimately, decision-making authority lies with the OTC and will occur through the rate-setting process after further robust public engagement and analysis of traffic and revenue impacts.

9.4.1 Implementation Practices

There are numerous considerations for implementing the ODOT toll projects, some of which have implications for people experiencing low incomes. While this draft report outlines recommendations to create a low-income toll program framework, the following section offers practices to consider when implementing the low-income toll program.

Transponders and Account Maintenance

Provide free transponders to people enrolled in the low-income toll program and community-based organizations or other groups helping to enroll people. Do not require a minimum dollar amount of balance to load or maintain the transponder account.

ODOT currently plans to issue transponders to all users free of charge. While stakeholder feedback indicates that a transponder credit may be an insufficient benefit on its own, it can be a complementary program component to support program enrollment. Additionally, stakeholders support measures to address enrollment barriers.

Transponder installation could be coupled with Department of Environmental Quality vehicle testing processes. For example, a driver who brings their car in for a smog check could also get their transponder installed in the same visit.

Having no minimum balance requirements will alleviate additional burdens for people experiencing low incomes, but it also raises invoicing costs, which will lead to leakage. If

Case Study:

The Los Angeles Metro Low Income Assistance Plan allows credits to be applied to the cost of the transponder and waives the \$1 monthly account maintenance fee, recognizing that transponder purchase costs can be a barrier for corridor users experiencing low incomes.

Case Study:

The Virginia Department of Transportation Toll Relief Program dropped the minimum balance on the transponder from \$35 to \$20.

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having no minimum balance requirement is infeasible, explore a low balance requirement, such as \$5.00 (Tri-Met's minimum load value).

Provide a Cash-Based Payment Option

Provide a cash-based option for paying tolls to reduce a barrier to enrollment among those who are cash-preferred.

Some individuals do not have a bank account or prefer to use alternative financial services. Others would prefer not to share banking information with a government agency. Providing a cash-based option to load transponders addresses these concerns and is supported by stakeholders. Ideally, cash loading should occur in-community (at local stores) and should not have surcharges. ODOT is already considering this option for the toll program overall.

Program Communications and Outreach

Conduct extensive marketing, promotion, and engagement with community-based organizations that starts at least 6 months before tolling begins. Post signage so that travelers can make informed decisions.

Feedback from EMAC, low-income discussion groups, social service providers, and community organizations all recommend selecting the low-income toll benefit and enrolling people in the program before tolling begins. ODOT will need to consider the timeline for program decision-making, marketing, and outreach.

One benefit of scheduled variable-rate pricing is the ability for drivers to know the toll rate before they travel. Signage communicating rates facilitates predictability and transparency.

Develop an Inclusive Enrollment Process

Create an in-person and online enrollment process that is accommodating for participants experiencing a disability, who have limited technology access or training, who speak languages other than English, and who live far away from existing customer service centers.

The Portland region is a diverse place with people of many abilities and with varying degrees of access to technology. Online resources, such as a website and mobile app, can reach a wide audience. But for those with limited technology access or training, stakeholders support offering an in-person option to provide an inclusive and accessible customer service experience. This can serve as a test bed to see if that would be successful in the statewide program.

Partnering with Oregon Driver and Motor Vehicle Services (DMV) or other social services sites could help enroll users in the low-income toll program. ODOT is already considering stationing customer service representatives at DMVs. Other potential channels include payment platforms like PayNearMe and InComm.

Case Study:

Tri-Met allows HopCard holders to load money on their account at local grocery and convenience stores, such as Safeway and 7-Eleven.

Case Study:

LA Metro's LIFE program encourages enrollment by allowing in-person registration at pop-up locations and community fairs.

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All enrollment options should be compliant with the American with Disabilities Act, accessible by multiple forms of transportation, and open for longer hours. Application materials should be available in multiple languages.

Develop Monitoring, Review, and Adjustment Process

Support a monitoring, review, and adjustment process for the low-income toll program that includes community voices and a process that is aligned with the Oregon Toll Program's Equity Framework.

Ongoing engagement and consultation with historically underrepresented and underserved communities in program monitoring, reporting, and programmatic changes facilitates building community understanding, capacity, trust, and support. It can also help planners and policymakers interpret data in local context and make more informed decisions for the low income toll program. This best practice would be applied as part of customer/user engagement. Experience from VDOT indicates that a steering committee or equity panel can help people experiencing low incomes continue to shape the program on an ongoing basis.

Prevent Debt and Criminal Penalties

For people experiencing low incomes of 400% of the FPL and below, offer education opportunities, additional time to pay toll charges, multiple notices of account balances, or set a maximum penalty amount.

Tolling should not contribute to more financial indebtedness for people experiencing low incomes, nor should it lead to criminal penalties. The existing rules for failure to pay tolls are established in Oregon law (ORS 383) and rules (731-040-0064). ODOT will need to consider the timeline, process, and consistency for defining a waiver of fines or penalties in rule. For program administration, ODOT should consider applying the same rules to all accounts within the low-income toll program.

Develop an Operation and Implementation Plan

Work with the toll implementation team to develop a concept of operations for the low-income toll program that includes an implementation framework.

More work is needed to develop an operational design and implementation plan. Such a plan will establish the necessary program details, specific policies, and technical system requirements that will enable more precise analysis and estimation of the program costs and potential impact on toll revenues and performance, long-term.

Appendix A Low-Income Benefit Programs and Thresholds

A.1 Federal Agencies

The U.S. Department of Agriculture's Supplemental Nutrition Assistance Program (SNAP) provides food benefits to low-income households based on household size. As shown in Table A-1, the income thresholds for eligibility are calculated based on a maximum income of \$16,744 for a one-person household and an additional \$5,902 for each additional person in the household. In addition, the applicant must have a current bank balance (savings and checking combined) under \$2,001, or have a current bank balance under \$3,001 and share their household with either a person aged 60 and over or a person with a disability.

Table A-1. Annual Household Income Limits (Before Taxes)

Household Size*	Maximum Income Level (Per Year)
1	\$16,744
2	\$22,646
3	\$28,548
4	\$34,450
5	\$40,352
6	\$46,254
7	\$52,156
8	\$58,058

Source: U.S. Department of Agriculture's Supplemental Nutrition Program (SNAP) for Oregon. <https://www.benefits.gov/benefit/1332>.

* For households with more than eight people, add \$5,902 per additional person. Always check with the appropriate managing agency to ensure the most accurate guidelines.

The U.S. Department of Health and Human Services' Poverty Guidelines for 2022 are as shown in Table A-2. The guidelines are calculated based on an income of \$13,590 for a one-person household and an additional \$4,720 for each additional person in the household. These guidelines are used by programs (directly or percentage multiples) such as Head Start, the SNAP, the National School Lunch Program, the Low-Income Home Energy Assistance Program, and the Children's Health Insurance Program.

Table A-2. Poverty Guidelines for 2022

Persons in Family/Household	Poverty Guideline
1	\$13,590
2	\$18,310
3	\$23,030
4	\$27,750
5	\$32,470
6	\$37,190
7	\$41,910
8	\$46,630

Source: 2022 Poverty Guidelines for the 48 Contiguous States and the District of Columbia, from the Office of the Assistant Secretary for Planning and Evaluation, U.S. Federal Poverty Guidelines used to determine financial eligibility for certain programs. <https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>.

* For families/households with more than 8 persons, add \$4,720 for each additional person

A.2 Local, Regional, and State Agencies

Oregon Housing and Community Services offers two programs that help low-income households with utility payments: Low-Income Home Energy Assistance Program and Oregon Energy Assistance Program. Households with incomes below 60% of Oregon's median income are eligible, based on household income and household size.

OREGON TRAIL CARD – ELECTRONIC BENEFITS TRANSFER (EBT) CARD

The Oregon Trail Card used for state benefits include SNAP food benefits and Temporary Assistance for Needy Families (TANF) cash benefits. Benefits are deposited into the account each month, and the card functions like a debit card.

For families and single adults without a disability, eligibility for SNAP food benefits can be determined via 65 Oregon Department of Human Services Self-Sufficiency offices in the state (example for different family types in Figure 9-3). For seniors and people living with disabilities, eligibility is determined via 76 Oregon Department of Human Services Aging and People with Disabilities and Area Agency on Aging offices in the state. Applications may be emailed or dropped off in person, mailed, or faxed to the appropriate office.

TANF is available for people who live in Oregon, experience low income and very few assets, and are either 18 or younger and head of their household, are pregnant, or have a child who is 18 or younger. Eligibility is determined via 65 Oregon Department of Human Services Self-Sufficiency offices in the state (example for Oregon counties in Figure 9-4). Applications may be emailed or dropped off in person, mailed, or faxed to the appropriate office. People who qualify for TANF are also eligible for employment and training via Oregon's Jobs Opportunity and Basic Skills (JOBS) program.

UTILITY BILL PAYMENT ASSISTANCE

Oregon Housing and Community Services offers two programs that help low-income households with utility payments: Low-Income Home Energy Assistance Program and Oregon Energy Assistance Program. The Low-Income Home Energy Assistance Program helps participants with energy expenses and may help repair or replace heating systems as well as improve household energy efficiency through the Weatherization Program. Oregon Energy Assistance Program assists households at risk of losing electricity access. Both programs are administered by Community Action Agencies with Oregon Housing and Community Services funding; each of Oregon's 36 counties has a Community Action Agency. Households with incomes below 60% of Oregon's median income are eligible, based on household income and household size. Both renters and owners are eligible, but benefit levels may vary for renters based on rental or utility agreements and landlord cooperation.

PORTLAND TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) LOW-INCOME FARE PROGRAM

Seniors aged 65+, people on Medicare, people with a disability, and people experiencing low incomes, termed Honored Citizens, are eligible for 50% to 72% less than Adult fare. Discounts apply to rides on buses, MAX, WES, Portland Streetcar, and C-TRAN. An ID is required for proof of eligibility upon boarding. After spending \$2.50 in a day or \$28 in a calendar month, Honored Citizens may ride for free. Payment options for Honored Citizen fares include: a paper Hop ticket available at MAX/WES stations; a virtual Hop card in the Hop app; or a physical Hop card that can be bought (\$3 for a card) and reloaded (via Hop website, app, or phone hotline) at 500+ local retailers including supermarkets, pharmacies, and convenience stores. Physical Hop cards do not require a bank account, credit card, smartphone, or

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Internet access. Honored Citizen discounts are not available through the mobile wallet or physical bankcard (direct tapped on Hop readers) options.

Table A-3. Portland Tri-County Metropolitan Transportation District of Oregon (TriMet) Low-Income Fare Program

Facility Type	Mass Transit Fare
Tiered Benefits?	No
Program Features	<ul style="list-style-type: none"> Low-income users receive discounts of 50% to 72% off the adult fare, depending upon whether fares are for single ride, day pass, or monthly pass. Users automatically qualify with enrollment in Oregon Health Plan, SNAP, Energy Assistance, Free/Reduced Lunch, HUD Assistance, TANF, or Employment DayCare.
Income Requirements	200% FPL or below.
Proof of Income	WorkSource employment/wage verification, Current IRS transcript, W2 form from the most recent tax year, signed copy of federal tax return, or unemployment benefit letter and current weekly pay stub.
Residence Requirements	Oregon State
Proof of Residence	Valid government-issued ID
Enrollment Method	Online application, req. document upload and video enrollment call. Hop cards must be picked up in person at the TriMet Ticket Office at Pioneer Courthouse Square. ^[1]

[1] <https://trimet.org/lowincome/>

Table A-4. King County Metro Subsidized/Reduced Transit Fare

Facility Type	Mass Transit Fare	
Tiered Benefits?	Yes	
Program Features	Subsidized annual pass, ^[1] which allows free (\$0) fare for select road-based transit services (King County Metro buses, RapidRide, Access, Via to Transit, Sound Transit express buses), water (King County Water Taxi), and rail (Seattle Center Monorail, Seattle Streetcar, Link Light Rail, Sounder commuter train); reduced fare for other transit modes is also available through the E-purse available through the ORCA card.	ORCA LIFT, a transit pass with reduced fares. ^[2] Discounts range widely depending on mode and provider, from 25% (Everett Transit) up to 74% (Sounder Train). Both Pierce Transit and Washington State Ferries do not participate in the discount program.
Income Requirements	80% FPL or below plus enrollment in one of six state benefit programs.	200% FPL
Proof of Income	Temporary Assistance for Needy Families (TANF)/State Family Assistance (SFA); Refugee Cash Assistance (RCA); Aged, Blind or Disabled Cash Assistance (ABD); Pregnant Women Assistance (PWA); Supplemental Security Income (SSI); and Housing and Essential Needs (HEN).	Proof of enrollment in certain state programs, letters or other proof of employment or unemployment, or tax returns.
Residence Requirements	Yes, King, Pierce, and Snohomish counties	No
Proof of Residence	Valid government-issued ID	N/A
Enrollment Method	Enrollment verification occurs by telephone or in person at Washington State Department of Social and Health Services, Seattle & King County Department of Public Health, and non-profit Catholic Community Services across King, Pierce, and Snohomish counties; or online through the King County Reduced Fare Portal. Online application requires uploading images of verification documents, including photo ID.	Enrollment verification occurs by calling the King County Community Health Access Program, applying online using the Reduced Fare Portal, or visiting authorized enrollment offices in King County.

[1] <https://kingcounty.gov/depts/transportation/metro/fares-orca/subsidized-annual-pass.aspx>

[2] <https://kingcounty.gov/depts/transportation/metro/fares-orca/orca-cards/lift.aspx>

Table A-5. LA Metro Low-Income and Transit-Rider Credit and Waiver of Recurring Fees

Facility Type	Highway Toll/Mass Transit Fare Cross-Benefits
Tiered Benefits?	No
Program Features	<ul style="list-style-type: none"> • Low-income users receive one-time \$25 toll credit and waiver of \$1 monthly account maintenance fee • Users who ride the buses on the express lanes receive a \$5 toll credit for every 16 bus trips • Spends net toll revenues of neighborhood projects • Users must have an electronic fare (TAP) card
Income Requirements	200% FPL or below
Proof of Income	Check stub, EBT card, proof of free-reduced school lunch receipt
Residence Requirements	Yes, Los Angeles County
Proof of Residence	Photo ID
Enrollment Method	Enrollment verification requires users to travel to or call a customer service center and show/fax proof of Los Angeles County residence as well as income

Table A-6. Elizabeth River Tunnels

Facility Type	Tunnel Toll
Tiered Benefits?	No
Program Features	Low-income users receive a 50% discount for 2-axle tolls in the Downtown and Midtown tunnels for up to 10 trips per week. ^[1]
Income Requirements	\$30,000 annual income (approx. 200% FPL) or below
Proof of Income	Acceptable documents include W-2, 1099-MISC, One month of pay stubs, IRS 1040, Employer's statement, Self-declaration of no income.
Residence Requirements	Yes, Portsmouth City or Norfolk City Counties
Proof of Residence	Driver's license, utility bill, bank account statement, property tax bill, proof of home ownership, or rental contract
Enrollment Method	Enrollment verification requires users to apply at an E-ZPass customer service center in Norfolk or Portsmouth.

^[1] <https://www.virginiadot.org/newsroom/statewide/2021/enrollment-now-open-for-2022-vdot-toll-relief-program12-1-2021.asp#:~:text=Beginning%20December%201%2C%202021%2C%20Norfolk,to%2010%20trips%20per%20week.>

Table A-7. SFCTA’s TIMMA Low-Income Toll Program (Planned)

Facility Type	Cordon Per-Direction Toll	
Tiered Benefits?	Yes	
Program Features	<ul style="list-style-type: none"> • Estimated start date is 2024 • Non-resident private vehicles will be tolled when entering and exiting the island at \$5 per-direction peak and \$2.50 per-direction off-peak. Households with moderate and low incomes are eligible for a 50% discount. • Households with very low incomes are eligible for toll exemption. • Treasure Island residents will be exempt from the toll. • Spends net toll revenue on expanded transit service and mobility improvements. • Treasure island employers will also be provided a quarterly subsidy, which may be used to compensate employees with low incomes or add cash value to toll tags.^[1] 	
Income Requirements	Less than 55% Area Median Income	55-120% than Area Median Income
Proof of Income	Unknown	Unknown
Residence Requirements	Yes	Yes
Proof of Residence	Toll only applies to non-residents	Toll only applies to non-residents
Enrollment Method	Unknown	Unknown

^[1] https://www.sfcta.org/sites/default/files/2022-01/TIMM_PIR_2021_2022-01-21.pdf

MEDELLÍN, COLOMBIA

We mention the Metro de Medellín in Colombia here because they offer a wide range of tiered fare options as they operate a variety of transit modes in the city including rail, bus, and gondola. Tiered fares are determined by average neighborhood income, and the lowest tiers pay a small percentage of full fare. Gondola lines like the Cable Arví, which travel between the city center and the neighborhoods and parks in the surrounding hills, have a qualification system based off of Colombia’s SISBEN system, where the economic well-being of individual households are evaluated for the purpose of selection for social programs.

A.3 Regional Incomes, Cost of Living, and Eligibility Thresholds

Many of the above toll equity programs use the federal poverty level (FPL) as a reference to determine eligibility for benefits. FPL is a national standard, allowing it to be easily referenced and understood, however does not always reflect the current cost of basic household necessities or differences in cost of living across specific geographies in the US. Depending on the median income in an area, people experiencing low income or very low income compared to other members of their local community may still have incomes that fall above the FPL, even though the local cost of living may exceed their income. Portland, and the other geographies listed above, fall into this category, and may benefit from using a multiple (e.g. 200%) of the FPL as a threshold. However, this threshold should be specific to local conditions, such as in Figure A-1, to ensure that the full focus population of benefit recipients can be eligible.

Another way to compare local income distributions is ALICE (Asset Limited, Income Constrained, Employed) methodology. This strategy uses a standardized set of measurements to quantify the cost of a basic household budget in each county of partner states. The ALICE Threshold represents the minimum income level necessary for survival for a household, and is derived from the ALICE Household Survival Budget—the bare minimum cost of household basics including housing, child care, food, transportation, technology, and health care, plus taxes and contingency equal to 10% of household budget. See Figure A-2 for the 2018 thresholds across Oregon counties.

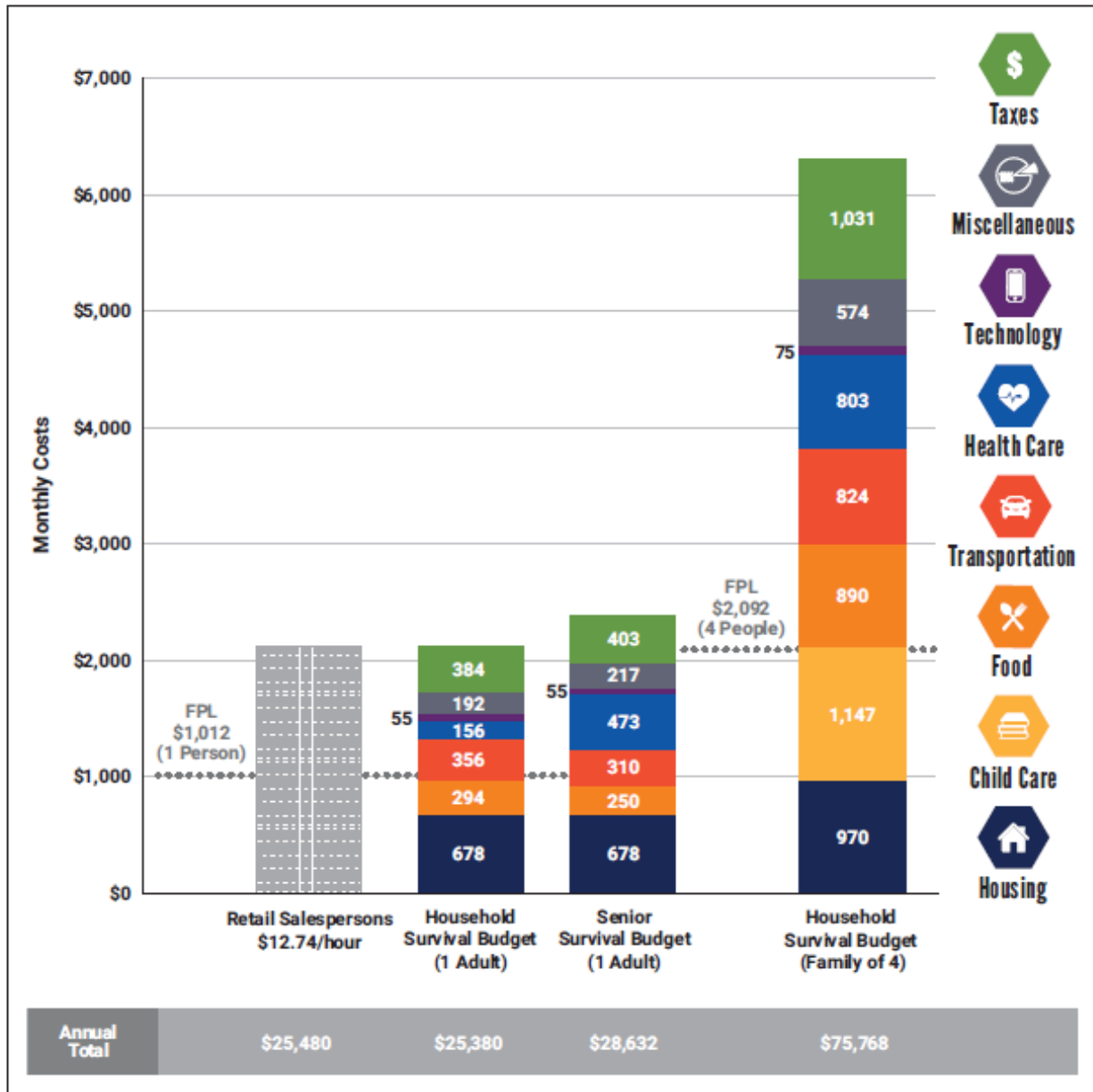
Draft Low-Income Toll Report: Options to Establish Toll Benefits for Drivers Experiencing Low Incomes

Table A-8 summarizes ALICE and FPL data for each geography noted above, with the exception of California where only FPL data is available.

Table A-8. ALICE and FPL Data for Each Geography

Data Type	ALICE (Asset Limited, Income Constrained, Employed)	Self-Sufficiency Standard for Oregon
Organization	United For ALICE	Worksystems
Organization Description	Driver of innovation, research, and action to improve life across the country for ALICE (Asset Limited, Income Constrained, Employed) and for all. Through the development of the ALICE measurements, a comprehensive, unbiased picture of financial hardship has emerged.	Non-profit agency that accelerates economic growth in the City of Portland, Multnomah and Washington counties by pursuing and investing resources to improve the quality of the workforce.
Update Frequency	Bi-annually	Annually (since 2020, every three years), though individual data sources depend on individual update frequency
Most Recent Update	2018	2021
Philosophy (i.e. what is it trying to accomplish?)	Based upon the highest quality, unbiased data we are able to measure financial hardship and understand why so many households struggle to make ends meet. Each ALICE report contains data on household budgets, demographics, employment opportunities, housing affordability, public and private assistance, and other critical economic factors.	Comprehensive, credible, user-friendly tool to ensure the best data and analyses are available to enable Oregon's families and individuals to make progress toward real economic security.
Methodology (i.e. what is it counting and how?)	Measure calculates how much income a family must earn to meet basic needs without private or public assistance, varying by family composition, which city or county they live in Oregon, and accounting for the need for emergency savings (10% contingency). Based on the costs of basic needs for working families: housing, child care, food, health care, transportation, miscellaneous items, the cost of taxes, and technology.	Measure calculates how much income a family must earn to meet basic needs without private or public assistance, varying by family composition, which city or county they live in Oregon, and accounting for the need for emergency savings. Based on the costs of basic needs for working families: housing, child care, food, health care, transportation, and miscellaneous items, and the cost of taxes and impacts of tax credits like the American Rescue Plan Act of 2021
Geographies	All counties in Arkansas, Connecticut, Delaware, Florida, Hawai'i, Idaho, Illinois, Indiana, Louisiana, Maryland, Michigan, Mississippi, New Jersey, New York, Ohio, Oregon, Pennsylvania, Tennessee, Texas, Virginia, Washington, West Virginia, and Wisconsin	All counties in Oregon, specific cities such as Portland; also, 41 states, the District of Columbia, and New York City
Website	https://www.unitedforalice.org/state-overview/Oregon	www.selfsufficiencystandard.org/Oregon
Data Availability	Excel file with ALICE data for all family types in every Oregon county	Excel file with Self-Sufficiency Standard data for all family types in every Oregon county
Use in other programs in Oregon	Only information for Pacific NW: Avista, Ford Family Foundation, Idaho Community Foundation, Idaho Nonprofit Center, Providence Health Care, WaFd Bank, WSECU, United Ways of the Pacific Northwest	Multnomah County Preschool for All program (qualification standard); Worksource Center Oregon (scholarship awards and to support service needs); Office of Forecasting, Research and Analysis for the State of Oregon (tax model impacts); Portland Development Commission ("prosperous households" measure)

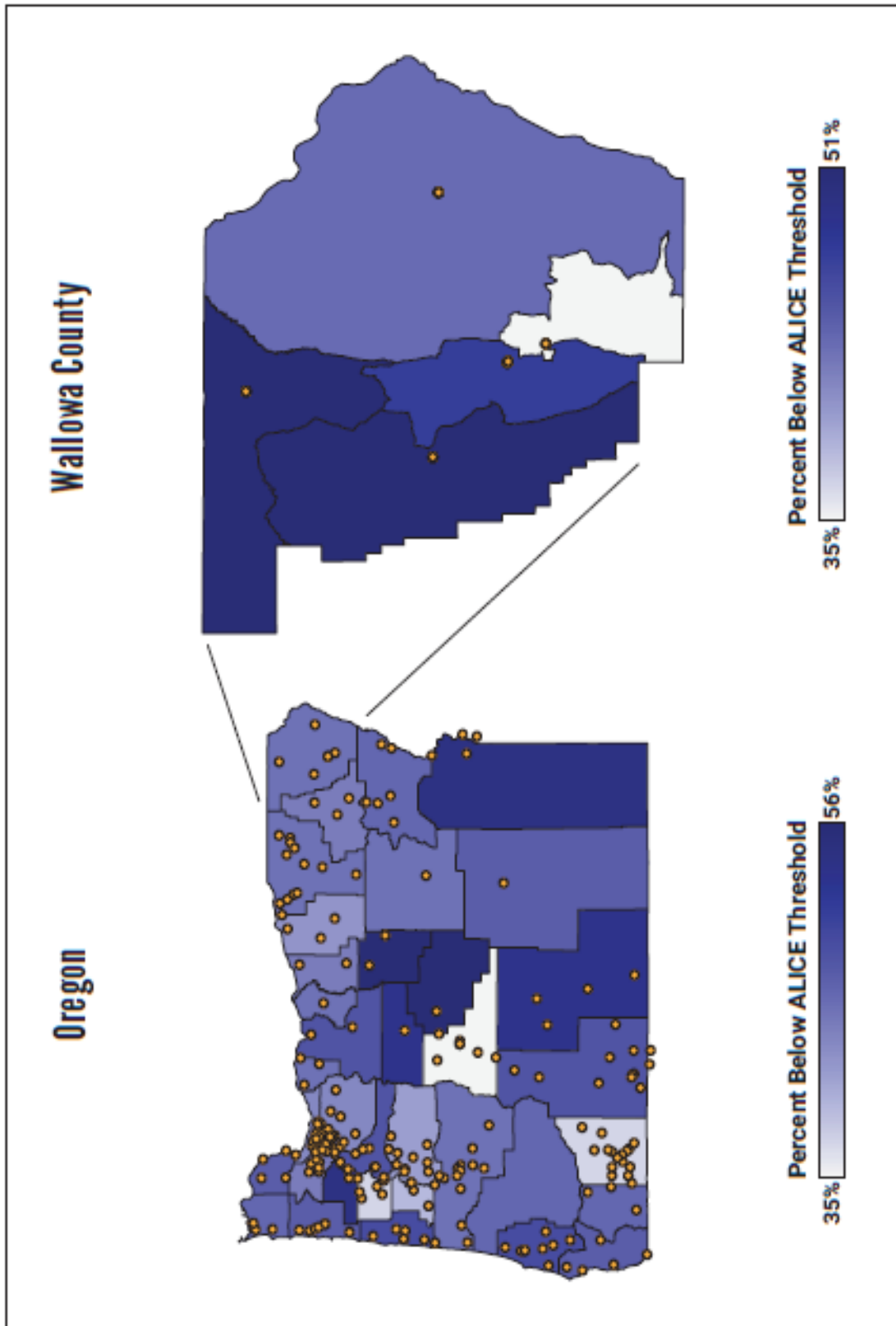
Figure A-1. Budget Comparison (Oregon 2018)



Note: The FPL is a total; there is no breakdown of how that amount is allocated by budget category.

Sources: AAA, 2018; Agency for Healthcare Research and Quality, 2018; American Community Survey, 2018; Bureau of Labor Statistics, 2018—Consumer Expenditure Surveys; Bureau of Labor Statistics, 2019—Consumer Expenditure Survey; Bureau of Labor Statistics, 2018—Occupational Employment Statistics; Centers for Medicare & Medicaid Services, 2016—Medicare Current Beneficiary Survey; Centers for Medicare & Medicaid Services, 2019; Centers for Medicare & Medicaid Services, 2019—Medicare - Chronic Conditions; Federal Highway Administration, 2017; Feeding America, 2019; Fowler, 2019; Grobe & Weber, 2018; Internal Revenue Service, 2020; Internal Revenue Service—FICA, 2020; Medicare.gov; Scarborough, 2018; The Zebra, 2018; U.S. Department of Agriculture, 2018—Official USDA Food Plans; U.S. Department of Housing and Urban Development, 2018—Fair Market Rents; Walczak, 2019. For more details, see the Methodology Overview at [UnitedEPA/LICE.org/Methodology](https://www.oregon.gov/OTD/Programs/Methodology)²⁴

Figure A-2. Library Locations and Household Below ALICE Threshold (Oregon 2018)



Sources: ALICE Threshold, 2018; American Community Survey, 2018; The Institute of Museum and Library Services, 2019

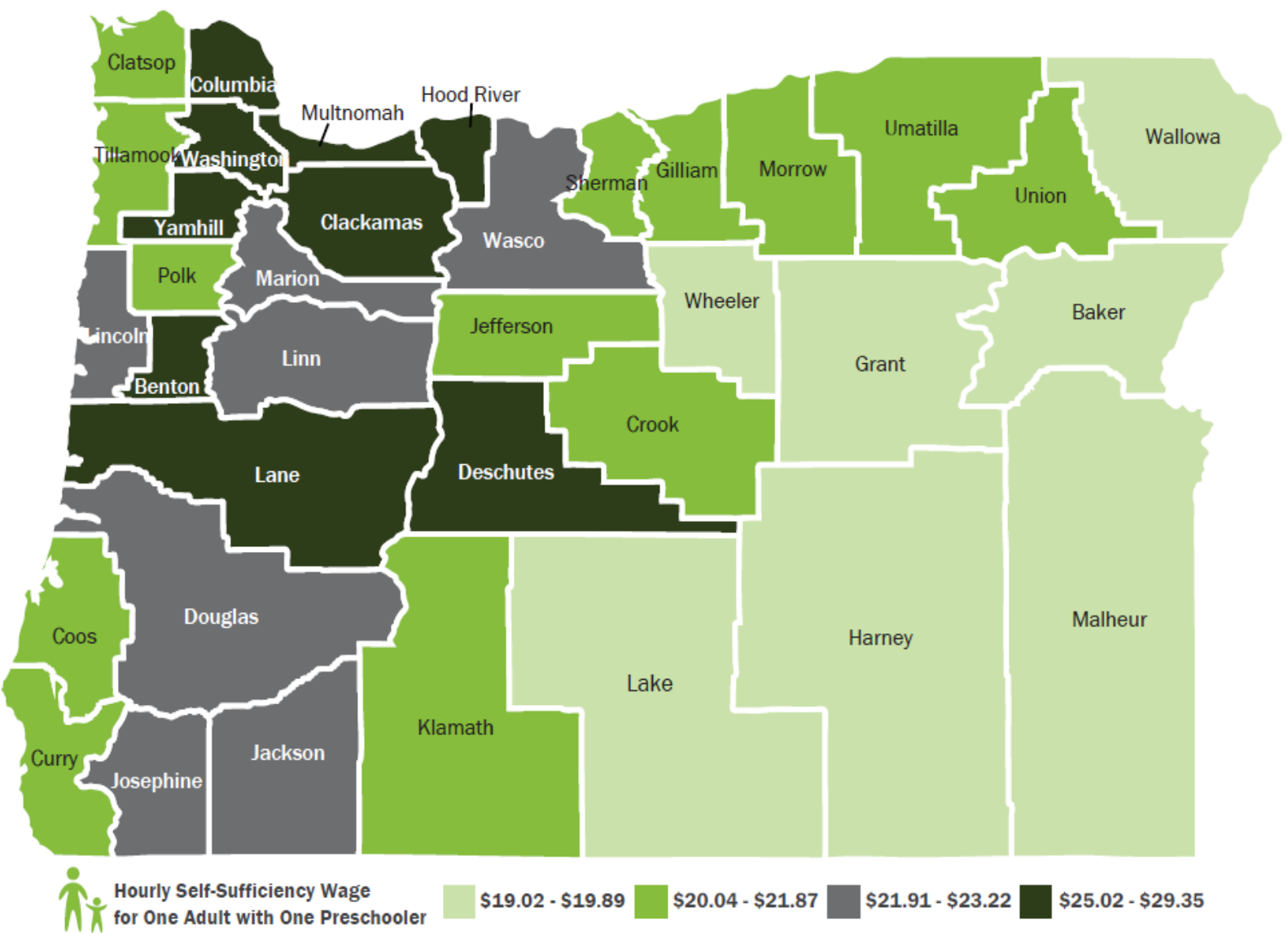
Figure A-3. The Self-Sufficiency Standard for Select Family Types (Multnomah County, Oregon 2021)

	1 ADULT	1 ADULT 1 PRESCHOOLER	1 ADULT 1 PRESCHOOLER 1 SCHOOL-AGE	2 ADULTS 1 PRESCHOOLER 1 SCHOOL-AGE
MONTHLY COSTS				
Housing	\$1,327	\$1,531	\$1,531	\$1,531
Child Care	\$0	\$1,258	\$2,081	\$2,081
Food	\$306	\$463	\$701	\$942
Transportation	\$100	\$100	\$100	\$200
Health Care Net	\$168	\$536	\$574	\$647
Premium	\$95	\$444	\$444	\$444
Out-of-Pocket	\$73	\$92	\$130	\$203
Miscellaneous	\$190	\$389	\$499	\$540
Taxes (Net)	\$535	\$793	\$924	\$930
Federal Income Taxes	\$173	\$397	\$590	\$540
Payroll Taxes	\$204	\$393	\$497	\$532
State Income Taxes	\$159	\$304	\$387	\$407
Federal Child Tax Credit (-)	\$0	(\$300)	(\$550)	(\$550)
SELF-SUFFICIENCY WAGE				
Hourly**	\$14.92	\$28.81	\$36.42	\$19.52 (per adult)
Monthly	\$2,627	\$5,070	\$6,409	\$6,871
Annual	\$31,521	\$60,846	\$76,912	\$82,447
Emergency Savings Fund	\$33	\$119	\$265	\$65
TOTAL RESOURCES (YEARLY)				
Federal & Oregon Earned Income Tax Credit (EITC)	\$0	\$0	\$0	\$0
Federal Child and Dependent Care Tax Credit (CDCTC)	\$0	\$4,000	\$8,000	\$8,000
Oregon Working Family Household and Dependent Care Credit (WFHDC)	\$0	\$0	\$0	\$0
Net Resources	\$31,521	\$64,846	\$84,912	\$90,447

* The Standard is calculated by adding expenses and taxes and subtracting tax credits.

** The hourly wage is calculated by dividing the monthly wage by 176 hours (8 hours per day times 22 days per month). The hourly wage for families with two adults represents the hourly wage that each adult would need to earn, while the monthly and annual wages represent both parents' wages combined. Note: Totals may not add exactly due to rounding.

Figure A-4. Counties by Level of Hourly Self-Sufficiency: One Adult and One Preschooler (Oregon 2021)



Appendix B Decision-Making Framework for Type of Discount

A decision-making framework was developed to help evaluate the options made in this draft report with regard to the type(s) of benefits to provide, the method of enrollment, and the selection of income criteria. The following options were evaluated:

- Percentage discount
- Credit for a specific number of free trips per month
- Monthly credit
- Fixed discount

For each option, 11 metrics were evaluated at a high level, and each of the 11 metrics was assigned a percentage weight, with the weights adding up to 100%. This allows the framework to generate a score for each option. The metrics and weights are shown in Table B-1.

Table B-1. Framework Metrics and Percentages

Metric	Weight
User benefit:	55%
The net monetary benefit per household for highway users experiencing low incomes	5%
The decrease in how regressive tolls are for highway users experiencing low incomes (tolls are regressive if everyone pays the same—those with lower incomes spend a higher percentage of their income on a fixed cost)	10%
Encouraging the free or very low cost availability of a reliable trip for infrequent high-value trips, such as medical or childcare	20%
The increase in the share of time savings accruing to highway users experiencing low incomes	10%
Lessening the burden to highway users experiencing low incomes due to account minimums and automatic reloading events	10%
Program cost:	20%
Reduction in total toll payments as a result of the program	10%
Cost of program implementation (excl. toll impact and incl. temporary or permanent staff needs for enrollment)	5%
Ease of program implementation for implementing agency(s)	5%
Operational impact:	10%
Operational impact, including eroding travel time and environmental benefits of pricing	10%
Other feasibility:	15%
Easily explained to decision-making stakeholders and eventual program participants	10%
Are the stakeholders (legislature, implementing agencies, etc.) willing to support this option?	5%

Draft Low-Income Toll Report: Options to Establish Toll Benefits for Drivers Experiencing Low Incomes

The framework is designed to allow iteration based on feedback from stakeholders and outreach on the importance of different metrics, as well as the score of each option on each metric. Some high-level ideas that drove the initially selected scores include:

- It is anticipated the self-certification will increase enrollment in the program.
- People experiencing low incomes have a diverse set of travel needs, and their commute trips tend to be more broadly distributed at all hours of day, as opposed to being confined to the peaks.
- A credit or free trips option (as opposed to a discount) diminishes the burden of credit or debit card requirements, minimum account balances, and automatic reloading events.
- A multi-tier eligibility threshold makes tolling less regressive, but it requires additional explanation, is harder to understand for program users, and is costlier to implement. Stakeholders have emphasized the benefits of both options: that simplicity is critical, but as is acknowledging the different travel and budget needs of people experiencing very low incomes as opposed to people experiencing moderately low incomes.
- Given the early stage of the Oregon Toll Program, all discount options appear equally feasible from a tolling back-office perspective. Self-certification is much simpler for the implementing agency than a verification option.
- Percentage discounts and free trips incentivize traveling the in peak periods, whereas free trips and fixed discounts incentivize traveling in off-peak periods, and as such have lower operational impacts, but also less impact on making the time-saving distribution more equitable.
- Percentage discounts are easiest to understand and track, for program participants, but have other disadvantages.
- Stakeholders have been broadly supportive of percentage discounts, credits, and a fixed number of free trips.

The results of the framework are shown in full in Table B-2 and indicate that:

- Providing a recurring credit or a recurring number of free trips provides the greatest combined value, followed by a percentage discount.
- Self-certification on balance is more effective than actively verifying income on enrollment.
- Both one-tier and multi-tier options work well, with a slight edge to multi-tier program versions.

Table B-2. Framework Results

Discount Option	Enrollment	Tiered	Weight -->					55%	10%	5%	5%	20%	10%	5%	15%		
			100%	A1	A2	B1	B3									D2	Cost
% Discount	Self-Certification	One-tier	5.0	2	5	2	4	1	2.7	8	8	7	7.8	6.0	10	7	9.0
		Multi-tier	5.3	4	8	3	6	3	4.5	6	8	7	6.8	4.0	7	7	7.0
	Confirmed Eligibility	One-tier	3.6	1	3	1	2	1	1.4	9	3	3	6.0	8.0	5	7	5.7
		Multi-tier	3.7	2	4	2	3	2	2.3	8	2	3	5.3	7.0	4	7	4.7
# Free Trips	Self-Certification	One-tier	6.1	5	5	8	8	6	6.8	5	6	7	5.8	2.0	6	7	6.3
		Multi-tier	6.2	7	8	8	8	8	7.9	3	6	7	4.8	2.0	3	7	4.3
	Confirmed Eligibility	One-tier	4.1	3	3	4	4	3	3.4	8	2	3	5.0	6.0	3	7	4.3
		Multi-tier	4.1	4	4	4	4	4	4.0	7	1	3	4.3	6.0	2	7	3.3
Monthly \$ Credit	Self-Certification	One-tier	5.7	6	5	8	6	5	6.4	4	6	7	5.3	4.0	4	7	5.0
		Multi-tier	5.8	8	8	8	6	7	7.5	2	6	7	4.3	4.0	1	7	3.0
	Confirmed Eligibility	One-tier	4.0	3	3	4	3	3	3.2	7	2	3	4.8	7.0	2	7	3.7
		Multi-tier	4.0	4	4	4	3	4	3.7	6	1	3	4.0	7.0	1	7	2.7
Fixed discount	Self-Certification	One-tier	4.7	2	5	2	2	1	2.4	8	8	7	7.8	8.0	8	4	6.7
		Multi-tier	5.0	4	8	3	4	3	4.2	6	8	7	6.8	6.0	5	4	4.7
	Confirmed Eligibility	One-tier	3.4	1	3	1	1	1	1.2	9	3	3	6.0	9.0	4	4	4.0
		Multi-tier	3.5	2	4	2	2	2	2.1	8	2	3	5.3	8.0	3	4	3.0

Note: Blue numbers are formulas

Appendix C Regional Mobility Pricing Project 2022 Spring Engagement Summary

Materials following this page were distributed at the meeting.



MULTNOMAH COUNTY

SUPPORTIVE HOUSING SERVICES PROGRAM

Quarter 3 Update

May 2022

Acknowledgment Page

We take this opportunity to thank the original caretakers of this land. Multnomah County is located on the ancestral homelands of the Multnomah, Kathlamet, Clackamas, Tumwater, Watlala bands of the Chinook, the Tualatin, Kalapuya, Wasco, Cowlitz, Molalla, and other indigenous nations of the Columbia River.

We honor and acknowledge the houseless community's experience, voice, and labor provided to inform our practices and efforts. We stand together as a community in solidarity for a better future for us all.

The unified efforts from METRO, Washington and Clackamas Counties and cross-departmental partners along with the following community-based organizations provided essential support to the Joint Office of Homeless Services to support our shared vision of Multnomah County's Metro Supportive Housing Services Local Implementation Plan:



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Executive Summary

We are experiencing a great deal of momentum in the implementation of METRO Supportive Housing Services programming. We are excited to present third quarter data that demonstrates an increase in service delivery and housing placement. The increased capacity these funds provide for our homelessness services system has resulted in hundreds more people being offered housing and shelter in Multnomah County.

These funds are making a difference in people's lives. In Q3, the Joint Office doubled the number of people moving into permanent housing. This was due in large part to the foundational work that was laid out in Q1 and Q2. Overall, between Q1-Q3 there have been 500 people newly placed into housing and 400 people searching for housing.

There is strategic coordination across all ending homelessness initiatives to support people in obtaining permanent housing. As an example of this, of the 500 housing placements between Q1-Q3, 89 of those placements were leveraged with Emergency Housing Vouchers.

The Joint Office is also being strategic in planning for and investing in our emergency shelter system, which has expanded during the COVID-19 pandemic. In Q3, JOHS finalized a shelter set-aside program in partnership with the City of Portland. This program fast-tracks people camping outside to an immediate shelter bed. JOHS also acquired a motel in Gateway that now offers 137 rooms of emergency shelter. As of Q3, there were 260 people newly enrolled in SHS funded emergency shelters.

Acknowledging that racism is a primary driver of homelessness, our Board of Commissioners-approved Local Implementation Plan centers racial equity by focusing support on Black, Indigenous, Latino/a/x, Asian, Pacific Islander, and other people of color who are disproportionately impacted by homelessness. In Q3, we continued to develop the data structures needed with this new funding source, to ensure that decision-making and evaluation is data-driven. JOHS captured more data in the Homelessness Management Information System (HMIS) while reducing manual data collection by 30% this quarter. This increase in HMIS data entry by our community-based provider partners allows JOHS to do further analysis while disaggregating data by race and ethnicity to ensure the LIP's racial equity goals are met.

JOHS continues to stay committed to the plan's equity goals. To support this, JOHS participated in a Tri-County SHS Request for Programmatic Qualifications (RFPQ) with Washington and Clackamas Counties. In Q3, a new qualified vendor pool was established to partner with additional culturally specific organizations who are uniquely positioned and have trust and relationships in and with communities of color.

In Q3, JOHS also underwent a recruitment process to identify community members to serve on the SHS Advisory Committee to advise JOHS on Multnomah County's implementation of SHS. There is a strong commitment to operationalize equity on this committee and elevate the role of people with lived experience and the BIPOC community in the advisory process.

We are at a critical juncture, with members of our community still impacted by systems of oppression layered with the ongoing economic, health and trauma impacts of COVID-19. The SHS funds are playing a pivotal role in supporting the development of an equitable homelessness services system that provides a full continuum of interventions including street outreach, emergency shelter, transitional recovery housing, permanent housing placement via rapid rehousing, permanent supportive housing, and prevention/diversion strategies.

As detailed below in this report, the SHS funds allows for expansion and an opportunity to meet the pressing needs of the community. The SHS funds are supporting hundreds of people to obtain permanent housing, funding alternative shelter beds, expanding employment programs, providing additional capacity for street outreach and preventing thousands of people from entering homelessness.

Programming¹

In Q3, the project-based housing programs Cedar Commons and Renaissance Commons both experienced almost total lease-up of their SHS-supported apartments. This resulted in 67 more people placed this quarter. The significant increase was the culmination of housing referral, search and placement work that had taken place all year.

The placement out of shelter programs assisted 32 people move into an apartment, and staff are actively working with 103 people who are in the housing search phase. These programs were all new in FY22. After spending the first two quarters in the development and hiring process, these programs are now up and running, helping people end their homelessness and creating additional shelter capacity by increasing the turnover of the beds and rooms we already fund.

In Q3, the Emergency Housing Voucher program (EHV) went from 9 housing placements to 67, this was over a 300% increase in the placement outcome. This increase in placements is the result of enrollment and housing search work that took place in the previous quarters.

The ramp-up phase for new SHS funded programs is characterized by a large increase in the number of newly enrolled people into a given program. The increased enrollment is correlated with an increase in housing placements or service encounters within a given quarter.

Many SHS programs are new and have required time to fully implement as community-based organizations finalize their ramp-up phases. Programs that are working to ramp up enrollment, as well as their outcomes in housing placement, are:

- finalizing the referral process for their program
- finalizing the hiring and training of new staff members
- identifying gaps in service delivery and applying an intervention to course-correct

Q3 was very successful through the hard work of our community-based organizations. In one quarter, they achieved more than a 60% increase in newly enrolled people searching for housing and a 50% increase in the number of people able to move into housing.² Appendix A contains the corresponding programming appendix with all of the funded SHS programs.

Cross-Departmental Coordination

In Q3, a cross-departmental team working with JOHS became fully staffed with three senior program specialists: one in the Director's office of the Department of County Human Services (DCHS), one in the Behavioral Health Division (BHD) of the Health Department, and one in the

¹ A quick note on SHS programming categories – over the Q1 and Q2 reports, JOHS has continued to refine how to best categorize our programs. This has changed somewhat between each reporting period. Below there are changes in categorization between Q2 and Q3, and those changes are also reflected in the updated programming appendix.

² Some of this increase is likely due to improved data collection practices that were implemented in Q3.

Department of Community Justice (DCJ). In addition, we added a data analyst to support cross-departmental data sharing.

This cohort meets weekly and also participates in a bi-weekly countywide SHS workgroup facilitated by JOHS. In Q3, this group:

- worked on an internal inventory of every housing project in the County that serves people experiencing homelessness
- developed new programming proposals for SHS funds
- started initial planning to increase integration of the Coordinated Access assessment tool in other County departments
- reviewed all of the SHS-funded permanent housing programs
- launched an inter-departmental SCoPE workgroup that will focus on service alignment between departments
- reviewed the SHS-funded Regional Long-Term Rent Assistance program and the current RLRA investments in the Behavioral Health Division

Systemic Barriers to Service Expansion

This report demonstrates continued progress toward our Year 1 implementation goals. Some programs, however, have not been able to build capacity as quickly as originally projected. This is due largely to headwinds that are affecting the entire human services sector.

Our non-profit community partners continue to report significant challenges both hiring and retaining direct service workers. Some of this is due to pay and working conditions, both of which we are using SHS funds to help address (see Equity Investments [p.13]). Some appears to be due to the ongoing impacts of COVID-19 on people who are asked to do participant-facing work, and their families.

These challenges affect all aspects of SHS-funded programming, including outreach, shelter, housing placement, and permanent supportive housing programming. Regarding project-based permanent supportive housing expansion, we are seeing delays in construction due to supply chain issues that will impact the expected timelines. JOHS is continuing to monitor and work with our partners to adjust strategies to address these impacts to the extent possible.

Supportive Housing

In the LIP, JOHS identified that the highest priority goal for the SHS funding is to create an additional 2,235 permanent supportive housing opportunities as quickly as possible in Multnomah County. Through Q3, there were 204 additional supportive housing placements. Additionally, there are also 500 permanent support housing apartments coming online by the end of Fiscal Year 2024.

PROJECT-BASED SUPPORTIVE HOUSING HIGHLIGHTS

As described earlier in this report, Cedar Commons and Renaissance Commons placed a total of 67 households. Both programs almost completely leased up in Q3, with Cedar Commons leasing 39 of its 40 SHS-funded apartments and Renaissance Commons leasing up 28 of its 30 SHS-funded apartments. A third program, Nesika Illahee, fully leased up all 10 apartments in Q3. Below is a description of some of these programs.

The Cedar Commons PSH Program in East Portland

Cedar Commons is a new affordable housing development by Related Northwest, Central City Concern, and the Portland Housing Bureau. The building is located in the Powellhurst-Gilbert neighborhood and has 60 affordable apartments targeted to people exiting homelessness. 40 of the apartments are for Permanent Supportive Housing (PSH), all of which are subsidized using SHS funds for long-term rent assistance; 10 of these are specifically set aside for people that experience a severe mental health disability.

The Renaissance Commons PSH Program in North Portland

The Renaissance Commons project is a newly constructed, 189-unit multifamily rental project developed by REACH CDC in the Kenton neighborhood. It consists of two buildings near N. Argyle Street and Interstate Avenue. The buildings have apartments ranging in size from studios to three-bedrooms. JOHS has invested SHS funds to pay for long-term rent assistance in 30 apartments that are targeted to people exiting homelessness.

The Nesika Illahee PSH Program in Northeast Portland

Nesika Illahee is a collaboration between the Native American Youth and Family Center (NAYA), the Native American Rehabilitation Association of the Northwest (NARA NW), Community Development Partners (CDP), and the Confederated Tribes of Siletz Indians (Siletz). The new building creates 59 affordable apartments in Northeast Portland's Cully Neighborhood. JOHS has invested SHS funds to pay for long-term rent assistance to support 10 of the 59 apartments. The SHS-funded apartments are dedicated to people exiting homelessness.

TENANT-BASED SUPPORTIVE HOUSING HIGHLIGHTS

Over the first three quarters, 5 new tenant-based PSH projects launched with SHS, with the capacity to serve 275 households. Unlike project-based PSH, which funds specific apartments in specific buildings, tenant-based PSH provides rent assistance and support services to people who move into market apartments. These programs have thus far housed 80 people with 27 people currently enrolled and searching for apartments.

Two critical programs that launched in Q3 are: (1) the Umoja Timu Project and (2) the Intensive Case Management program that is modeled on the success of the ACT program. While these programs continue to be in the development phase, or are just ramping up, we already see the transformative impact that housing can have for people who have experienced chronic homelessness. In Q3, the Assertive Community Treatment program, which specializes in

behavioral health and substance use services, helped move 19 people directly from the streets into permanent housing.

Permanent Supportive Housing is the most effective intervention to significantly decrease chronic homelessness. It is an evidence-based practice that continues to be successful locally when we have enough affordable apartments to move people into and can couple that with the services to support people in their new homes. Permanent Supportive Housing is making a large impact supporting Multnomah County's most vulnerable, including people with extremely low incomes, who have a disability, and who have experienced chronic homelessness. JOHS will continue to partner to bring more Permanent Supportive Housing opportunities to the community.

System Access & Navigation

System Access & Navigation programs are designed to provide services that can aid households experiencing homelessness as they navigate to resources including shelter, housing, case management and medical assistance. Interventions include shelter inreach, housing navigation, and urgent behavioral health street engagement. SHS funded four System Access & Navigation programs. Through Q3, there has been steady implementation of the different outreach and navigation teams.

The Family System Mobile Housing and Navigation Team that was launched leveraging SHS funds engages and assesses families experiencing homelessness for housing resources. This team provides street- and site-based outreach/inreach and engagement, coordinated access assessment, resource navigation and referrals, documentation collection, and rental housing barrier mitigation. It also provides flexible participant financial assistance to support people prioritized through Coordinated Access to available housing resources. As of Q3, over 700 families have received navigation services through these investments.

A program component added to the Adult Coordinated Entry system to include culturally specific services is fully staffed and is conducting intentional outreach in communities of color. This team is a collaboration between two local, culturally specific community-based organizations, and will provide mobile housing assessments to 200 households each year and provide culturally specific housing readiness navigation services to 50 households.

SHS investments also launched the Barrier Mitigation program to connect people to attorneys to help identify and remove barriers to obtaining permanent housing. Services include expungement, felony reduction, reducing court fines and fees, correcting the legal record, warrant resolutions, driver's license reinstatement, appealing housing denials and reasonable accommodation denials in connection with criminal records, and various other civil legal services. As of Q3, 83 people were assisted with legal services and 216 legal services were performed (expungements, landlord/tenant debt negotiation, fine & fee waivers, etc.)

Housing Placement & Retention

Overall, the outcomes from the permanent housing programs demonstrate a steady ramp up with increased numbers of newly enrolled people as well as people exiting homelessness and moving back into permanent housing. Since enrollment precedes housing placement, increases in enrollment in Q3 indicate that there will be an increase in housing placement in Q4.

HOUSING PLACEMENT HIGHLIGHTS

The three programs described in this section have each increased both housing placements and the number of people newly enrolled in the housing search phase.

Emergency Housing Vouchers

The Joint Office is contracted with 13 community organizations to deploy 476 emergency housing vouchers (EHV). Of those 476, 300 leverage SHS funds to provide housing retention supports. This is described in more detail in the Q2 report. Between Q1-Q3, there were over 150 referrals and 89 housing placements. There are 359 EHV's in the process of leasing up in the community. The significant increase in placement indicates that the program is in a successful ramp up phase and will likely continue to have larger placement numbers as our community moves to full deployment of all the allocated EHV.

Assertive Engagement Case Management

The Assertive Engagement case management program supports the Homeless Youth Continuum (HYC). Overall, accounting for all funding sources, the HYC has supported 440 people moving into permanent housing since the beginning of Q1. All of the funding streams for this system are braided together to leverage the dollars to maximize program outcomes. This year, SHS funding contributed to 20% of the permanent housing placements – 88 people through Q3. Almost half of those placements came in Q3, when SHS-funded assertive engagement workers supported 40 youth in exiting homelessness and moving back into permanent housing. This is the highest number of placements for the entire youth system in a quarter this year, and is consistent with a successful program ramp up.

Placement Out of Shelter

The Placement Out of Shelter program was expanded in Q3 with the addition of a new behavioral-health-focused placement team. While this new program team is still in development, our office estimates it will begin enrolling and placing people into permanent housing in Q4. Overall, five community-based organizations are part of this intervention. Since Q1, this program has supported a total of 32 people in moving back into permanent housing and is working with 103 people who are actively searching for housing.

Housing placement programs newly launched in FY 22 continue to build toward full capacity and increase their housing placement work. Programs expanded with SHS funding are increasing placements. Between Q1-Q3, SHS funds supported the placement of 500 people into permanent housing, with 400 additional people in the search process. The Joint Office anticipates an increase in housing placement outcomes in Q4.

Prevention & Diversion

Multnomah County's Rapid Response Eviction Prevention Program launched at the beginning of this fiscal year in an effort to adapt to the rapidly changing rental landscape and to prevent the trauma that comes from being displaced from your home. Supporting this new program aligns with the LIP's goal to prevent 1,000 households from entering homelessness each year. This is a partnership between Multnomah County, the Portland Housing Bureau, legal assistance providers and community-based organizations.

The Joint Office has continued to invest in expanding the capacity of 211 Info (211), a community-based nonprofit organization that helps people identify, navigate and connect with local social services resources, including legal support. By the end of Q3, 211 had referred over 150 households who had eviction notices to the Oregon Law Center to receive legal services to prevent evictions.

JOHS has also continued to fund increased staff capacity, primarily in culturally specific organizations, to ensure that millions of dollars in federal rental assistance reaches households at risk of falling into homelessness due to the ongoing economic impacts of COVID-19.

This community-based approach for delivering rent assistance leverages existing systems and relationships. Currently, 43 partner organizations across the four systems of care (adult, family, youth, and domestic violence) provide rent assistance and support services in our community. JOHS has allocated SHS funds to contract with 12 of the 43 organizations to disburse emergency rent assistance to community members across Multnomah County. As of Q3, the community-based organizations receiving SHS funds served 2,490 people to help them retain housing.

Safety On and Off the Streets

In Q3, JOHS continued to see an overall expansion of both outreach and shelter capacity, including capacity supported by SHS funding. Three community-based organizations continue to hire newly funded navigation workers, including workers who have lived experience with homelessness and behavioral health challenges. In Q3, JOHS developed a shelter bed set-aside partnership to help navigation workers and public space management agencies at the City of Portland to connect people to emergency shelter opportunities.

Along with the new navigation workers funded through SHS, a behavioral health community-based organization is adding three additional outreach workers to respond to behavioral health related calls from public space management agencies. Through Q3, the SHS-funded Health Department PATH team, which helps people experiencing homelessness receive treatment for substance use disorders, served 190 people.

SHS funds are allocated to support operations at a number of emergency shelters representing 160 beds, including shelters added this fiscal year such as Beacon Village and Arbor Lodge.

In addition, during this quarter, a newly acquired motel in Gateway opened, offering 137 rooms for emergency shelter.

A previously acquired motel site (not funded with SHS) will transition into an SHS-funded motel shelter program for people with severe and persistent mental illness, operated by the County's Behavioral Health Division in partnership with New Narratives. That program is scheduled to launch in Q4.

JOHS also continues to pursue multiple new congregate, motel and alternative shelter projects that will use SHS funding for acquisition, renovation and/or operations. JOHS continues to see a need for COVID-19 motel shelters as cases remain at high levels in Multnomah County, creating challenges for congregate shelter programs to provide on site isolation options for people who have contracted COVID-19 or for people who are medically vulnerable when outbreaks occur.

In addition to outreach and shelter, SHS funds continue to support public space cleaning and access to hygiene services, partnering with programs that employ people experiencing or who have recently experienced homelessness. Through Q3, 32 people who experienced homelessness were employed.

These low-barrier employment programs have continued to ramp up, resulting in an increasing number of participants. Partner programs include Central City Concern's Clean Start program and their Community Volunteer Corps, as well as Cultivate Initiatives' Workforce Cleaning Brigade. One new program that is under development is a limited-time employment opportunity with Street Roots to conduct Fire Outreach during the upcoming wildfire season.

Planning

In Q3, JOHS began recruiting for a new SHS Advisory Committee specifically dedicated to advising on Multnomah County's implementation of SHS, with membership as set out in the measure, and an emphasis on elevating the role of people with lived experience and the BIPOC community in the advisory process. This body replaces some functions of A Home for Everyone's Coordinating Board, which had served as JOHS' initial SHS advisory body.

Equity Investments

JOHS recognizes that the disparities in our communities today are rooted in the structural racism that is embedded in our society. The Multnomah County Local Implementation Plan is committed to intentional planning that includes those who are most impacted, developing future-forward practices and structures that offer a vision for true transformation to achieve racial equity. In Q3, JOHS continued to ensure that our data includes demographic information so that we are measurably meeting our goals, and investing in front-line workers who disproportionately are BIPOC and who are critical to the effective delivery of culturally specific and responsive services.

Tri-County Request for Programmatic Qualifications

Clackamas, Multnomah and Washington Counties came together and designed a Tri-County procurement process for Supportive Housing Services. The three Counties worked together to align the procurement process and the design of the service categories with a strong commitment to qualify culturally specific community-based organizations to contract for Supportive Housing Services. More than 100 organizations qualified for the Supplier Pool through the Tri-County SHS Request for Programmatic Qualifications (RFPQ). The number of community-based organizations supported by JOHS to do their work has increased significantly due to this RFPQ. During Q3, JOHS started planning how to integrate additional organizations into its systems of care.

Data Disaggregation

Data-driven decision-making and evaluation focused on equity are core objectives in the LIP. In order to do this, we need to know who is being served in which programs. JOHS has kept this goal central as we build data structures. All data collected in HMIS allows for disaggregation by race and ethnicity, among other important demographic information, to better understand how well our programs are serving BIPOC populations. We are continuing to work on systems to ensure we collect this data while still prioritizing the provision of services.

Through Q3, 40% of households served in SHS-funded shelters identified as BIPOC. In the homelessness prevention program, 83% of households identified as BIPOC. Additionally, 45% of households placed into housing with SHS funds identified as BIPOC, with 20% identifying as Non-Hispanic/White (this includes only the data from community-based organizations that were able to provide disaggregated demographic data)³. See Appendix B: Quarterly Outcomes Report for more detailed data.

New Coordinated Access Assessment Tools

JOHS has continued its work with two consultants, Focus Strategies and C4, to revise the Coordinated Access process and create a new assessment tool to be more responsive, effective and culturally appropriate. In Q3, C4 engaged with community-based organizations and with people who have lived experience of homelessness in a culturally responsive and culturally-specific feedback process. They held four group feedback sessions, two in each the adult and family systems, and have conducted multiple one-on-one sessions with participants who could not attend group sessions. They also held feedback sessions with community-based organizations in the adult and family systems that directly provide Coordinated Access services. People with lived experience of homelessness and people with marginalized identities, particularly BIPOC people, were prioritized in these sessions as well. C4 and Focus Strategies

³ Some of this data was collected outside of the Homeless Information Management System (HMIS). When that occurs, JOHS is unable to disaggregate race and ethnicity data. Non-HMIS data is added to the 'Race/Ethnicity Unreported' category. We continue to improve the data capture of these programs by building capacity for data entry and reducing data entry lag.

plan to use this feedback to develop an initial draft of new assessment and prioritization questions and policies in Q4.

Wage Study

During Q3, JOHS continued working with Homebase Consulting on a compensation, classification and benefits study (“wage study”) of its contracted community-based organizations. This study will inform our efforts to address homelessness by supporting a resilient and sustainable workforce. During Q3, the wage study team drafted study design and data collection tools to collect quantitative and qualitative data on wages, benefits, incentives and non-monetary strategies currently used by our contracted providers. The team held information sessions for study participants and stakeholders to encourage participation and to fine-tune the data collection tools. Data collection will be underway by the end of Q4.

System Investments & Data Management

Program System Expansion

JOHS continued to build its internal capacity to support the significant expansion of community-based services. This growth requires program management to support the continuum of homeless services in a coordinated and effective manner. In the third quarter, six team members were added across multiple work sectors, including Program Data, Data Team, Evaluation, Communications and Human Resources to ensure that SHS programming is adequately supported.

Data Development

JOHS continues to work on improving its data reporting capacity and data quality initiatives. During Q3, JOHS focused its efforts on key data development needs:

- Hiring and training internal data analyst and technical positions to ensure timely data reporting and analysis.
- Finalizing a contract with Wellsky, our region’s HMIS vendor, and as part of planning for taking over as the lead Tri-County administrator of HMIS.
- Drafting design of data dashboards and active reports that will allow for maximum transparency on progress toward systemwide and SHS-specific outcomes.

Built for Zero

JOHS continues work toward Built for Zero (BfZ) implementation and the achievement of a “Quality By-Name List,” supporting other by-name lists of adults and other populations already in use by JOHS.

Progress on BfZ requires adding capacity and resilience to JOHS' existing and expanding outreach teams. During Q3, work focused on policies and procedures necessary to expand and map outreach teams, and ensure outreach coordination, and the development of tools and workflows to allow outreach teams to collect data during their work, with an eye towards trauma informed practices and maintaining positive relationships.

JOHS' data team also continued working with BfZ staff to map our data to their system and upload reports to identify data system gaps. The goal of BfZ is to work toward measurably ending homelessness for all, by strengthening data-driven systems that can support programs and processes designed for the continuous reduction of homelessness. The initial target population for this work in Portland, Gresham and Multnomah County is single adults experiencing chronic homelessness, who, by definition, can be in shelters or without shelter.

Appendices

Appendix A: FY22 Program Table

Supportive Housing

Program	SHS Capacity	Program Launched	Population A,B,Both	Culturally Specific
Breitung Building	28 apts	✓	A	--
Do Good Multnomah		✓		--
Cedar Commons	40 apts	✓	A	--
Central City Concern		✓		--
Home Forward		✓		--
Crescent Court	7 apts	--	A	--
Central City Concern		--		--
Home Forward		--		--
The Ellington	20 apts	✓	A	--
El Programa Hispano Catolico		✓		✓
Home Forward		✓		--
Findley Commons	35 apts	✓	A	--
Do Good Multnomah		✓		--
Home Forward		✓		--
The Hayu Tilixam Building	9 apts	--	A	✓
NARA		--		✓
NAYA		--		✓
The Henry Building	15 apts	✓	A	--
Central City Concern		✓		--
Nesika Illahee	10 apts	✓	A	✓
NARA		✓		✓
Renaissance Commons	30 apts	✓	A	--
Home Forward		✓		--
REACH CDC		✓		--
Urban League of Portland		✓		✓
The Vibrant Building	20 apts	✓	Both	--
Innovative Housing Inc		✓		--
ACT Long-Term Rent Assistance	100 apts	✓	A	--
Cascadia Behavioral HealthCare Inc (FACT)		✓		--

Supportive Housing (Continued)

Program	SHS Capacity	Program Launched	Population A,B,Both	Culturally Specific
Central City Concern (ACT)		✓		--
Home Forward		✓		--
NARA (ACT) (Totem Lodge)		✓		✓
Outside In		✓		--
Telecare		✓		--
NEW Intensive Case Management (ICM) Long-Term Rent Assistance	50 apts	--	A	--
Cascadia Behavioral Healthcare		✓		
Central City Concern		✓		
Lifeworks NW		✓		
Elder/Senior Long-Term Rent Assistance	115 apts	✓	A	--
NARA		✓		✓
Northwest Pilot Project		✓		--
Umoja Timu Project	30 apts	--	A	✓
The Urban League of Portland		--		✓
Youth Long-Term Rent Assistance	30 apts	✓	A	--
New Avenues for Youth Inc		✓		--

System Access & Navigation

Program	SHS Engagement Capacity	Program Launched	Population A,B,Both	Culturally Specific
Adult System Navigation Team Expansion	1,500	✓	A	--
Cascadia Behavioral Healthcare - BH focus		✓		--
Mental Health Association of Oregon		✓		--
Barrier Mitigation	340	✓	Both	--
Metropolitan Public Defenders Services Inc		✓		--
Culturally Specific CHAT 'BIPOC Collaborative'	200	✓	A	✓
El Programa Hispano Catolico		✓		✓
Urban League of Portland		✓		✓
Promoting Access to Hope (PATH)	--	✓	A	--
Multnomah County Behavioral Health Division		✓		--

Prevention & Diversion

Program	SHS Engagement Capacity	Program Launched	Population A,B,Both	Culturally Specific
Justice-Involved Rent Assistance	300 ppl	--	A	--
Department of Community Justice		--		--
Emergency Rent Assistance Program (ERAP)	--	✓	Both	--
Cascade Aids Project		✓		--
Cascadia Behavioral Healthcare Inc		✓		--
El Programa Hispano Catolico		✓		✓
Human Solutions Inc		✓		--
IRCO		✓		✓
JOIN		✓		--
Latino Network		✓		✓
NAYA		✓		✓
NARA		✓		✓
Self Enhancement Inc		✓		✓
Transitions Projects		✓		--
Urban League of Portland		✓		✓
Worksystems		✓		--
Eviction Prevention	2,800	✓	Both	--
211 Info Inc		✓		--
Oregon Law Center		✓		--

Safety Off and On the Streets

Program	SHS Engagement Capacity	Program Launched	Population A,B,Both	Culturally Specific
Emergency Shelter	283	✓	A	--
Arbor Lodge		✓	A	--
Beacon Village		✓	A	--
Barbur Inn		✓	A	--
Cypress Inn		✓	A	--
Motel 6		✓	A	--
Portland Pensione		✓	A	--
Golden Knight		✓	A	--
East Multnomah County Shelter ⁴		--	A	--

⁴ East Multnomah County shelter is still in the planning phase.

Safety Off and On the Streets (Continued)

Program	SHS Engagement Capacity	Program Launched	Population A,B,Both	Culturally Specific
Employment Programs	--	✓	A	--
Clean Start - CCC		✓	A	--
Community Volunteer Corps - CCC		✓	A	--
Workforce Cleaning Brigade		✓	A	--
Fire Outreach - Street Roots		--	A	--
Mobile Shower & Hygiene	--	✓	A	--
Cultivate Initiatives		✓	A	--

Housing Placement & Retention

Program	SHS Capacity	Program Launched	Population A, B, Both	Culturally Specific
Adult Outreach Team	--	✓	A	--
JOIN		✓		--
Assertive Engagement	100	✓	Both	--
New Avenues for Youth Inc		✓		--
Outside In		✓		--
Emergency Housing Vouchers	300 apts	✓	A	--
Cascadia Behavioral Healthcare		✓		--
Do Good Multnomah		✓		--
Immigrant & Refugee Community Organization		✓		✓
Human Solutions		✓		--
JOIN		✓		--
NARA		✓		✓
New Avenues for Youth		✓		--
Outside In		✓		--
Portland Homeless Family Solutions		✓		--
Raphael House of Portland		✓		--
Self Enhancement Inc		✓		✓
Urban League of Portland		✓		✓
Volunteers of America		✓		--
Fostering Youth to Independence Vouchers	75 apts	✓	Both	--
New Avenues for Youth		✓		--
Housing Navigators	150	✓	A	--
El Programa Hispano Catolico		✓		✓
Human Solutions		✓		--

Housing Placement & Retention (Continued)

Program	SHS Capacity	Program Launched	Population A, B, Both	Culturally Specific
Native American Youth & Family Services		✓		✓
Self Enhancement Inc		✓		✓
Mobile Housing Team (MHT)	--	✓	A	--
El Programa Hispano Catolico		✓		✓
JOIN		✓		--
Latino Network		✓		✓
NARA		✓		✓
NAYA		✓		✓
Portland Homeless Family Solutions		✓		--
Self Enhancement Inc		✓		✓
Placement Out of Shelter	375	✓	A	--
Human Solutions -Chestnut Tree Inn Move-Out		✓		--
Do Good - Mobile Intensive Support Team		✓		--
New Narratives - Behavioral Health Focus		✓		--
Transitions Project - Mobile Shelter Placement Team		✓		--
Urban League of Portland - Placement Out of Shelter		✓		✓
NEW Rosemont Court Relocation Project	--	--	B	--
Northwest Pilot Project		--		--
Urban League of Portland		--		✓
Stabilization Treatment Program (STP)	15	--	A	✓
Central City Concern Imani Center		--		✓

Appendix B: Quarterly Outcomes Report

Disaggregated by Race & Ethnicity

Permanent Housing Placement

Permanent Housing PSH & RRH Programs Combined SHS-Funded Programs Only	People Newly Placed		People Enrolled, Regardless of Entry Date	
	n	%	n	%
Total People	500	-	890	-
Race & Ethnicity (Mutually				
BIPOC	220	45%	440	49%
Non-Hispanic White	100	20%	250	28%
Race/Ethnicity Unreported	180	35%	200	23%
Race & Ethnicity (Alone or In				
Asian or Asian American	10	2%	20	2%
Black, African American or African	140	28%	250	28%
Hispanic or Latin(a)(o)(x)	80	15%	130	15%
Native American, American Indian, Alaska Native or Indigenous	40	7%	110	13%
Native Hawaiian or Pacific Islander	10	2%	30	4%
White	180	36%	400	45%
Additional Info				
This data is cumulative from Q1-Q3 (7/1/2021 – 3/31/2022)				
All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.				
Numbers less than five are reported as zero. Percentages are excluded for numbers lower than five.				

Permanent Housing SHS Population Breakdown	Newly Placed in Housing	
	n	%
Pop A	396	79%
Pop B	106	21%
Total	502	100%

Homelessness Prevention

Homelessness Prevention SHS-Funded Programs Only	People Newly Enrolled		People Enrolled, Regardless of Entry Date	
	n	%	n	%
Total People	2500	-	2540	-
Race & Ethnicity (Mutually)				
BIPOC	2060	83%	2080	82%
Non-Hispanic White	360	14%	370	15%
Race/Ethnicity Unreported	80	3%	80	3%
Race & Ethnicity (Alone or In)				
Asian or Asian American	270	11%	270	11%
Black, African American or African	850	34%	870	34%
Hispanic or Latin(a)(o)(x)	730	29%	740	29%
Native American, American Indian, Alaska Native or Indigenous	200	8%	200	8%
Native Hawaiian or Pacific Islander	200	8%	210	8%
White	870	35%	890	35%
Additional Info				
This data is cumulative from Q1-Q3 (7/1/2021 – 3/31/2022)				
All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.				
Numbers less than five are reported as zero. Percentages are excluded for numbers lower than five.				

Emergency Shelter

Emergency Shelter SHS-Funded Programs Only	People Newly Enrolled		People Enrolled, Regardless of Entry Date	
	n	%	n	%
Total People	260	-	380	-
Race & Ethnicity (Mutually)				
BIPOC	100	40%	150	41%
Non-Hispanic White	140	53%	200	53%
Race/Ethnicity Unreported	20	8%	20	6%
Race & Ethnicity (Alone or In)				
Asian or Asian American	0	-	10	1%
Black, African American or African	50	18%	70	20%
Hispanic or Latin(a)(o)(x)	30	10%	40	10%
Native American, American Indian, Alaska Native or Indigenous	30	13%	60	15%
Native Hawaiian or Pacific Islander	10	5%	10	3%
White	180	70%	260	69%
Additional Info				
This data is cumulative from Q1-Q3 (7/1/2021 – 3/31/2022)				
All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.				
Numbers less than five are reported as zero. Percentages are excluded for numbers lower than five.				

Emergency Shelter SHS Population Breakdown	People Newly Enrolled		People Enrolled, Regardless of Entry Date	
	n	%	n	%
Pop A	260	100%	380	100%
Total	260	100%	380	100

Services Only - Total Enrolled

Services Only Programs	
People Enrolled, Regardless of Entry Date	530
<u>Additional Info</u> All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.	

SHS-Population A Proxy

SHS Population A Proxy: People with Disabling Conditions and Very Low Income Experiencing or at Imminent Risk of Long-Term Homelessness		
	n	%
Total People	3,760	-
Race & Ethnicity (Mutually Exclusive Categories)		
BIPOC	1,580	42%
Non-Hispanic White	2,120	56%
Race/Ethnicity Unreported	60	2%
Race & Ethnicity (Alone or in Combination Categories)		
Asian or Asian American	60	1%
Black, African American or African	650	17%
Hispanic or Latin(a)(o)(x)	420	11%
Native American, American Indian, Alaska Native or Indigenous	650	17%
Native Hawaiian or Pacific Islander	110	2%
White	2,770	74%
Additional Info		
All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.		

SHS-Population B Proxy

SHS Population B Proxy: People Experiencing or at Significant Risk of Homelessness		
	n	%
Total People	30,230	-
Race & Ethnicity (Mutually Exclusive Categories)		
BIPOC	24,170	80%
Non-Hispanic White	4,670	15%
Race/Ethnicity Unreported	1,390	5%
Race & Ethnicity (Alone or In Combination Categories)		
Asian or Asian American	2,170	7%
Black, African American or African	11,060	37%
Hispanic or Latin(a)(o)(x)	10,040	33%
Native American, American Indian, Alaska Native or Indigenous	1,280	4%
Native Hawaiian or Pacific Islander	1,170	4%
White	9,320	31%
<u>Additional Info</u>		
All numbers are rounded to the nearest ten. Percentages are calculated from actual, unrounded numbers.		

SHS-Funded Beds & Units

SHS-Funded Beds & Units: New		
	Beds	Units
Emergency Shelter	120	120
Permanent Supportive Housing	463	443
PH - Housing with Services	706	419
Rapid Rehousing	299	299
Total	1588	1281
Additional Info		
The numbers above apply to both new and total SHS-funded beds & units.		
Beds & units are only included when at least one person has become enrolled in the program via an Entry Date.		

SHS-Funded Beds & Units: Total		
	Beds	Units
Emergency Shelter	163	163
Permanent Supportive Housing	473	453
PH - Housing with Services	706	419
Rapid Rehousing	300	300
Total	1642	1335
Additional Info		
The numbers above apply to both new and total SHS-funded beds & units.		
Beds & units are only included when at least one person has become enrolled in the program via an Entry Date.		

Appendix C: SHS Financial Report



Joint Office of Homeless Services
Metro Supportive Housing Services Spending
FY 2022 Q3 - January to March, 2022

Current Year Spending:

Category	Multnomah County Budget	Expenditures Reported for Q3	Total Expenditures Reported YTD
Administration & Operations	3,315,317	307,152	768,092
<i>Administration</i>	2,363,833	275,232	673,277
<i>Programs</i>	951,484	31,921	94,815
System Support, Planning & Coordination	10,156,747	514,607	1,379,626
System Access, Assessment, & Navigation	2,448,569	304,046	425,209
Safety off and on the Streets	10,250,000	1,536,613	3,618,470
<i>Regular Ongoing Programs</i>	3,750,000	1,449,438	1,642,253
<i>Emergency Shelter Strategic Investment</i>	3,500,000	-	1,500,000
<i>COVID-19 Recovery</i>	3,000,000	87,175	476,218
Housing Placement & Retention	11,376,060	1,368,208	2,419,507
<i>Regular Ongoing Programs</i>	5,571,060	494,186	1,100,731
<i>COVID-19 Recovery</i>	5,805,000	874,022	1,318,775
Supportive Housing	11,582,807	960,610	1,757,297
Employment Programs (COVID-19 Recovery)	3,000,000	402,134	709,986
Total	52,129,500	5,393,370	11,078,187

Fund Balance:

FY 2021 Revenue	544,000
FY 2021 Expenditures (LIP Development)	(325,699)
Subtotal - FY 2022 Beginning Balance	218,301
FY 2022 YTD Revenue (tax collected through 3/31/2022)	18,672,694
FY 2022 YTD Expenditures	(11,078,187)
Current Fund Balance	7,812,808



Clackamas County Supportive Housing Services Program

FY22 Third Quarter Update

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Overview

In the third quarter the Clackamas County Supportive Housing Services (SHS) program continued fully implementing the housing navigation/placement, supportive housing case management, and Regional Long-term Rent Assistance (RLRA) programs launched in the second quarter. Service providers have continued to staff up their programs and are nearly at full operating capacity. A series of significant procurements were also initiated which will substantially expand the breadth and scale of services offered by the SHS program beginning in the fourth quarter of this fiscal year and into the next fiscal year. The SHS and RLRA programs continue to emphasize internal growth and system development with the hiring of additional staff, refinement of internal program operating procedures, and development of data collection and reporting trainings. The third quarter was a time of growth for the program's current services and the SHS program looks ahead to the continued expansion of the types and level of services available to our neighbors in need.

A photograph showing two hands holding small, handmade cardboard house models. The houses are made of brown cardboard and have blue tape applied to their windows and doors. The background is blurred, showing what appears to be a person in a red and white patterned shirt.

Programs and Services

In the third quarter, Clackamas County's SHS program focused on the continued operation of the transitional and emergency shelter programs and the full implementation of the housing navigation, supportive housing case management, and RLRA services launched in the second quarter. The five community based organizations which launched services in the second quarter have fully stood up their programs and are actively assisting households move into and remain in permanent supportive housing. Summaries and updates on the active programs and services are outlined below:

Serenity and Haven Houses are supportive mental health homes operated by Bridges to Change which shelter and support some of the most vulnerable people in the County: those who are homeless or are at risk of homelessness as they exit incarceration or are on parole/probation. These clients need additional support due to severe and persistent mental illness, substance use disorders, or co-occurring disorders. In the third quarter, SHS program staff began an initiative to expand the current referral process to Serenity and Haven Houses which will facilitate additional connections to individuals in need of their services. This initiative will also enhance collaboration between the County, Bridges to Change, and Central City Concern by connecting Central City Concern's Law Enforcement Assistance Diversion program to Serenity and Haven Houses.

The Hotel/Motel Emergency Shelter Program was a time-limited non-congregate emergency shelter program which began in response to the COVID-19 pandemic to provide a safe shelter-in-place option for people experiencing homelessness with high risk factors for adverse effects from contracting COVID-19. While the SHS program was initially going to assume funding responsibility for this program, it is continuing operations through a combination of Federal Emergency Management Agency (FEMA) and American Rescue Plan Act (ARPA) funds which were leveraged by the County's Social Services Department and SHS program. Households currently in this program are being matched with SHS service providers to receive housing navigation and supportive housing case management assistance as well as rental assistance through the County's RLRA program.

Housing Navigation/Placement Services are being provided by five service providers to place 102 high-need and high-barrier households into permanent housing. Housing navigation assistance is being provided by 12 navigators who work closely with individuals and families to provide flexible funding and services to overcome barriers to housing. All households receiving navigation assistance will also receive supportive housing case management services once they have been placed in

permanent housing. Additionally, they will receive rental assistance through the County's RLRA program to ultimately create a permanent supportive housing living situation for each household.

Supportive Housing Case Management Services are also being provided by the same five organizations who are providing housing navigation/placement services. Nine case managers are providing flexible, tenant-driven assistance to ensure households remain in permanent housing long-term either through ongoing rental assistance and case management support or by "graduating" from rental assistance and/or case management services. These organizations have the capacity to serve 205 households this fiscal year. This figure includes the 102 households set to receive navigation support this fiscal year as they will continue working with their matched service provider to receive supportive housing case management services once they move into permanent housing. All households receiving supportive housing case management services also receive a form of rental assistance, typically through the County's RLRA Program to create permanent supportive housing living situations. In the third quarter, SHS staff began partnering with other County programs, such as Bridges to Housing, to provide additional case management services to some households receiving rental assistance through the RLRA Program.

Rental Assistance is primarily being provided through the County's RLRA program which is anticipated to approve 200 vouchers for households in need of assistance by the end of this fiscal year. This program was created in partnership with the three Counties and Metro staff and is designed to work like a housing choice voucher providing permanent rental assistance to extremely low-income households. Households enrolled in RLRA may be in permanent housing receiving rental assistance or may still be looking for a rental unit that meets their needs. In addition to RLRA, the SHS program began leveraging other forms of rental assistance in the third quarter such as Emergency Housing Vouchers. Households receiving RLRA or other forms of rental assistance will be paired with SHS services such as housing navigation and/or supportive housing case management to create permanent supportive housing living situations

In the third quarter, the SHS program also opened six procurements for additional services which are expected to begin at the end of the fourth quarter or the beginning of FY22-23. These procurements will mark the next significant expansion of the SHS program and lay the ground work for services and programming in FY22-23. These services include:

- Veterans Village Transitional Shelter Operations and Case Management Services
- Emergency Shelter Operations
- Outreach & Engagement Services
- Justice System Diversion Supportive Services
- Peer Services for Housing Authority of Clackamas County Programs
- Supportive Housing Case Management and the County's Shelter + Care Program



Program and System Development

Internal program and system development in the third quarter was carried out in accordance with the Local Implementation Plan's (LIP) Priority Program Investments and System Wide Investment Priorities. Below is a summary of the various activities the SHS program undertook in the third quarter to expand internal capacity, improve the RLRA process, and enhance data collection and reporting capabilities.

Ongoing Expansion of Internal Capacity continued throughout the third quarter. In January, the SHS program added an additional HMIS Management Analyst to oversee data reporting trainings for service providers. Additional recruitments for the SHS and RLRA programs were also initiated at the end of the third quarter. The SHS program hired a contracts analyst who joined the team in April and also opened a recruitment to hire four SHS Program Coordinators. The program coordinators will lead a group of agencies, case managers, peers, and other staff providing housing and wrap-around services for the SHS Program. They will specialize in outreach and safety off the streets; housing navigation and placement; supportive housing case management; and the youth homelessness continuum. The RLRA program team began a recruitment for a landlord liaison who will build relationships with landlords to encourage them to rent to RLRA program participants.

Improving the RLRA Process for both service providers and RLRA recipients continued to be a focus for the program during the third quarter. As RLRA operations have continued to expand since launching in the second quarter, staff identified that security deposit payments needed to be expedited to ensure that RLRA recipients could secure housing. Staff improved their security deposit process which increased the frequency of payment processing from twice a month to weekly. An emergency procedure was also created for extremely time-sensitive cases which allows staff to process payments immediately. Additionally, staff identified that as service providers onboarded new personnel there were gaps in training and knowledge of RLRA processes. In response to this, the RLRA and SHS teams created weekly open office hours for housing navigators and case managers to receive training, clarify processes, and enhance collaboration between the program teams and the service providers.

Strengthening the Program's Data Collection and Reporting Capabilities continues to be a focus of the program as we refine our internal reporting infrastructure and service providers expand their data collection/reporting capabilities and train new staff. SHS data staff have updated and expanded

the SHS program's training procedures and resources for data collection and reporting. A series of dedicated Homeless Management Information System (HMIS) trainings have also been created to assist service providers with training their staff and improving their data collection and reporting processes. This work is improving data quality and reporting timeliness while simultaneously strengthening the relationships with new service providers.



Advancing Racial Equity

During the third quarter, the SHS program continued its work to strengthen its relationship with the two culturally specific service providers new to Clackamas County: Greater New Hope Family Services and El Programa Hispano Catòlico. These organizations both specialize in providing services to historically underserved populations. El Programa Hispano Catòlico specializes in providing services to Oregon's Latino community and Greater New Hope Family Services specializes in assisting Oregon's BIPOC community. Program staff have worked closely with both of these organizations to help them expand their programs into Clackamas County, establish best practices for program management, and enhance their data collection and reporting infrastructure. Additionally, staff have worked with both organizations to facilitate connections and establish relationships with other service providers that have a long history providing housing and homeless services to Clackamas County residents.

The six new procurements launched in March are focused on advancing racial equity by emphasizing the importance of partnering with culturally specific service providers. All six procurements emphasized the importance of equity in service provision and also awarded additional points for culturally specific service providers. Prioritizing partnerships with culturally specific service providers new to Clackamas County is one of the program's primary strategies for advancing racial equity and addressing the historical lack of culturally specific services within Clackamas County.

A small, rustic wooden house constructed from light-colored wooden blocks, sitting on a lush green lawn. The house has a gabled roof and a small square opening on the side. The background is a dense field of green grass.

Financial Summary

In the third quarter, the SHS program's expenditures have begun to more closely reflect the levels of services currently provided as the program's service providers have fully launched their programs and are invoicing the SHS program accordingly. Administrative expenses currently represent a higher percentage than will be reflected in future reports as the program continues to launch new services and expand its operations staff over the coming months.

Additionally, the SHS program has continued to work closely with County staff to leverage other funding sources such as Federal Emergency Management (FEMA) and American Rescue Plan Act (ARPA) funds to continue covering the expenditures incurred by the Hotel/Motel Emergency Shelter Program. Through the first three quarters of this fiscal year, these leveraged funds have covered approximately \$2.5M in expenditures for the Hotel/Motel Emergency Shelter Program. An estimate is provided here as the third quarter expenditures have not been finalized as of this report's publication date. These leveraged funds have allowed the SHS program to allocate its funds for launching new services via the procurements opened at the end of the third quarter.

Figure 1 details the funding received, actual expenditures, and the remaining contract values of contracts the SHS program has executed through the end of the third quarter. The leveraged funding for the Hotel/Motel Emergency Shelter Program enabled \$1.16M of SHS funds for as-needed emergency/transitional sheltering contracts to be reallocated towards new services. Those reallocated funds will now support the new services currently being procured.

Figure 1 - FY21-22 Funding and Expenditures

Funding	Q3 Actuals	Q1-Q3 Actuals	
SHS Measure Disbursements	\$4,828,328	\$5,734,401	
SHS Funding Advance	-	\$5,000,000	
Total Funding	\$4,828,328	\$10,734,401	
Expenditures	Q3 Actuals	Q1-Q3 Actuals	Remaining Executed Contract Value
FY20-21 Carryover	-	\$413,153.67	-
Housing Placement and Support Services	\$412,078.29	\$412,078.29	\$1,759,039.71
Emergency/Transitional Sheltering	\$62,332.68	\$182,609.28	\$126,148.32
Short-term Rent Assistance	-	-	\$90,000.00
Service Provider Administration	\$36,557.66	\$36,557.66	\$228,577.74
Regional Strategic Initiatives	\$18,000.00	\$18,000.00	-
Internal SHS Program Operations	\$123,969.98	\$297,133.65	-
Internal SHS Program Administration	\$63,616.85	\$215,688.09	-
Rental Assistance and RLRA Program Operations	\$288,232.02	\$414,482.43	-
RLRA Administration	\$52,050.15	\$120,436.29	-
Total Expenditures	\$1,056,837.63	\$2,110,139.36	\$2,203,765.77

A collection of wooden cutouts of houses and trees, arranged to represent a neighborhood. The houses are in various sizes and styles, and the trees are simple green shapes. The background is a dark grey gradient.

Program Outcomes & Population

The outcome and population data in Appendix A contains measures which detail the system wide and SHS data for adults and households receiving assistance, unmet need for services in the County, housing placements, and current SHS/RLRA services. System wide and SHS data is for the period of 07/01/21 – 03/31/22 and population data has been disaggregated by race. Reported SHS data includes the population served through the Hotel/Motel Emergency Shelter Program which currently utilizes leveraged funding sources. The reported Population A/B split for the system-wide unmet need was calculated using proxy data which likely contributed to a lower estimated number of Population A households.

The BIPOC population served by the SHS program currently comprises a smaller proportion of total program population than is reported system wide. Initial services are assisting populations in time-limited programs which were established prior to the launch of the SHS program. Third quarter data has begun to show that the population served by the SHS program is becoming more diverse as additional households enter the program. As current services expand and new services are introduced, we will continue partnering with culturally specific service providers to identify and prioritize opportunities to advance racial equity and ensure that the historically underserved BIPOC community is connected to necessary services.

The third quarter of this fiscal year saw consistent growth in the services provided by the SHS and RLRA programs. During this quarter the reporting infrastructure continued to expand and service providers became fully trained in HMIS reporting. Program expansion highlights through the end of the third quarter of FY21-22 include:

- 246 Households have been served by the SHS program through the third quarter.
- 68 Households were leasing with RLRA at the end of the third quarter.
- There have been 68 permanent supportive housing placements through the third quarter.
- SHS program demographics continue to grow more diverse as the BIPOC population grew from 19% to 23% of total program population.

Figure 2 summarizes the number of households receiving and matched for services as of March 31st, 2022. Households are matched with service providers using a by-name list process emphasizing participant choice to ensure that they receive the services best tailored to their specific situation. As service providers establish relationships and begin actively assisting these households, their information is entered into HMIS and reflected in the various data sets contained in Appendix A. Transitional/Emergency Shelters are not tracked by households served in Figure 2 but by the number of units, as to remain consistent with the Program’s LIP. The number of households served by emergency/transitional shelters is available in Appendix A.

Most households in Figure 2 are reflected in more than one service component. Households issued RLRA but not yet leasing are actively looking for housing. Most of these households are receiving housing navigation assistance to help locate and secure permanent housing. The majority of households leasing with RLRA also receive supportive housing case management services once they move into housing.

All households matched for or receiving housing navigation assistance are also matched for supportive housing case management at the same time; however, both components are not utilized simultaneously. Receiving services in Figure 2 reflects the households which have actively utilized that service component.

Figure 2 - Households Receiving and Matched for Services

LIP Service Component as of 03-31-22	Receiving Services / Leasing with RLRA	Matched with Service Provider / RLRA Issued	Total
Supportive Housing Case Management (Households)	68	84	152
Housing Navigation (Households)	66	10	76
Regional Long-term Rent Assistance (Households)	68	71	139
Transitional / Emergency Shelter (Units)	85	-	85



Looking Ahead – Future Program Growth

The SHS program will open a Request for Information (RFI) in the fourth quarter to determine the feasibility of developing new transitional shelters in the County. This RFI will help staff design and develop safety off the street programming by assessing a variety of concepts, cost estimates, and potential partnerships. Potential models include safe rest areas, safe parking sites, transitional villages, facility based congregate shelters, or facility based non-congregate shelters. The goal of this RFI is to help craft future procurements for transitional shelters which will provide a temporary safe place to stay for our neighbors experiencing homelessness until they can find permanent housing.

The six procurements opened at the end of the third quarter will lay the foundation for new and expanded services in the fourth quarter and into FY 22-23. These procurements will make approximately \$6.175M in additional funding for community based organizations available and mark the largest expansion of SHS services since the program's launch. Planned program expansion for the fourth quarter of FY 21-22 and the first quarter of FY 22-23 includes:

Veterans Village Operations and Case Management: The SHS Program has launched a \$350K program offer to partner with a community based organization for management of operations at the Clackamas County's Veterans Village and to provide ongoing case management services for its residents. Veterans Village is a transitional shelter community located in the urban unincorporated community of Clackamas. It consists of 24 small house-like structures which function as sleeping pods with a site layout and infrastructure capable of hosting up to 30 such structures in addition to two buildings for common facilities such as showers and restrooms. Eligible residents are adults experiencing homelessness who identify as veterans of the armed services of the United States.

Emergency Shelter Operations: Continued support and expansion of the County's emergency shelter system continues to be a priority for the SHS program. Through this program offer, approximately \$2.5M in funding will be available to support, expand, or establish emergency shelter operations throughout the Urban Growth Boundary in Clackamas County. Households entering these shelters will also receive diversion services, a Coordinated Housing Access (CHA) screening, have access to on-site amenities, and receive connections to both housing navigation and long-term supportive housing case management services.

Outreach & Engagement: The SHS program will be launching its first outreach & engagement

services through a \$700K program offer. Outreach & engagement services will assist with CHA waitlist clean-up, locate individuals as they come to the top of CHA housing program waitlists, and assist with navigation into permanent housing. Additional services will include providing supplies to help people experiencing homelessness meet their basic needs, facilitating connections to safety-off-the-street services, mental health outreach, and culturally specific outreach.

Justice System Diversion Supportive Services: This \$750K program offer will establish an integrative service model program managed by a community based organization in collaboration with Clackamas County law enforcement agencies, the District Attorney's Office, and Clackamas County. Services will focus on diverting households experiencing or at risk of experiencing homelessness from arrest and incarceration toward voluntary engagement in case management and housing services. This service model is an integrative approach to provide outreach and engagement, connections to stable housing, supportive housing stabilization services, and wrap-around supports to program participants.

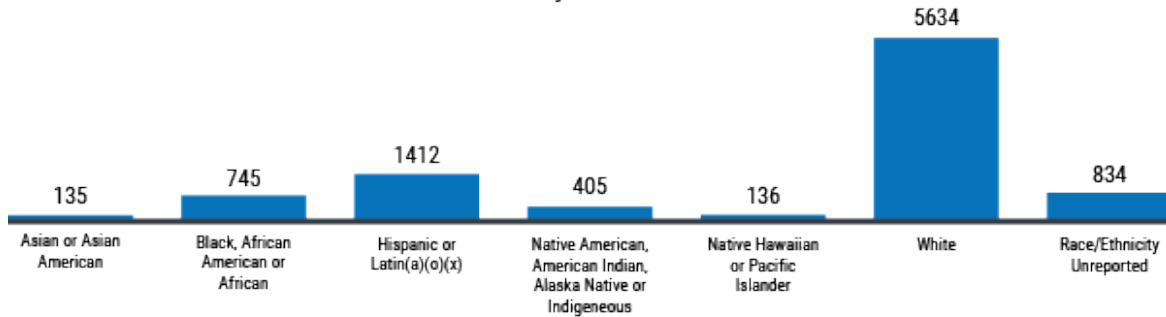
Housing Authority Peer Support Services: A \$275K program offer was also opened to procure ongoing peer support services for residents in programs and properties managed by the Housing Authority of Clackamas County (HACC). The peer support specialists will work closely with HACC resident services staff to identify and provide supportive services for residents in need. Additionally, peer support specialists will plan and coordinate community events for residents, create and implement resident initiatives, and assist residents with resource referrals and systems navigation.

Supportive Housing Case Management and Shelter + Care: The SHS Program will also expand its existing supportive housing case management system capacity and procure case management services for the County's Shelter + Care program through a \$1.6M program offer. Supportive housing case management services are dedicated to ensuring participants remain in permanent housing by providing highly flexible services tailored to meet the unique needs of each household. These flexible services may include assistance in applying for rental assistance and other benefits, connections to independent living supports, assistance with lease compliance, and connections to education and employment opportunities. The County's Shelter + Care program assists chronically homeless individuals with disabilities. Case management services for this program will include assistance with housing navigation and placement, provision of housing retention and eviction prevention services, and assistance in applying for eligible benefits programs.

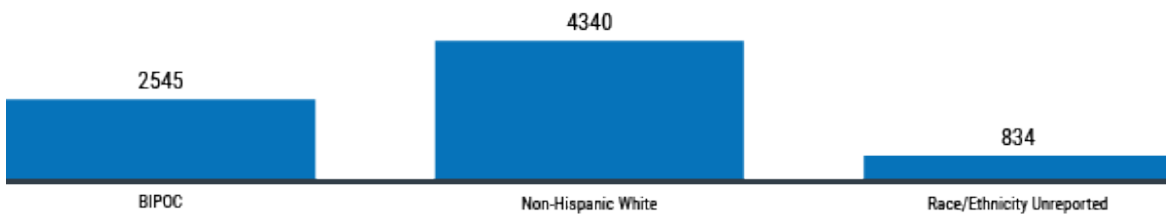
Appendix A

System Wide & Supportive Housing Services Demographics Disaggregated by Race and Ethnicity

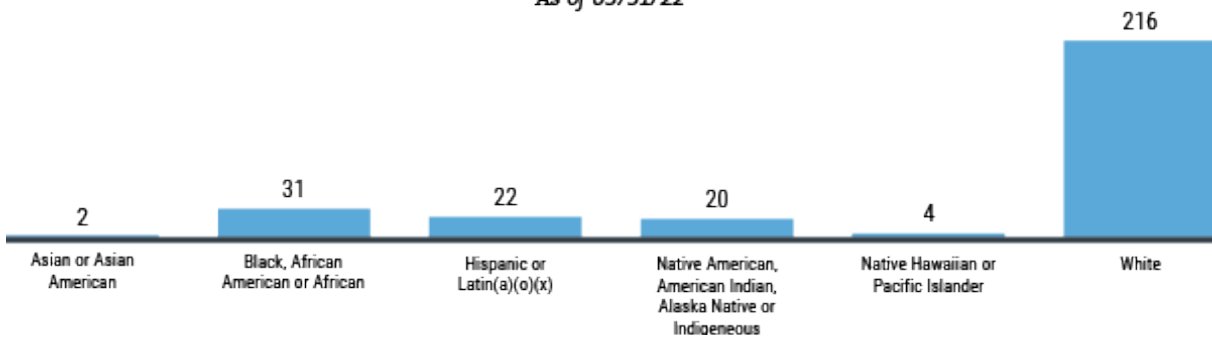
Whole System Demographics: Race & Ethnicity
As of 03/31/22



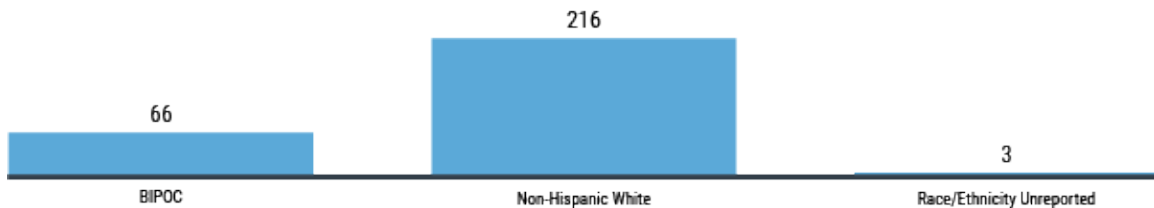
Whole System Demographics: Inclusive Racial Categories
As of 03/31/22



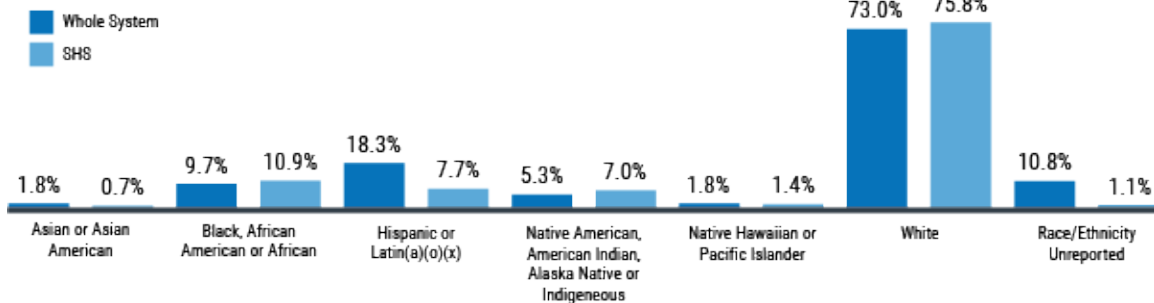
SHS Demographics: Race & Ethnicity
As of 03/31/22



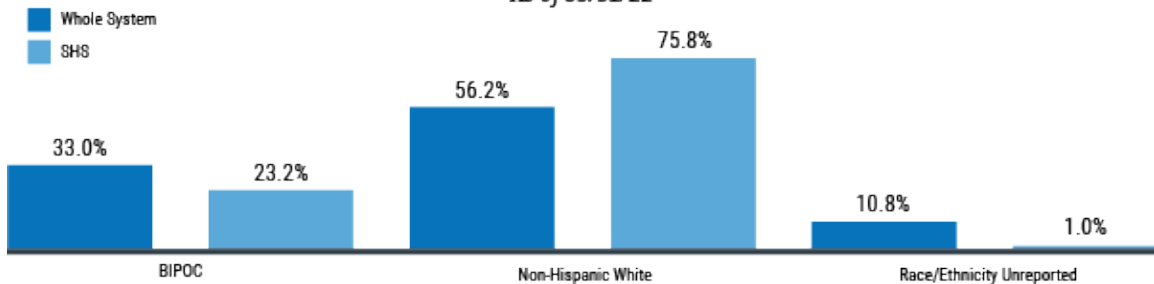
SHS Demographics: Inclusive Racial Categories As of 03/31/22



Whole System and SHS Demographics Comparison: Race & Ethnicity As of 03/31/22

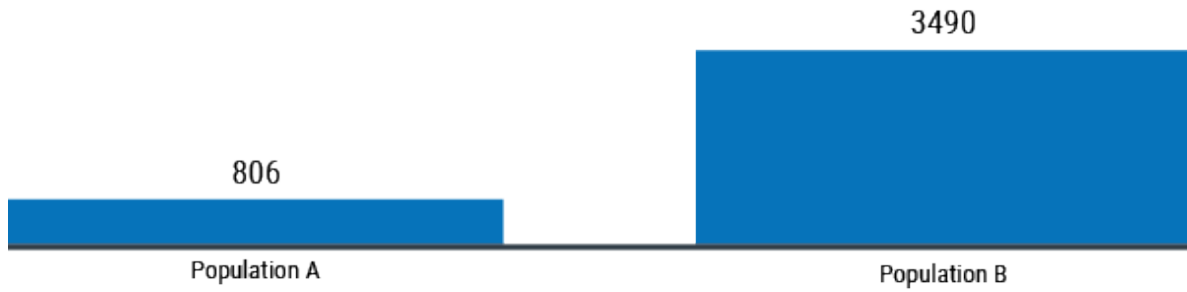


Whole System and SHS Demographics Comparison: Inclusive Racial Categories As of 03/31/22



System Wide Unmet Need

System Wide Unmet Need
As of 03/31/22

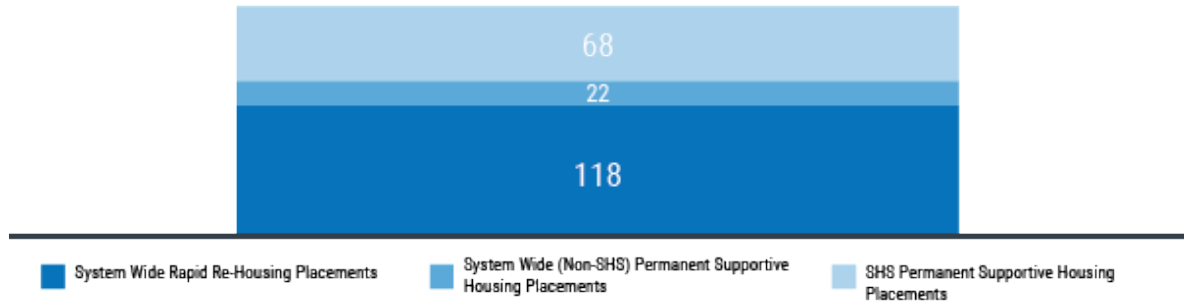


System Wide Average Years Homeless by Population with Unmet Need
As of 03/31/22



Supportive Housing Services and System Wide Housing

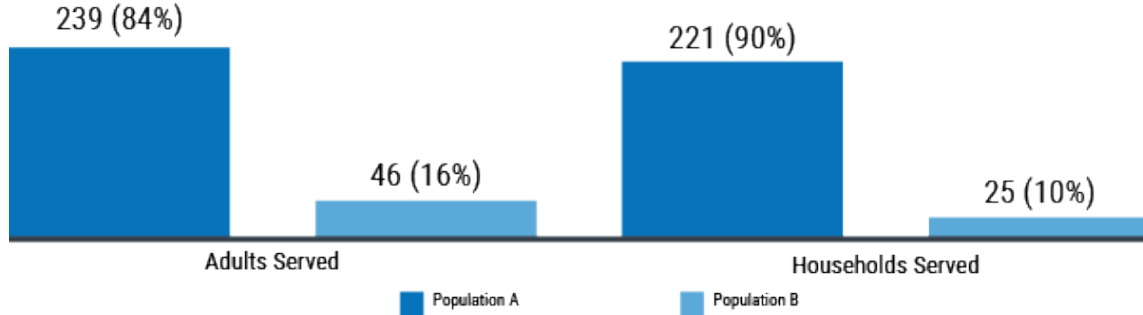
Housing Placements
As of 03/31/22



Supportive Housing Services – Adults and Households Served

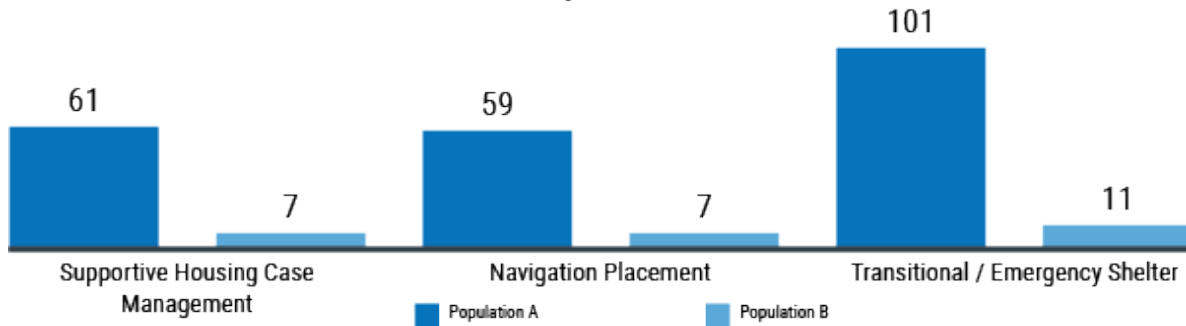
Adults and Households Served by SHS Services

As of 03/31/22



Households Served by SHS Services

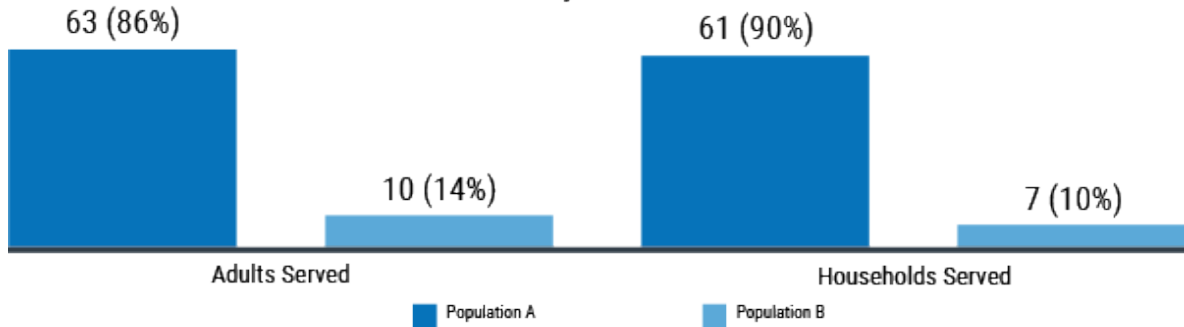
As of 03/31/22



Regional Long-term Rent Assistance – Adults and Households Served

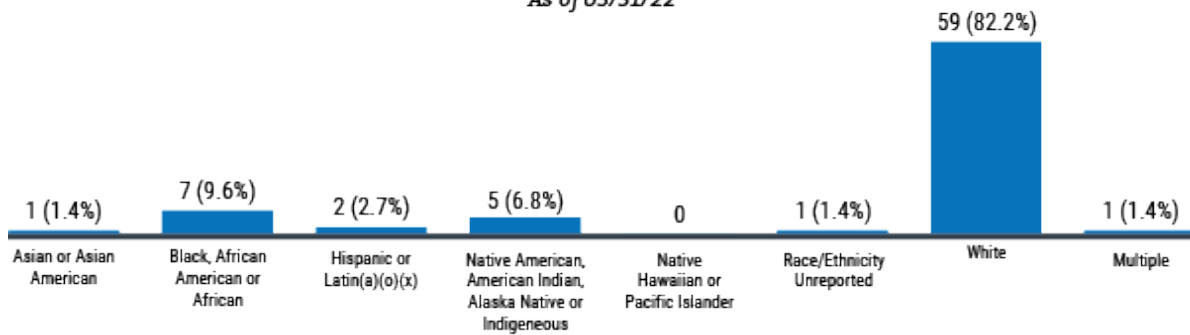
RLRA Adults and Households Served

As of 03/31/22



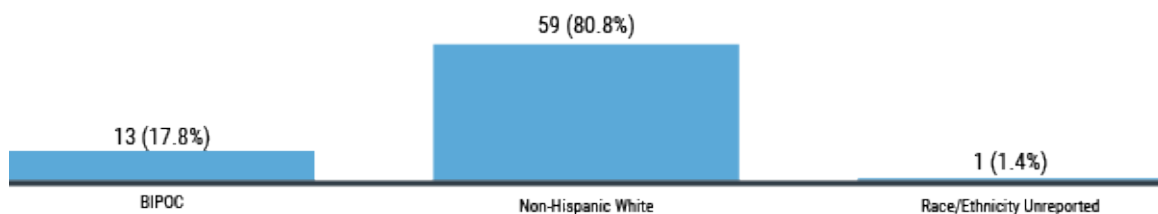
RLRA Demographics: Race & Ethnicity

As of 03/31/22



RLRA Demographics: Inclusive Racial Categories

As of 03/31/22





Department of Housing Services | **Supportive Housing Services**
Quarter 3 Report | January 1, 2022 – March 31, 2022

Program update:

In the third quarter of the first program year, Washington County’s Supportive Housing Services (SHS) program focused on strengthening programs and systems to increase housing outcomes and maximize emergency shelter capacity. The Housing Case Management Services (HCMS) and Regional Long Term Rent Assistance (RLRA) programs are well underway and working in tandem to serve Population A households with permanent wrap-around supports and housing assistance. The 18 contracted community-based partners are still building their new programs, learning new financial and data management operations, while hiring and training new staff to implement and achieve housing goals.

To support our HCMS and RLRA programs, the Supportive Housing Services program launched several new complementary program elements in the third quarter. Phase 2 assessments for the new Coordinated Entry System rolled out and were trained across the service provider network. These assessments provide guidance and structure to begin effective housing searches with participant households. Additionally, a tenant screening tool was launched that now allows all case managers to easily gather credit, tenant and criminal history data for participants, to aid in navigating screening barriers and working with landlords to overcome applicational denials. Last, the program launched ‘Learning Communities’ for new housing workers to learn and teach housing navigation, harm reduction and trauma informed client-centered case management from and with their peers.

In Q3, the program also made a strategic decision to extend winter shelter capacity and postpone the launch of Population B focused housing programs. The winter shelter system was expanded from 187 beds to 227 beds and the program was extended as long as sites could continue to host these shelter programs. This strategic expansion added hundreds of bed days to our shelter capacity giving participants more time to connect to housing placements through the fiscal year. However, “Enhanced Rapid Rehousing” case management and one-time “Rapid Resolution” financial assistance were rescheduled to launch in the new fiscal year. These Population B focused housing programs were postponed recognizing the limited capacity of service providers to launch additional new programs and the availability of remaining Rapid Rehousing funds through one-time COVID funds. Instead, the County will begin preparing providers ahead of the new fiscal year with contracts and training to ensure a swift launch of these population B programs in FY22/23.

At the end of Q3, 159 households have been successfully placed into supportive housing, an additional 297 households are enrolled in the program, of which 211 are already shopping for an apartment. The program is not likely to achieve our goal of 500 placements before the end of the program year, however partners are working with the County to maximize staff capacity and resources to reach an amended goal of 300 placements.

A Housing Access Fair was hosted by the County with our 18 service provider organizations on April 19th and 20th. The two-day pop-up access center aimed to connect people experiencing homelessness directly with available housing programs and begin working with new case managers towards housing placement. The event was an enormous success, enrolling 94 households into HCMS, RRH and other housing programs across the homeless system of care. It is hoped that most of these households will secure new housing in the coming months, and the event will be repeated semi-annually to connect people in need with new housing resources as they come online.

Financial Update:

The Q3 financial report continues to demonstrate the early building work of a new regional program. Regional tax collection has begun to yield more significant revenues for Washington County, ensuring that our initial interfund load will be repaid in full by the end of fiscal year and not needed to support programs in Year 2. Service providers continue to build their programs, hire new staff, and learn new accounting procedures. Invoices from these contracts have begun to be received, but do not fully reflect the actual work completed to date. Washington County anticipates program spending to increase significantly through the next several quarters as organizations reach capacity and normalize their operations, and more households begin to receive monthly rent assistance.

Revenues		
	Revenue projected	38,329,500
	Revenue received	8,960,001
	Interfund loan	12,500,000

Expenditures			
Program	Budgeted	Allocated	Actuals (includes advances)
Housing and support services	8,433,525	6,630,130	3,862,728
Shelter services	6,000,000	5,746,855	2,593,234
Housing financial assistance	5,250,000	4,375,000	791,882
Systems and capacity building	4,200,000	200,000	150,000
Regional Investment Strategy Fund	1,916,475	1,916,475	-
Program operating costs	3,454,663	3,003,932	2,021,978
Totals	29,254,663	21,872,392	9,419,822

Reserves		
	Program reserves	5,000,000
	Economic stability reserves	2,934,837
Totals		7,934,837

Data Outcomes:

After 9 months data trends are starting to emerge and demonstrate the impact of the new SHS program. 159 households have been placed in a supportive housing placement through SHS, an additional 297

households are enrolled in the program with a case manager and 211 are shopping for an apartment with the Regional Long Term Rent Assistance (RLRA) voucher. Of the total households placed through SHS program to date 22% are Latino/a/e and 14% are Black, Indigenous, Asian, or Pacific Islander. Program placements show the impact of investments in culturally specific organizations supporting the Latino/a/e community with a significant increase in the proportion of total new housing placements growing from 18% in Q2 to 33% in Q3. Additionally, the average length of homelessness for those who were housed increased from 1.18 years to 1.96 years. We interpret this as a positive sign that our programs are better able to reach and house participants that have experienced prolonged homelessness.

Finally, the program continues to show progress in our investments to create supportive housing capacity. An additional 240 slots of supportive housing were created in Q3 to bring the total capacity to 730. This data point represents the number of case managers who were hired and trained in Q3 and began to enroll new participants and will lead to housing placements in future quarters.

SHS Goal – Year 1		Q3 Capacity	Q3 Outcomes
Supportive Housing Placements for Population A	500 300	730	159
Housing Stabilized for Population B	500	-	19
Year-round shelter capacity added	100	102	102

Programmatic work planned for Q4:

Washington County is looking ahead to the final quarter of the first year to achieve several additional programmatic milestones. The program will remain primarily focused on supporting our HCMS provider partners to achieve as many supportive housing placements as possible by the end of the program year. To support this work, the Landlord Liaison program will launch providing lease-up incentives to landlords as well as ongoing supports such as a warm-line for tenant concerns and the regional risk mitigation fund for any lost income or property damages.

Recently, the program completed extensive community engagement work to co-create our Community Guidelines for Shelter Program Expansion. These community discussions and the new framework document will guide decision making and continued partnerships with local communities as we seek viable sites to locate permanent, temporary, traditional, and non-traditional shelter programs across the County. The County has made a commitment to create 250 year-round shelter beds. Recently the Cities of Hillsboro and Beaverton acquired properties that will provide approximately 100 shelter beds, and a community partner has been awarded ARPA funding in Tigard for a permanent shelter program. As winter shelter programs close this year, there is acute need for shelter capacity of all types across the County. Staff will be working to identify viable sites with the new Community Guidelines as quickly as possible.

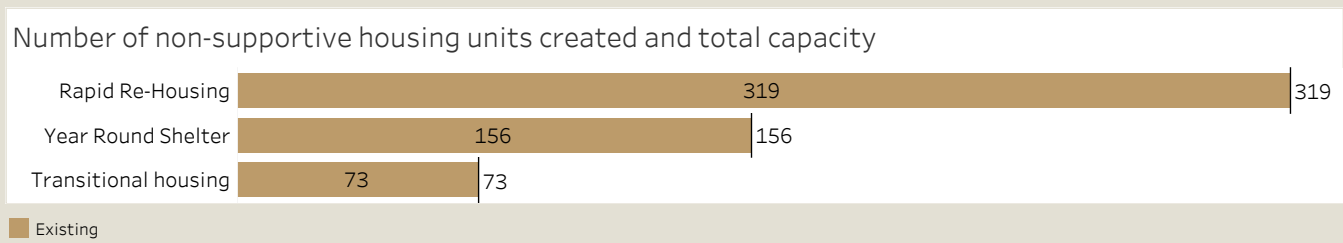
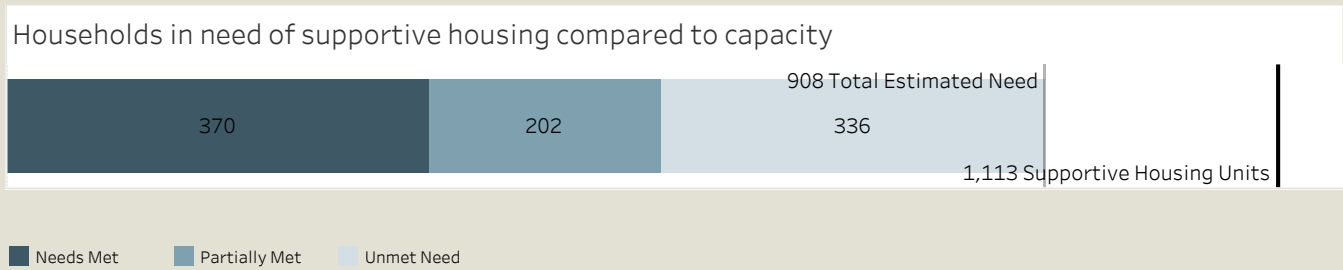
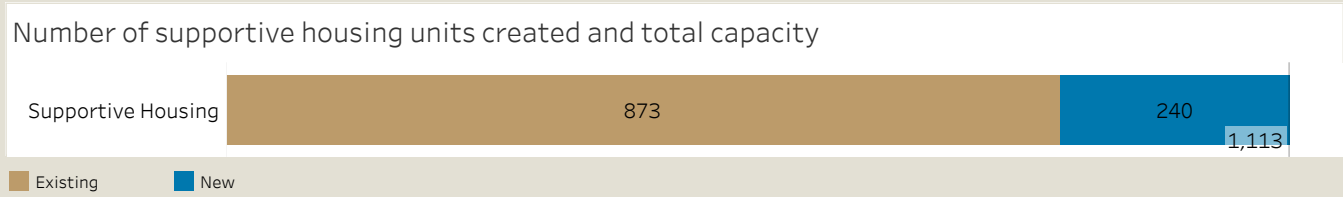
Finally, a couple of new pilot programs are underway in the final quarter of this year. First, The Housing Liaisons pilot is rolling out in five Health and Human Services Department programs to assist case

managers and direct care providers from other systems of care to successfully navigate the housing system for the benefit of their program participants. Bienestar, Project Homeless Connect, and Open Door are partnering with the Maternal, Child and Family Program, the Developmental Disabilities Division, the Hawthorn Walk-in Center, the Behavioral Health Division's Intensive Case Coordination Program, and the Disability Aging and Veteran Services Program respectively in this pilot program aimed to leverage and align our systems of care. A Workforce Development pilot for people with lived experience has also been released as a Request for Proposal (RFP) for eligible service providers from among the expanded and pre-qualified Tri-County SHS supplier pool. The program will launch this coming year with the goal of training up new staff ready for internships and future employment in the Washington County homeless system of care where workforce demands are expected to continue increasing in the coming years.

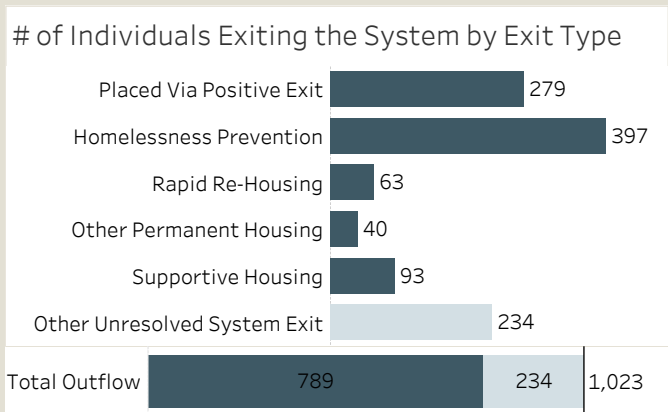
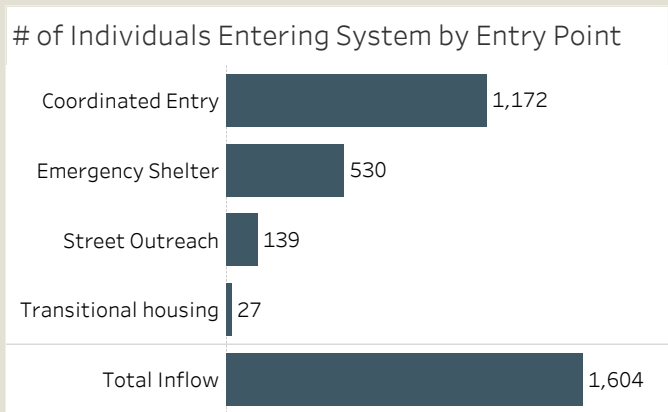
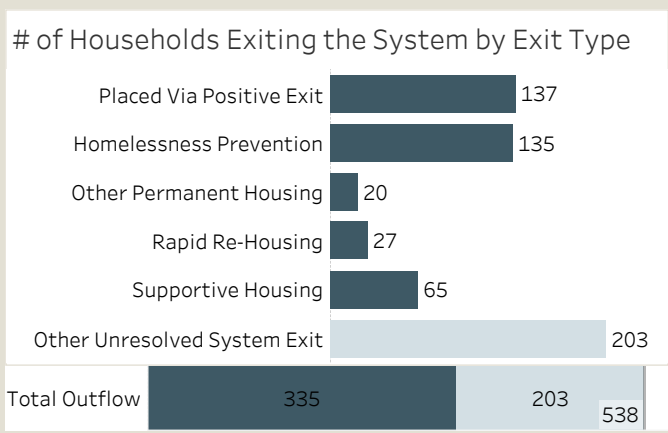
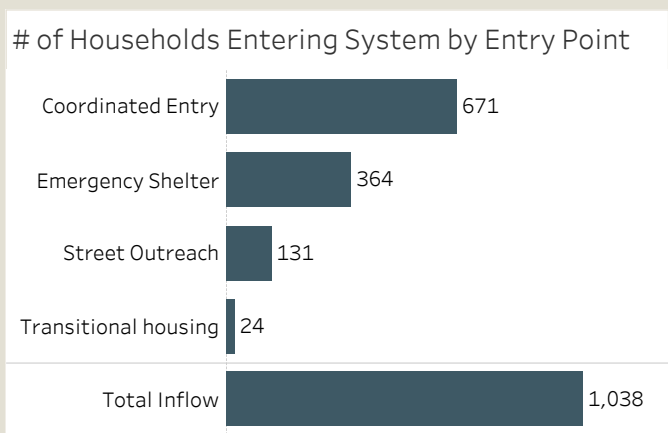
Appendix: Quarterly Systems Outcomes Data Report

For the period 1/1/2022 - 3/31/2022

System Capacity

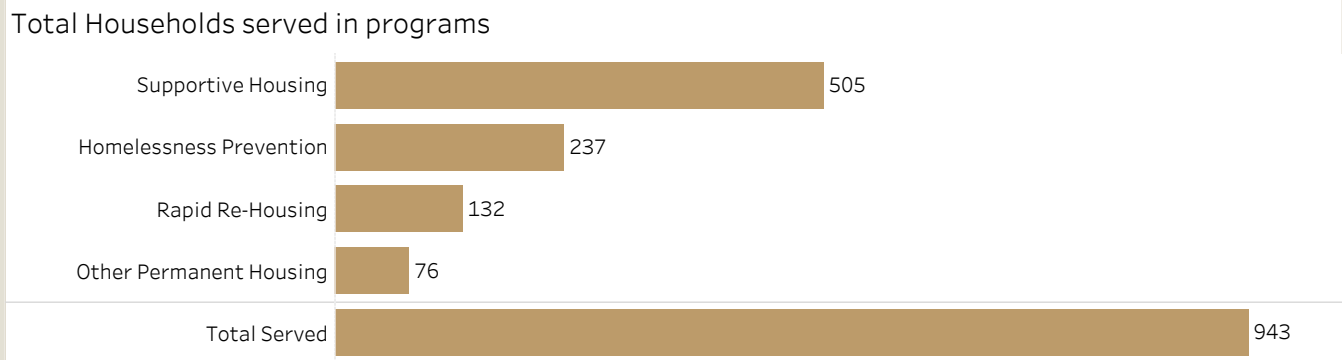
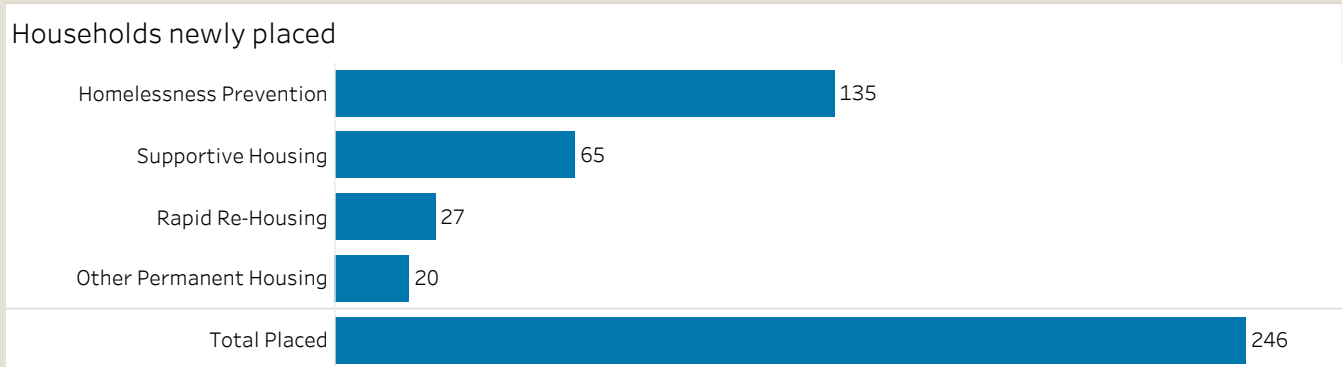


Programmatic Inflow and Outflow



Number of Households with housing placements and homelessness preventions

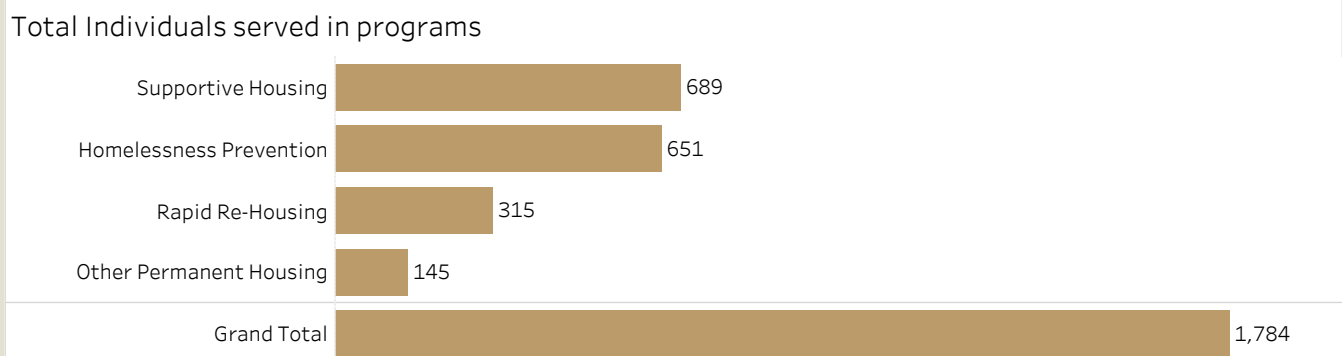
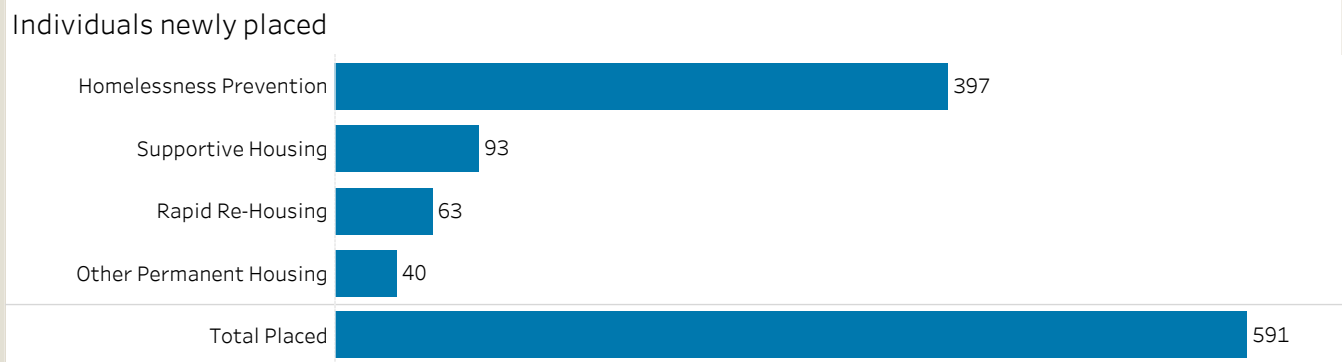
Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).



Households newly housed and retained in projects during the reporting period. Households in permanent housing projects must have a valid housing move-in date.

Number of Individuals with housing placements and homelessness preventions

Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).



Length of Homelessness (Years)

Length of time between approximate date homelessness started (prior to system or program entry) and the last day of the reporting period (if unhoused) or Housing Move-in Date (if housed).

Housed in Q2	1.96
Unhoused at end of Q2	1.90
Avg Length of Time Homeless	1.91

Note: Unhoused is anyone with an open entry into CES, ES, SO, or TH with a homeless Prior Living Situation. For CES, entries are assumed closed after 180 days even if no exit date. For SO, entries are assumed closed after 2 years if no exit.

Household Returns to Homelessness Services

Households who exited the homelessness services system to a permanent housing destination, and returned to the homelessness services system within two years of exit.

% of Households Returning to Homelessness Services

4.6%

Households Returning to Services within 2 years 118

Households Exiting Services in the Last 2 years 2,581

Households are considered to have returned to services if they have an entry in an CES, ES, SO, or TH project anytime after exiting to a PH destination, or if they return to RRH or PSH more than 30 days after exiting to a PH destination.

Individual Returns to Homelessness Services

Individuals who exited the homelessness services system to a permanent housing destination, and returned to the homelessness services system within two years of exit.

% of Individuals Returning to Homelessness Services

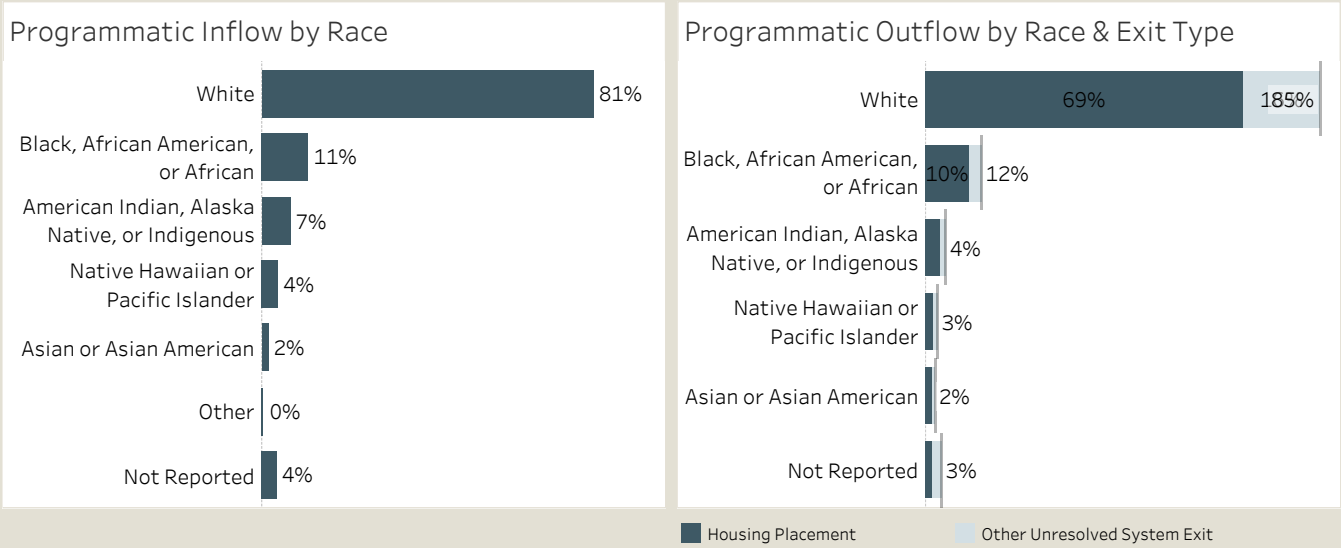
3.2%

Individuals Returning to Services within 2 years 199

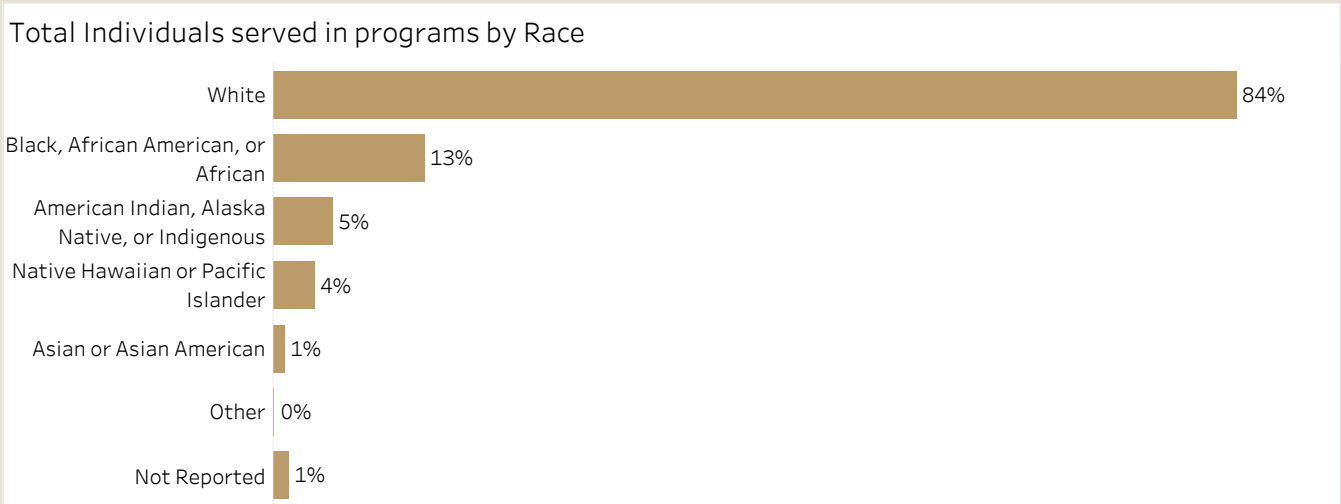
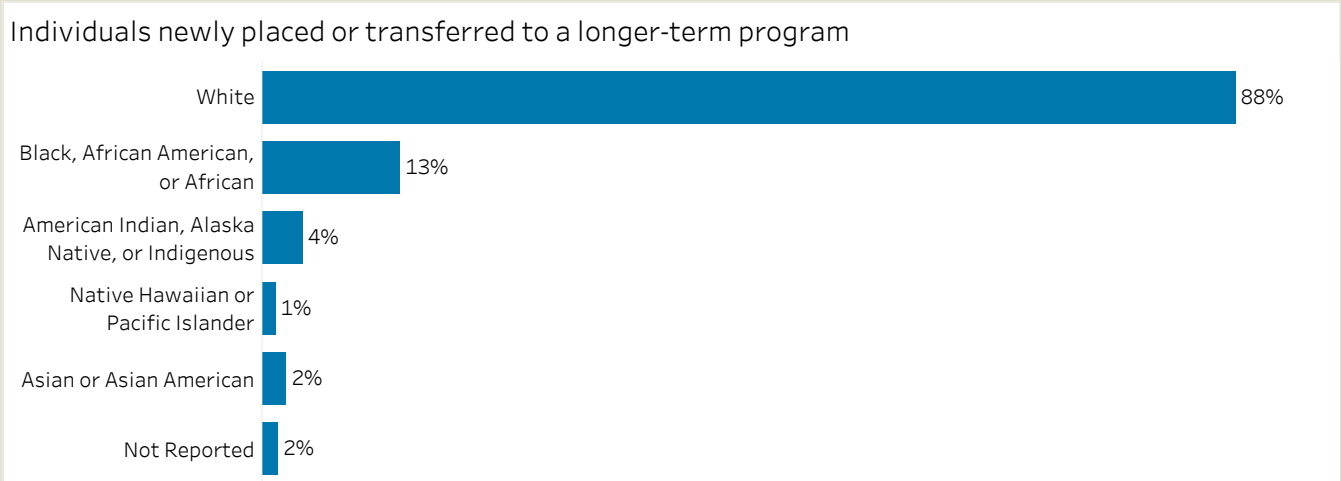
Individuals Exiting Services in the Last 2 years 6,179

Breakdowns by Race

Inflow & Outflow

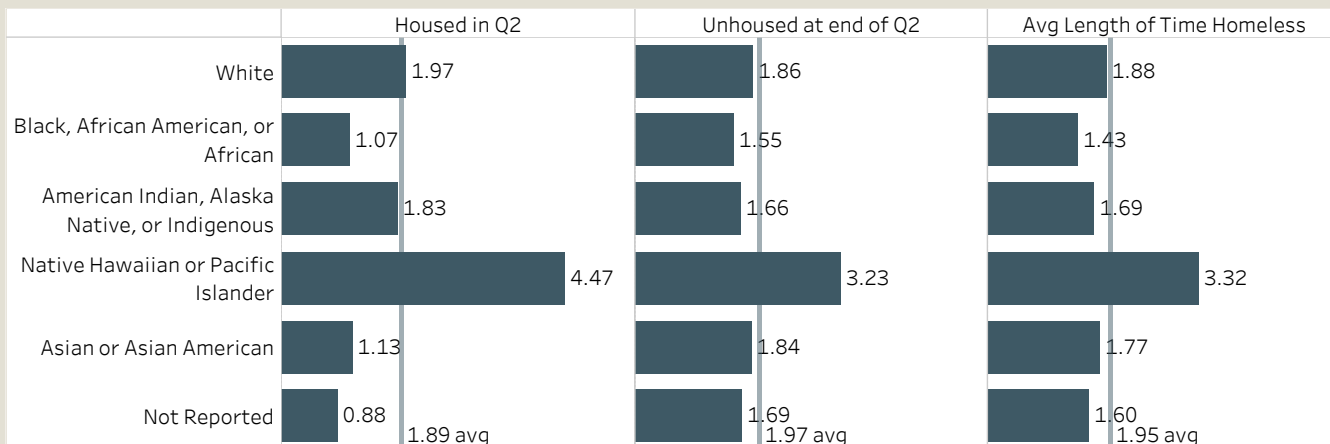


Populations Served

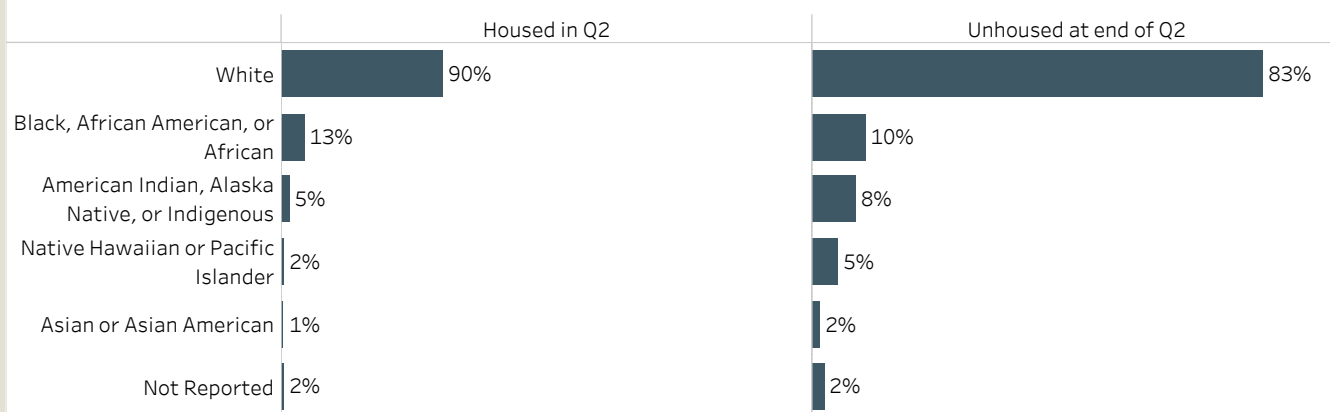


Breakdowns by Race, continued

Length of Time Homeless (in years)

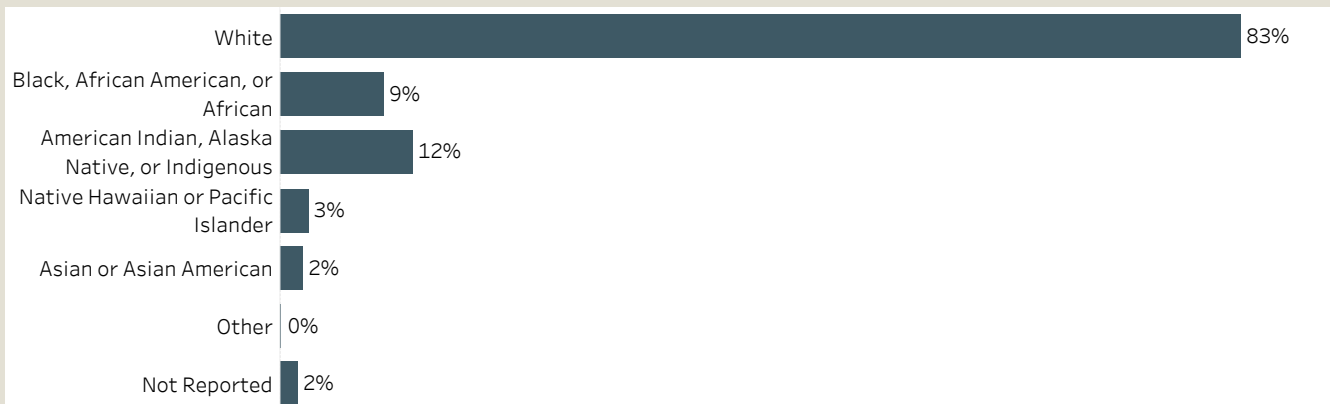


End of Quarter Housing Status by Race



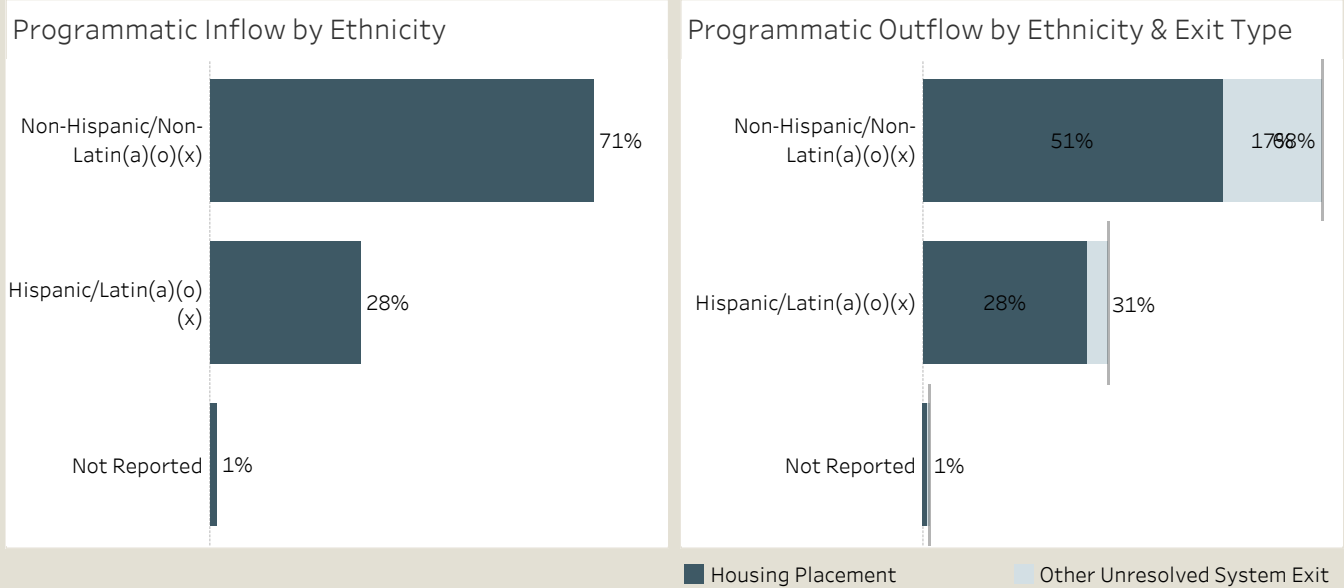
Note: Housing status was only calculated for participants who had an Approximate Date Homelessness Started value. There may be a difference in the percentage breakdown for the Housed population and the Newly Placed numbers in prior sections.

Number Returning to Homeless Services

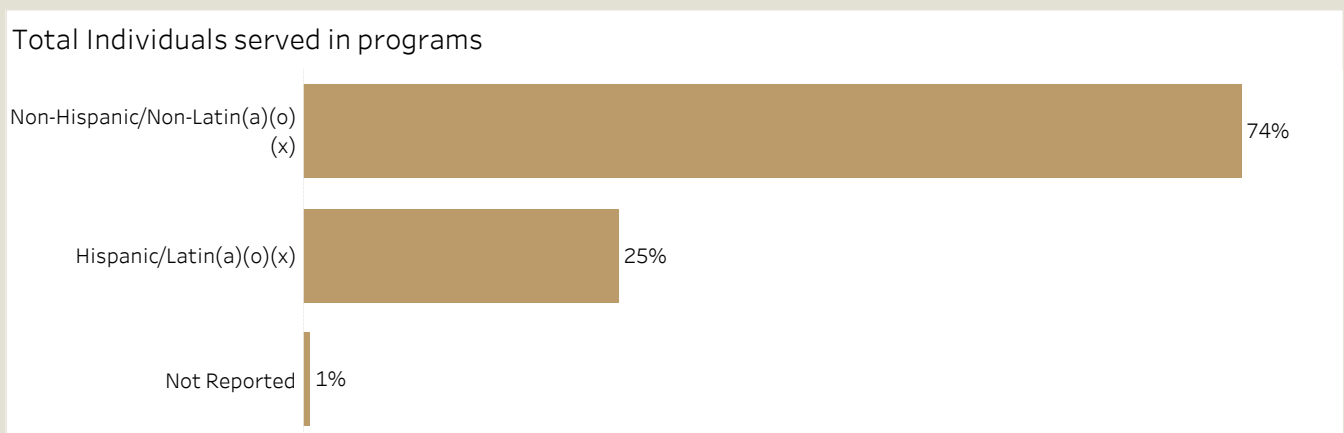
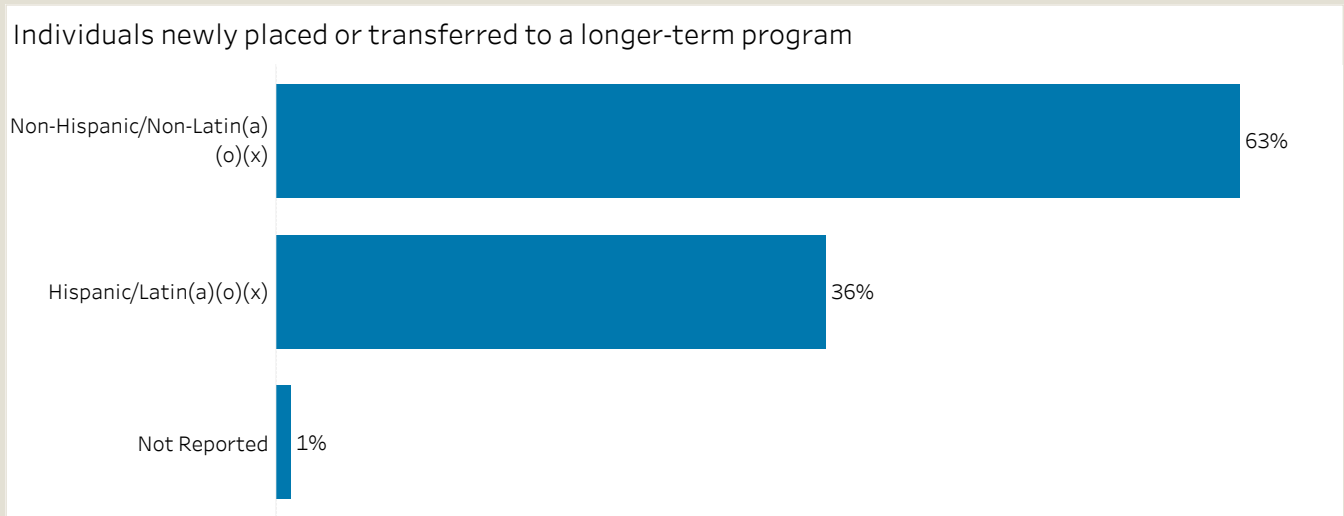


Breakdowns by Ethnicity

Inflow & Outflow

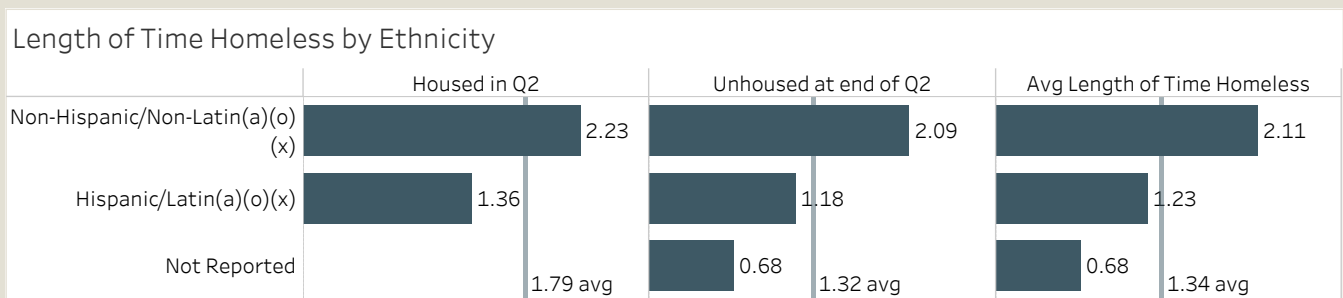


Populations Served

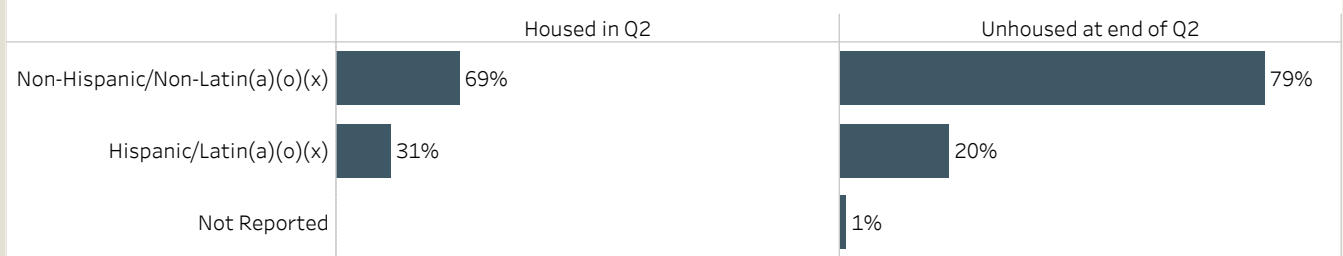


Breakdowns by Ethnicity, continued

Length of Time Homeless (in years)

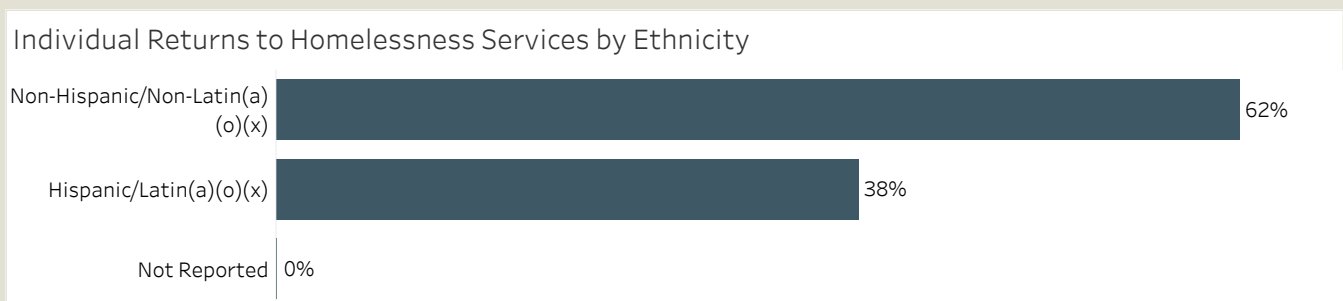


End of Quarter Housing Status by Ethnicity



Note: Housing status was only calculated for participants who had an Approximate Date Homelessness Started value. There may be a difference in the percentage breakdown for the Housed population and the Newly Placed numbers in prior sections.

Number Returning to Homeless Services



SHS Outcomes

For the period from 1/1/22-3/31/22

Number of SHS supportive housing units created and total capacity



Number of other SHS units created and total capacity



Number of Households with SHS housing placements and homelessness preventions

Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).

Households newly placed



Total Households served in SHS programs



Number of Individuals with SHS housing placements and homelessness preventions

Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).

Individuals newly placed



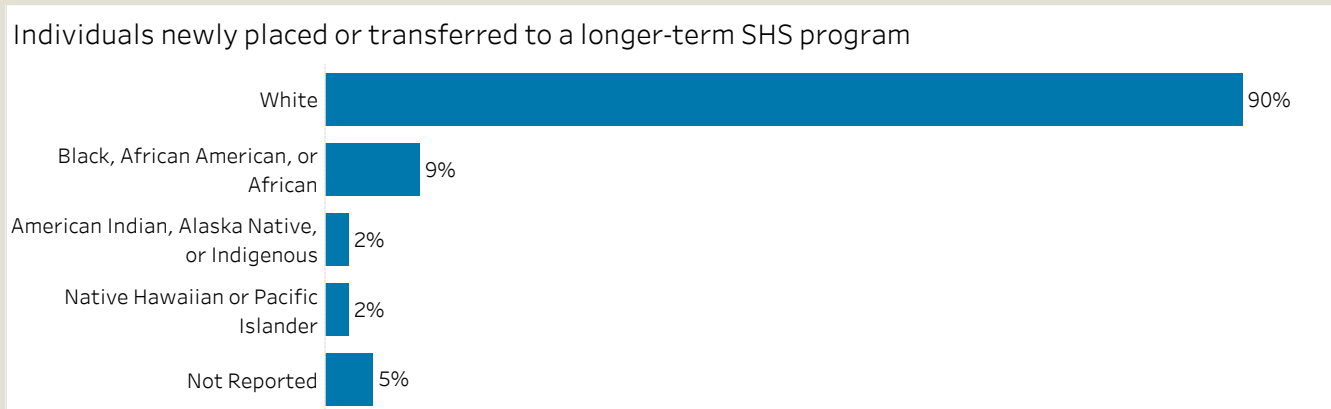
Total Individuals served in SHS programs



SHS Outcomes by Race & Ethnicity

Number of Individuals with SHS housing placements and homelessness preventions by Race

Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).

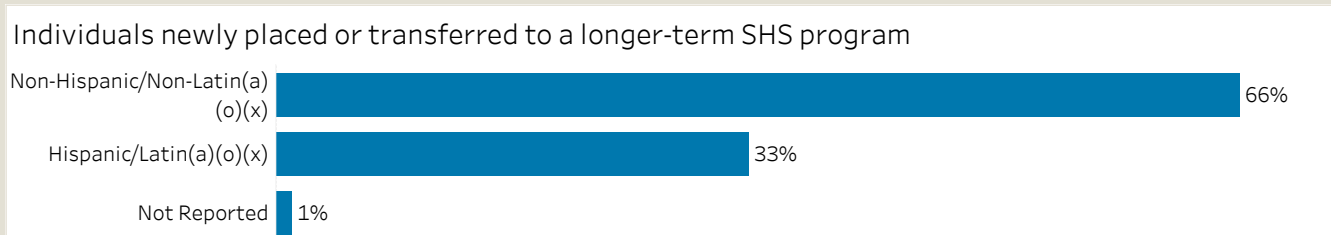


Total Individuals served in SHS programs by Race

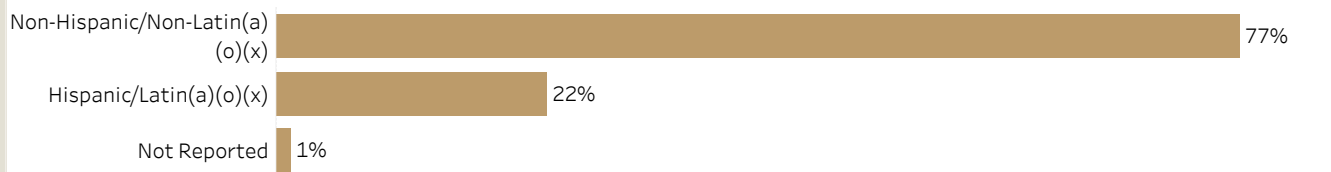


Number of Individuals with SHS housing placements and homelessness preventions by Ethnicity

Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing).



Total Individuals served in SHS programs by Race





Metro

RTP Congestion Pricing Policy Development

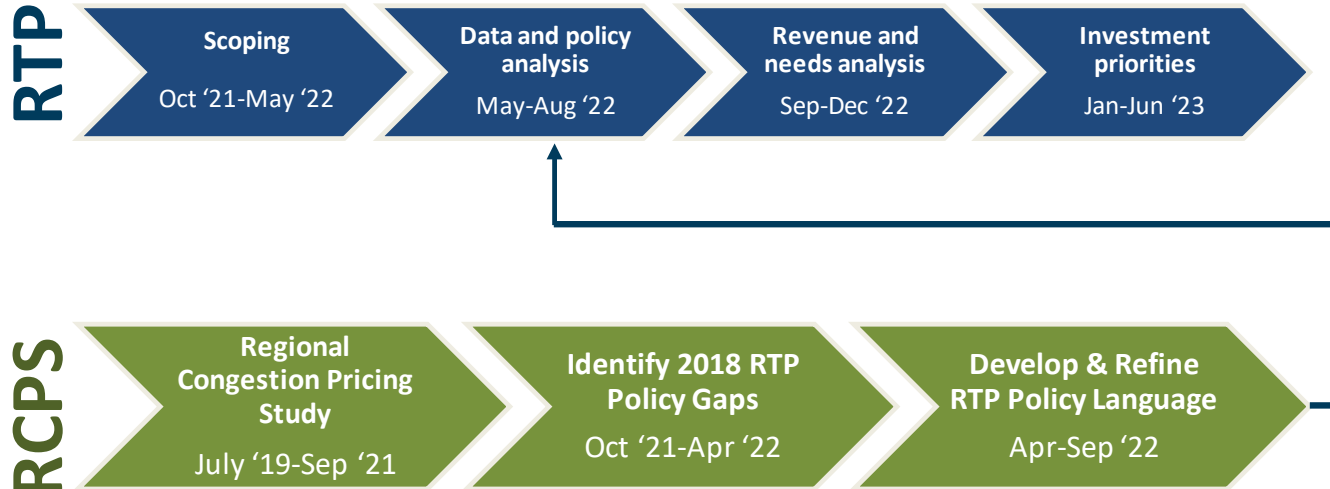
MPAC

July 27, 2022

Congestion Pricing Policy Development

- Schedule for 2023 RTP update
- Reminder of Regional Congestion Pricing Study findings
- Summary of work to date
- 2023 RTP policy recommendations
- Next Steps
- ODOT update on Oregon Highway Plan Tolling Policy Amendment and Low Income Toll Report

2023 RTP Update Schedule



We are here: Sharing revised draft 2023 RTP policy language with MPAC

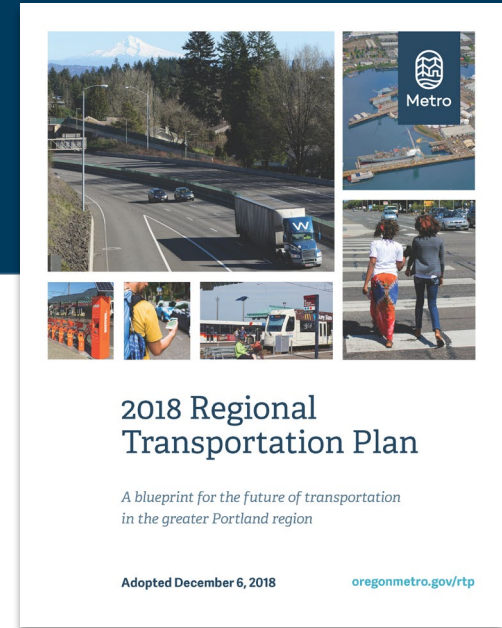
Planning Context

Multiple plans identify the need since 2000 RTP

- *TSMO Strategy– 2010 and 2021, 2014 Climate Smart Strategy & Federal congestion management process for the Region since the mid-1990s*

JPACT and the Metro Council prioritized a near-term comprehensive review of congestion pricing in the 2018 RTP

- *Over \$15 billion in transportation investments need to be paired with travel demand efforts*
- *Multiple congestion pricing policies in the 2018 RTP*



Project Context

I-205 Toll Project

PURPOSE AND NEED STATEMENT

REVISED FINAL 8/18/2021

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 Region was consistently identified as one of three key themes across Oregon. Congestion in the 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 (OTC) to develop a congestion relief fund, and to seek approval from the Federal Highway Administration (FHWA) to implement tolling (also referred to as value pricing or congestion pricing) on the Interstate 5 (I-5) and Interstate 205 (I-205) corridors to reduce traffic congestion in the Portland metro area.

In 2018, the OTC 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. For I-205, the Policy Advisory Committee recommended implementing 'variable-rate tolls' on all lanes of I-205 on or near the Abernethy Bridge as a potential funding strategy and for congestion management. In December of 2018, the OTC submitted a proposal to the FHWA outlining the findings of the feasibility analysis and seeking approval to continue the process of implementing tolls on I-5 and I-205 (ODOT 2018a). In January 2019, FHWA provided guidance to move into the next phase of evaluation and study (FHWA 2019). In 2020, FHWA and ODOT determined that an environmental assessment (EA) would be the appropriate NEPA documentation for the I-205 Toll Project (Project).

ODOT identified the I-205 Improvements Stafford Road to OR 213 Project (I-205 Improvements Project) as a priority project for ODOT. The I-205 Improvements Project includes seismic bridge upgrades, adding a third lane north and south, and interchange improvements. The project received NEPA clearance in 2018 and will be constructed in phases. In 2021, HB 3055 provided financing tools that allow construction on the first phase of the I-205 Improvements Project to begin in 2022, which includes reconstruction of the Abernethy Bridge and adjacent interchanges. Tolls are needed to fund subsequent phases of the I-205 Improvements Project.

¹ Variable-rate tolls are user fees that vary in amount based on certain conditions (e.g. time of day, day of the week, direction of travel). Variable-rate tolls can occur on a fixed schedule that is known to travelers.



Fact Sheet

January 2021



A modern connection for a growing community

The Interstate Bridge is a vital transportation link for the greater Portland-Vancouver region. The bridge connects tens of thousands of people daily to offices, industries, schools, sporting events, places of worship, stores, restaurants and entertainment venues. It connects families, friends and neighbors. **It connects communities.**

As the only continuous north-south freeway between Canada and Mexico on the West Coast, the Interstate Bridge is part of a critical trade route for regional, national and international commerce. Beyond the concrete, asphalt and steel of the Interstate Bridge is a thriving background of scenic views, natural systems, and a rich history of our region's national heritage.

The states of Oregon and Washington are working together to replace the aging Interstate Bridge with a modern, seismically resilient, multimodal structure that provides improved mobility for people, goods and services well into the next century.


Why we need a replacement bridge

The Interstate Bridge is two bridge spans, side by side. The northbound span is over 100 years old, dating back to 1917. The southbound span opened in 1958. The existing structures were not designed to support the needs of today's transportation system. The program is in the early stages of working with stakeholders and the public to identify the problems we need to solve. We already know, however, that problems identified over the past decades remain and have not been addressed.




Community Input

**Equity and Mobility
Advisory Committee:**




**Shaping an Equitable
Toll Program**

Recommendations to the Oregon Transportation Commission
July 2022




**PRICING OPTIONS FOR
EQUITABLE MOBILITY**

FINAL REPORT



CITY OF PORTLAND
PORTLAND BUREAU OF TRANSPORTATION
PORTLAND BUREAU OF PLANNING AND SUSTAINABILITY



Bureau of Planning and Sustainability
Innovative. Collaborative. Practical Solutions.

Regional Congestion Pricing Study

- RCPS initiated in summer 2019
- TPAC acted as technical advisory committee, regular meetings with JPACT, Metro Council and other stakeholders
- Developed scenarios and tested with Metro travel demand model
- Developed and shared findings, recommendations, and draft report with partners, TPAC, MPAC, JPACT, Metro Council and expert panel



Regional Congestion Pricing Study

- All four pricing types **addressed climate** and **congestion** priorities.
- **All eight scenarios** reduced the drive alone rate, vehicle miles traveled, and emissions, while increasing daily transit trips.
- Geographic distribution of costs and benefits varied by scenario.
- There were **tradeoffs** for implementing pricing scenarios.



Expert Input on Methods and Outcomes – *Expert Review Panel April 22, 2021*



Jennifer Wieland - moderator

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

Nelson\Nygaard



Daniel Firth

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

C40



Sam Schwartz

Founder and CEO; Father of NYC congestion pricing

Sam Schwartz Transportation Consultants



Rachel Hiatt

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

San Francisco County Transportation Authority



Christopher Tomlinson

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

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



Clarrissa Cabansagan

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

TransForm

RCPS Resolution

- In September 2021, Metro Council adopted Resolution No. 21-5179 to accept the findings and recommendations in the final report
- Resolution No. 21-5179 additionally directed staff to incorporate the findings and recommendations from the study in the 2023 RTP update and use them to inform the 2023 RTP update

Committee Work To Date

4.20.22	TPAC/MTAC Workshop	Review 2018 RTP Policy
6.03.22	TPAC	Introduce Draft 2023 RTP Policy
6.21.22	Metro Council Work Session	Introduce Draft 2023 RTP Policy
7.13.22	TPAC Workshop	Revised 2023 RTP Policy, Introduce Action Items
7.27.22	MPAC	Introduce Draft 2023 RTP Policy

What We've Heard

- Tolling issues have been front and center over the last year
 - MTIP & RTP amendments, OHP amendment
- Desire to lead with equity and climate
- Concerns about diversion
- Make sure that the revenue can be used for multimodal investments.

Next Steps – RTP Update

- Update Chapter 3 with new section
 - NEW congestion pricing policies
- UPDATE other parts of the RTP
- REVIEW corridor refinement planning
- NEW equitable funding work

- 1) Mobility
- 2) Equity
- 3) Safety
- 4) Diversion
- 5) Climate
- 6) Emerging Technologies

Draft RTP Congestion Pricing Policies

- Policy 1** **Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
- Policy 2** **Equity**: Integrate equity and affordability into pricing programs and projects from the outset.

Draft RTP Congestion Pricing Policies

Policy 3 **Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.

Policy 4 **Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.

Draft RTP Congestion Pricing Policies

Policy 5 **Climate:** Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.

Policy 6 **Emerging Technologies:** Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Next Steps – RTP Update Schedule

7.28.22	JPACT/Council Workshop	Introduce Draft 2023 RTP Policy, Action Items
9.02.22	TPAC	Revised 2023 RTP Policy and Action Items
9.13.22	Council Work Session	
9.15.22	JPACT	
9.21.22	MTAC	
9.28.22	MPAC	

Coordination with Oregon Highway Plan Tolling Policy Amendment

- Metro and ODOT required to coordinate on the RTP and OHP through a "continuing, cooperative, and comprehensive (3 C)" planning process
- On-going coordination between Metro and ODOT staff
- RTP Update and OHP Tolling Policy Amendment occurring on parallel tracks
- Concurrent updates to Metro committees on RTP + OHP
- Align language and policy goals to the extent possible

Learn more about the **Regional Transportation Plan** at:

oregonmetro.gov/rtp

Alex Oreschak, RTP Congestion Pricing Policy Lead: alex.oreschak@oregonmetro.gov

Kim Ellis, RTP Project Manager: kim.ellis@oregonmetro.gov



MPAC



Garet Prior – Toll Policy Manager

Amanda Pietz – Policy, Data, and
Analysis Administrator

July 27, 2022

Urban Mobility Strategy Map


Currently Funded by HB2017

-  System Improvement Project
-  Bike/Ped Crossing Project

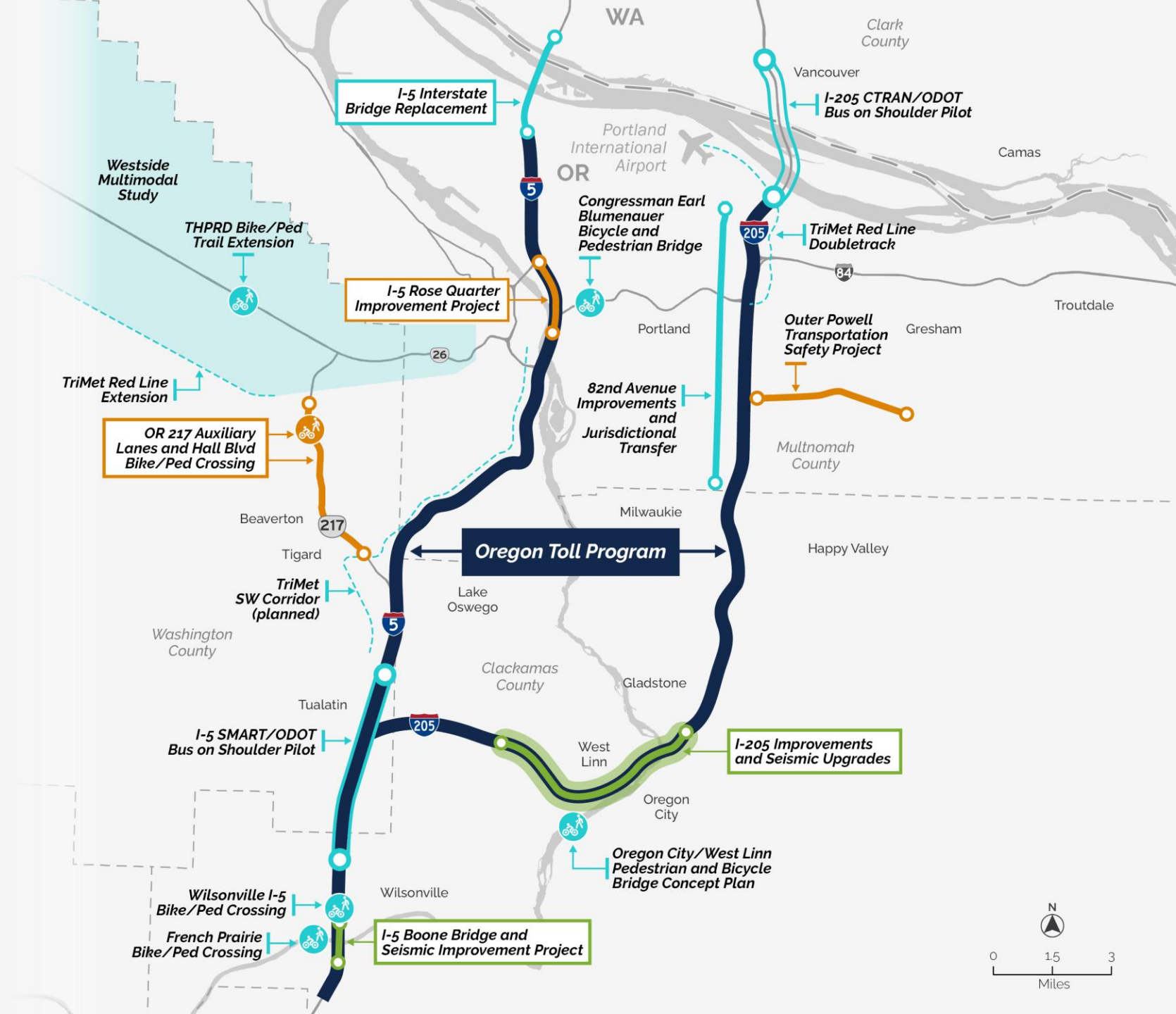
Made Possible with HB3055

-  System Improvement Project
-  Regional Mobility Pricing Project
-  I-205 Toll Project

Partner Project with ODOT Support

-  System Improvement Project
-  Bike/Ped Crossing Project
-  Bus on Shoulder Pilot
-  TriMet Project
-  Multimodal Study

Note: Core project names are boxed



All lanes, all electronic, no stopping



Low Income Toll Report

Options to Establish a Program for Drivers
Experiencing Low Incomes

Equity and Mobility Advisory Committee & Oregon Transportation Commission



- Neighborhood health and safety
- Low-income
- Transit and multimodal

Options for consideration

- **Provide a significant discount** (e.g., credits, free trips, percentage discount, or full exemption) for **households equal to or below 200% Federal Poverty Level**
- **Provide a smaller, more focused discount** (e.g., credits or free trips) for households above **201% and up to 400% of the Federal Poverty Level**
- Use a certification process that **leverages existing programs** for verification and **further explore self-certification**

Income Thresholds

2021 Federal Poverty Level (FPL)

Household	200% FPL	400% FPL
1	\$27,180	\$54,360
2	\$36,620	\$73,240
3	\$46,060	\$92,120
4	\$55,500	\$111,000
5	\$64,940	\$129,880
6	\$74,380	\$148,760
7	\$83,820	\$167,640
8	\$93,260	\$186,520
9	\$102,700	\$205,400
10	\$112,140	\$224,280
11	\$121,580	\$243,160
12	\$131,020	\$262,040
13	\$140,460	\$280,920
14	\$149,900	\$299,800

Source: U.S. Department of Health and Human Services. 2022. *HHS Poverty Guidelines for 2022*. <https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>

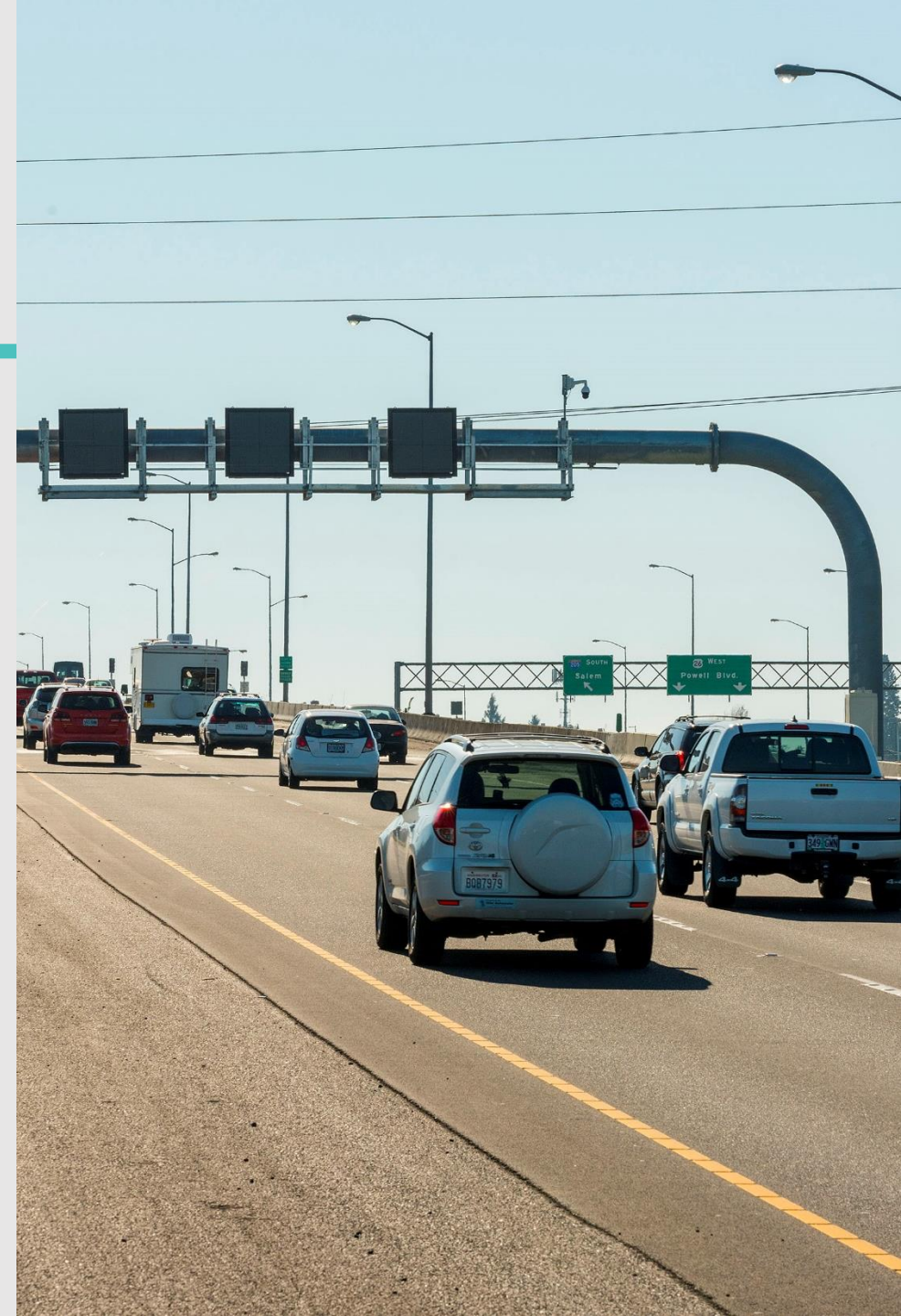
Next Steps

- **Gathering feedback on the draft report in June and July**
 - **What do you like?**
 - **What should be changed?**
 - **Is anything missing?**
- Summarize feedback and refine report – August
- Presentation to Oregon Transportation Commission at September meeting
- Deliver report to Oregon Legislature by September 15

Oregon Highway Plan Toll Policy Amendment

Overview

- Context
- Types of Road Pricing
- Road Pricing Objectives
- Rate Structures, Pricing Considerations, Exemptions and Discounts
- Use of Revenue
- Infrastructure and Management



Schedule



Initial Analysis of State and Regional Congestion Pricing and Toll Policies

Overview

- Many areas of agreement
- Areas of difference
- Fine-tuning

Next steps

- Public comment period extended to September 15 – please review the draft and email us your comments at OHPManager@odot.oregon.gov
- Regional Toll Advisory Committee to begin meeting in August
- Continue collaboration with Metro and regional policy update – presentations and discussion at Metro committees in September (TPAC, MTAC, MPAC, JPACT, and Metro Council)
- Final Oregon Highway Plan Toll Amendment prepared for the Oregon Transportation Commission’s November meeting