

# Agenda



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC)

Date: Friday, September 2, 2022

Time: 9:00 a.m. to 12:00 p.m.

Place: Virtual meeting held via Zoom

[Connect with Zoom](#)

Passcode: 042255

Phone: 877-853-5257 (Toll Free)

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9:00 a.m.	<b>Call meeting to order, declaration of quorum and introductions</b>	Chair Kloster
9:10 a.m.	<b>Comments from the Chair and Committee Members</b> <ul style="list-style-type: none"><li>• Committee input on Creating a Safe Space at TPAC (Chair Kloster)</li><li>• Updates from committee members around the Region (all)</li><li>• Monthly MTIP Amendments Update (Ken Lobeck)</li><li>• Fatal crashes update (John Mermin)</li><li>• Agenda for upcoming RTP Urban arterials JPACT/Council workshop (Chair Kloster)</li><li>• Regional Mobility Policy Next Steps (Kim Ellis)</li></ul>	
9:20 a.m.	<b>Public communications on agenda items</b>	
9:23 a.m.	<b>Consideration of TPAC minutes, August 5, 2022 (<u>action item</u>)</b>	Chair Kloster
9:25 a.m.	<b>Metropolitan Transportation Improvement Program (MTIP) Formal Amendment 22-5283 (<u>action item</u>, <u>Recommendation to JPACT</u>)</b> Purpose: For the purpose of adding new or amending existing projects in the 2021-26 Metropolitan Transportation Improvement Program (MTIP) to complete required phase slips and make required corrections to meet Fall obligations or Federal approval steps (SP23—1-SEP)	Ken Lobeck, Metro
9:40 a.m.	<b>25-27 Regional Flexible Funds Allocation (RFFA) Recommendation (<u>action item</u>, <u>Recommendation to JPACT</u>)</b> Purpose: Recommendation to JPACT on projects to be funded through RFFA	Dan Kaempff, Metro
10:25 a.m.	<b>Regional Transportation Plan (RTP) Vision, Goals &amp; Process Update</b> Purpose: Provide process update, review updates to vision and goals and share information on the Call for Projects.	Kim Ellis, Metro
10:55 a.m.	<b>Regional Transportation Plan (RTP) Pricing Policy Development</b> Purpose: Discuss revised draft 2023 RTP pricing policy language	Alex Oreschak, Metro
11:55 a.m.	<b>Committee comments on creating a safe space at TPAC</b>	Chair Kloster
12:00 p.m.	<b>Adjournment</b>	Chair Kloster

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមទូរសព្ទទូរសារកេហ្វអ៊ែរ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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

## 2022 TPAC Work Program

**As of 8/26/2022**

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

<p><b><u>September 2, 2022 9:00 am – noon</u></b></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> <li>• Creating Safe Space at TPAC (Chair Kloster)</li> <li>• Committee member updates around the Region (Chair Kloster &amp; all)</li> <li>• Monthly MTIP Amendments Update (Ken Lobeck)</li> <li>• Fatal crashes update (John Mermin)</li> <li>• Agenda for upcoming RTP Urban arterials JPACT/Council workshop (Chair Kloster)</li> <li>• Regional Mobility Policy Next Steps (Kim Ellis)</li> </ul> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• <b>MTIP Formal Amendment 22-5283</b> <u>Recommendation to JPACT</u> (Lobeck, 15 min)</li> <li>• <b>25-27 Regional Flexible Funds Allocation (RFFA)</b> <u>Recommendation to JPACT</u> (Dan Kaempff, Metro; 45 min)</li> <li>• RTP Vision, Goals &amp; Process Update (Kim Ellis, Metro; 30 min)</li> <li>• RTP Pricing Policy Development (Metro) (Alex Oreschak, Metro, 60 min)</li> <li>• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)</li> </ul>	<p><b><u>September 14, 2022 – TPAC Workshop 9:00 am – noon</u></b></p> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• 2023 RTP Financial Plan and Equitable Funding (Leybold, McTighe, 60 min)</li> <li>• Climate Smart Strategy Monitoring: Preliminary Results, Findings and Considerations (Kim Ellis, Metro, 60 minutes)</li> </ul>
<p><b><u>October 7, 2022 9:00 am – noon</u></b></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> <li>• Creating Safe Space at TPAC (Chair Kloster)</li> <li>• Committee member updates around the Region (Chair Kloster &amp; all)</li> <li>• Monthly MTIP Amendments Update (K. Lobeck)</li> <li>• Fatal crashes update (Lake McTighe)</li> </ul> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• <b>MTIP Formal Amendment 22-****</b> <u>Recommendation to JPACT</u> (Lobeck, 15 min)</li> <li>• <b>Earthquake Ready Burnside Bridge Resolution 22-****</b> <u>Recommendation to JPACT</u> (Kim Ellis; 20 min)</li> <li>• Regional Mobility Policy Update: Recommended Policy and Action Plan discussion (Kim Ellis, Metro/ Glen Bolen, ODOT/ Susie Wright, Kittelson &amp; Associates; 45 min)</li> <li>• Safe and Healthy Urban Arterials (John Mermin, Lake McTighe (30 min)</li> <li>• 2023 RTP Financial Plan and Equitable Funding (Ted Leybold, Lake McTighe, 60 min)</li> <li>• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)</li> </ul>	<p><b><u>October 19, 2022 – MTAC/TPAC Workshop 9:00 am – noon</u></b></p> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• RTP Needs Assessment Findings (Eliot Rose, Metro; 60 min)</li> <li>• TriMet Forward Together update (Tara O'Brien, TriMet; 30-45 min)</li> <li>• High Capacity Transit Strategy Update: Network Vision (Ally Holmqvist, Metro; 60 min)</li> </ul>

<p><b><u>November 4, 2022 9:00 am – noon</u></b></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> <li>• Creating Safe Space at TPAC (Chair Kloster)</li> <li>• Committee member updates around the Region (Chair Kloster &amp; all)</li> <li>• Monthly MTIP Amendments Update (Ken Lobeck)</li> <li>• Fatal crashes update (Lake McTighe)</li> </ul> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• <b>MTIP Formal Amendment 22-****</b> <u>Recommendation to JPACT</u> (Lobeck, 15 min)</li> <li>• <b>Regional Mobility Policy Update: Recommended Policy and Action Plan</b> <u>Recommendation to JPACT</u> (Kim Ellis, Metro/ Glen Bolen, ODOT/ Susie Wright, Kittelson &amp; Associates; 60 min)</li> <li>• <i>Rose Quarter Project update (Eliot Rose; 30 min)</i></li> <li>• Carbon Reduction Program Update (Ted Leybold/Grace Cho/Kim Ellis, Metro; 60 min)</li> <li>• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)</li> </ul>	<p><b><u>November 9, 2022 – TPAC Workshop 9:00 am – noon</u></b></p> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• Regional Freight Delay &amp; Commodities Movement Study (Tim Collins/Kyle Hauger, Metro; 75 min)</li> <li>• <i>82<sup>nd</sup> Avenue Project update (Elizabeth Mros- O'Hara, Metro/ City of Portland TBD; 30 min)</i></li> </ul>
<p><b><u>December 2, 2022 9:00 am – noon</u></b></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> <li>• Creating Safe Space at TPAC (Chair Kloster)</li> <li>• Committee member updates around the Region (Chair Kloster &amp; all)</li> <li>• Monthly MTIP Amendments Update (Ken Lobeck)</li> <li>• Fatal crashes update (Lake McTighe)</li> </ul> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• <b>MTIP Formal Amendment 22-****</b> <u>Recommendation to JPACT</u> (Lobeck, 15 min)</li> <li>• <b>MTIP Formal Amendment 22-****</b> <i>Rose Quarter Project</i> <u>Recommendation to JPACT</u> (Eliot Rose, 30 min)</li> <li>• RTP Call for Projects Update (Kim Ellis, Metro; 45 min.)</li> <li>• Climate Smart Strategy Update (Kim Ellis, Metro; 45 min.)</li> <li>• 2023 RTP Financial Forecast (Ted Leybold/Lake McTighe; 30 min)</li> <li>• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)</li> </ul>	<p><b><u>December 21, 2022 – MTAC/TPAC Workshop 9:00 am – noon</u></b></p> <p><b>Agenda Items:</b></p> <ul style="list-style-type: none"> <li>• <i>2024 Growth Management Decision Work Program (Ted Reid, 60 min)</i></li> </ul>

**Parking Lot: Future Topics/Periodic Updates**

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| <ul style="list-style-type: none"> <li>• Columbia Connects Project</li> <li>• Best Practices and Data to Support Natural Resources Protection</li> <li>• Regional Emergency Transportation Routes Update Phase 2 (John Mermin, Metro &amp; Carol Chang, RDPO)</li> <li>• Cost Increase &amp; Inflation Impacts on Projects</li> </ul> | <ul style="list-style-type: none"> <li>• DLCD Climate Friendly &amp; Equitable Communities Rulemaking (Kim Ellis, Metro)</li> <li>• Ride Connection Program Report (Julie Wilcke)</li> <li>• Get There Oregon Program Update (Marne Duke)</li> <li>• RTO Updates (Dan Kaempff)</li> <li>• Update on SW Corridor Transit</li> <li>• Multnomah County Earthquake Ready Burnside Bridge Project</li> </ul> |
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Agenda and schedule information E-mail: [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov) or call 503-797-1766.

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



# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: August 24, 2022  
To: TPAC and Interested Parties  
From: Ken Lobeck, Funding Programs Lead  
Subject: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments (during August 2022)

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## **BACKGROUND**

### **Formal Amendments Approval Process:**

Formal/Full MTIP Amendments require approvals from Metro JPACT& Council, ODOT-Salem, and final approval from FHWA/FTA before they can be added to the MTIP and STIP. After Metro Council approves the amendment bundle, final approval from FHWA and/or FTA can take 30 days or more from the Council approval date. This is due to the required review steps ODOT and FHWA/FTA must complete prior to the final approval for the amendment.

### **Administrative Modifications Approval Process:**

Projects requiring only small administrative changes as approved by FHWA and FTA are completed via Administrative Modification bundles. Metro normally accomplishes one "Admin Mod" bundle per month. The approval process is far less complicated for Admin Mods. The list of allowable administrative changes are already approved by FHWA/FTA and are cited in the Approved Amendment Matrix. As long as the administrative changes fall within the approved categories and parameters, Metro has approval authority to make the change and provide the updated project in the MTIP immediately. Approval for inclusion into the STIP requires approval from the ODOT. Final approval into the STIP usually takes between 2-4 weeks to occur depending on the number of submitted admin mods in the approval queue.

### **End-of-Year (EOY) Slips Amendment:**

This monthly amendments reports includes a list of the projects that required phase slips to FFY 2023. Phase slips are allowable to complete as administrative modification. Some projects that required a phase slip also needed other corrections or updates. These changes were completed as part of separate administrative modifications. The phase slips/project corrections began during May 2022 and have continue through the August 2022 admin modifications. Finally, several transit projects that required phase slips to FFY 2023 also needed significant funding adjustments which were above FTA's 30% threshold for cost changes that can occur administratively. These projects and their required changes are moving forward as part of the September FFY 2023 Formal Amendment.

### MTIP Formal Amendments

No formal/full MTIP amendments were submitted during August 2022

### Administrative Modifications

#### August 2022 Administrative Modification Bundle #1 AM22-26-AUG1

Key	Lead Agency	Name	Change
22317	ODOT	I-5: Interstate Bridges Bearing Replacement (Portland)	<b>ADVANCE PHASE:</b> The Administrative Modification advances the PE and Construction phases from FFY 2023 to FFY 2022 to meet obligation needs.

#### August 2022 Administrative Modification Bundle #2 AM22-27-AUG2

Key	Lead Agency	Name	Change
22407	Washington County	Washington County Regional ATC Controller Project	<b>SFLP CONVERSION:</b> The Administrative Modification converts the 2019 TSMO awarded project with Metro STBG funds to ODOT approved State SFLP funds.
21128	ODOT	US30: Watson Rd - Hoge Ave	<b>ADD PHASE:</b> Add ROW phase with \$70k of local funds and slip Cons to FFY 2024
20812	Portland	Brentwood Darlington Bike/Ped Improvements	<b>COST INCREASE:</b> Add \$282,483 of local funds to ROW phase and advance ROW to FFY 2022. Correct UR to reflect early obligation in FFY 2022 as well.

#### August 2022 Administrative Modification Bundle #3 AM22-28-AUG3

Key	Lead Agency	Name	Change
20814	Portland	Jade and Montavilla Multi-modal Improvements	<b>ADVANCE PHASE:</b> Advance and increase ROW for a total of \$802,423. Added federal is STBG from the Construction phase with local funds used to backfill the construction phase. Revise project total is now \$8,160,115 which equals a 5.38% cost change and is less than the 20% threshold

## August 2022 Administrative Modification Bundle #4 (EOY Phase Slips Amendment)

### AM22-29-AUG4

ODOT Key	MTIP ID	Lead Agency	Project Name	Phase	Year	Fund Type	Fed	Match	Over	Total	Action
19276	70674	Clackamas County	Jennings Ave: OR 99E to Oatfield Rd	Cons	2022 2023	STBG-U	\$ 2,149,994	\$ 246,076	\$ -	\$ 2,396,070	Slip Cons to FFY 2023
22139	71089	Clackamas County	Trolley Tr Bridge: Portland Ave-Clack River Greenway Tr	Planning	2022 2023	STBG-U	\$ 1,228,800	\$ 140,642	\$ -	\$ 1,369,442	Slip Planning to FFY 2023
21621	7175	Clackamas County	S Redland Rd: OR213 - Springwater Rd (Clackamas County)	PE	2022 2023	HSIP	\$ 35,117	\$ 2,963	\$ -	\$ 38,080	Slip PE to FFY 2023
22576	71269	Milwaukie	Monroe St: SE 21st Ave - 34th Ave (Milwaukie)	Cons	2022 2023	HB2017	\$ -	\$ -	\$ 1,547,633	\$ 1,547,633	Slip Cons Phase to FFY 2023
22137	71093	Multnomah County	Sandy Blvd: Gresham to 230th Ave	Planning	2022 2022 2023	STBG-U	\$ 1,275,985	\$ 146,042	\$ -	\$ 1,422,027	Slip Planning Phase Back to FFY 2023
21884	71202	Multnomah County	Morrison St.: Morrison (Willamette River) Bridge (Portland)	PE	2022 in STIP 2023 in MTIP	State-STBG	\$ 1,604,929	\$ 183,691	\$ -	\$ 1,788,620	Slip PE in STIP to FFY 2023. MTIP already reflects PE in FFY 2023. No MTIP Action is needed.
21598	70871	ODOT	OR224: SE 17th Ave - SE Rusk Road	ROW	2022 2023	AC-NHPP	\$ 85,243	\$ 9,756	\$ -	\$ 94,999	Slip ROW Phase to FFY 2023
22321	71227	ODOT	Oregon Transportation Network - TriMet FFY22	Other/Transit	2022 2023	STBG-State	\$ 3,735,416	\$ 427,535	\$ -	\$ 4,162,951	Slip Other Phase to FFY 2023
22551	71266	ODOT	US26: SE Powell Blvd & SE 36th Ave	ROW	2022 2023	Local	\$ -	\$ -	\$ 90,000	\$ 90,000	Slip ROW Phase to FFY 2023

21710	71196	ODOT	US30: Troutdale (Sandy River) Bridge	ROW	2022 2023	STBG-State	\$ 35,267	\$ 4,036	\$ -	\$ 39,303	Slip ROW Phase to FFY 2023
21600	71154	ODOT	Portland Metro/Surrounding Area Traffic Monitoring & Control	Other	2022 2023	STBG-State	\$ 628,110	\$ 71,890	\$ -	\$ 700,000	Slip Other Phase to FFY 2023
21603	71157	ODOT	Portland Metro and Surrounding Areas Traffic Signal Upgrades	Cons	2022 2023	State - Gen	\$ -	\$ -	\$ 200,000	\$ 200,000	Slip Cons Phase to FFY 2023
21604	71158	ODOT	Portland Metro and Surrounding Areas Pavement Marking	Cons	2022 2023	State - Gen	\$ -	\$ -	\$ 200,000	\$ 200,000	Slip Cons Phase to FFY 2023
21605	71159	ODOT	Portland Metro and Surrounding Areas Signal Detection	Cons	2022 2023	State - Gen	\$ -	\$ -	\$ 200,000	\$ 200,000	Slip Cons Phase to FFY 2023
21609	71163	ODOT	Portland Metro and Surrounding Areas Traffic Monitoring Cameras	Cons	2022 2023	STBG-State	\$ 578,759	\$ 66,242	\$ -	\$ 645,001	Slip Cons Phase to FFY 2023
21618	71172	ODOT	Portland Metro & Surrounding Area Audible Crosswalk Signals	Cons	2022 2023	State - Gen	\$ -	\$ -	\$ 200,000	\$ 200,000	Slip Cons Phase to FFY 2023
21601	71155	ODOT	Portland Metro and Surrounding Areas Variable Message Signs	PE	2022 2023	STBG-State	\$ 294,707	\$ 33,731	\$ -	\$ 328,438	Slip PE phase to FFY 2023
21616	71170	ODOT	OR99W:N Schmeer Rd - SW Meinecke Pkwy & US30B: Kerby-165th	ROW	2022 2023	HSIP	\$ 69,856	\$ 5,893	\$ -	\$ 75,749	Slip ROW Phase to FFY 2023
21617	71171	ODOT	OR8: SE Brookwood Ave - OR217	ROW	2022 2023	NHPP	\$ 28,199	\$ 3,228	\$ -	\$ 31,427	Slip ROW Phase to FFY 2023

20333	70948	ODOT	Seventies Neighborhood Greenway	Cons	2022 2023?	STBG-State	\$ 1,625,866	\$ 186,088	\$ 2,261,877	\$ 4,073,831	Slip Cons Phase to FFY 2023
22448	71243	Portland	Local Traffic Signal Controller Replacement	Other	2022 2023	STBG-U	\$ 840,435	\$ 96,192	\$ -	\$ 936,627	Slip Other phase to FFY 2023
18837	70778	Portland	NE Columbia Blvd: Cully Blvd and Alderwood Rd	ROW	2022 2023	STBG-U	\$ 193,304	\$ 22,125	\$ -	\$ 215,429	Slip ROW phase to FFY 2023
				ROW	2022 2023	STBG-State	\$ 1,237,904	\$ 141,684	\$ -	\$ 1,379,588	
20812	70877	Portland	Brentwood Darlington Bike/Ped Improvements	ROW	2022 2022	TA-U	\$ 528,090	\$ 60,443	\$ -	\$ 588,533	No action now required. ROW and UR/Other advanced to FFY 2022
				UR/Other	2023 2022	TA-U	\$ 44,865	\$ 5,135	\$ -	\$ 50,000	
20814	70884	Portland	Jade and Montavilla Multi-modal Improvements	ROW	2023 2022	TA-U	\$ 193,075	\$ 22,098	\$ -	\$ 215,173	No action now required. ROW advanced to FFY 2022
						STBG	\$ 526,939	\$ 60,311	\$ -	\$ 587,250	
				Other	2023	Local	\$ -	\$ -	\$ 50,000	\$ 50,000	
				Cons	2023	STBG-U	\$ 1,768,475	\$ 202,410	\$ -	\$ 1,970,885	
21624	71178	Portland	West Burnside/NW 22nd Vicinity Pedestrian Signal	PE	2022 2023	AC-HSIP	\$ 105,712	\$ 8,918	\$ -	\$ 114,630	Slip PE phase to FFY 2023

AMT 22-24-JUL2

20870	70900	SMART	SMART Bus and Bus Facilities- (Capital)-2020 SMART 3 CNG Expansion Bus Purchase (5339 2020)	Other/ Transit	2022 2023	5339	\$ 53,644	\$ 13,411	\$ -	\$ 67,055	Slip completed as part of July #2 Admn Mod AM-22-24-JUL2
22180	71209	TriMet	TriMet Bus and Rail Preventive Maintenance (2022)	Other/ Transit	2022	5337	\$ 38,223,758	\$ 9,555,940	\$ -	\$ 47,779,698	No Slip Funding adjustments made in July #1 Admin Mod
22183	71212	TriMet	Enhanced Seniors Mobility/Individuals w/Disabilities (2022) 5310	Other/ Transit	2022 2023	5310	\$ 1,961,709	\$ 490,427	\$ 151,464	\$ 2,603,600	Slip and Funding Adjustments Completed as part of July #1 Admin Mod
22543	71268	Troutdale	North Beavercreek Bridge Replacement	Other	2022 2023	Rec Trails	\$ 150,000	\$ 37,500	\$ 509,860	\$ 697,360	Slip Other Phase to FFY 2023



# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: August 25, 2022  
To: Transportation Policy Advisory Committee (TPAC), Metro Technical Advisory Committee (MTAC) and interested parties  
From: Lake McTighe, Principal Transportation Planner  
Subject: July 2022 Report - Traffic Deaths in the three counties

The purpose of this memo is to provide a monthly update to TPAC, MTAC and other interested parties on the number of people killed in traffic crashes in Clackamas, Multnomah and Washington Counties in 2022. <sup>1</sup>

In August, four people died in traffic crashes in the region, all in Multnomah County. So far this year, at least 73 people have died in traffic crashes. Thirty-seven percent of the traffic deaths were pedestrians.

There are typically several factors that contribute to the seriousness of crashes. These include speed, driver behavior, roadway design and vehicle size; when crashes occur at higher speeds and/or when larger vehicles are involved there is a greater likelihood of the crash being serious.

## Traffic crash deaths in Clackamas, Multnomah and Washington Counties

Source: ODOT preliminary crash report as of 8/24/22, and police and news reports

Fatalities	Name, age	Mode(s) of travel	Roadway	County	Date
73					
1	Unidentified person	motorcycling	SE Foster Rd.	Multnomah	8/14
1	Unidentified person	driving	I-205	Multnomah	8/11
1	Unidentified person	walking	I-84	Multnomah	8/7
1	Unidentified person	walking	Alley by 2208 SE 82nd Ave	Multnomah	8/3
1	Paul Jason Mcfarland, 50	motorcycling (Vespa)	SE MLK Blvd & SE Division St	Multnomah	7/16
1	Unidentified person	driving	NE Cornfoot Rd.	Multnomah	7/27
1	Unidentified person	bicycling	NE Halsey St & NE Fairview Blvd, Fairview	Multnomah	7/30
1	Erik Eugene Ash, 46	driving	S Sconce Rd near Hwy 170	Clackamas	7/16
1	Procoro Hidalgo-Lozaro, 84	walk	SW Gaarde St W of 99W	Washington	7/23
2	Kody Hansen, 24 and Dale Herrin, 45	driving	Hwy 30, Portland	Multnomah	7/23
2	Unidentified persons, 17 and 15	driving	SE Wildcat Mountain Dr, near Sandy	Clackamas	7/20
1	Unidentified person	driving	NE Marine Dr.	Multnomah	7/18
1	Unidentified person	walking	SE Holgate Blvd & SE 100th Ave	Multnomah	7/16
1	Unidentified person	driving	Sundial Rd.	Multnomah	7/14

<sup>1</sup> Metro develops this memo using fatal crash information from the Preliminary Fatal Crash report provided by the Oregon Department of Transportation (ODOT) Transportation Data Section/Crash Analysis and Reporting Unit, as well as news and police reports. See the [Oregon Daily Traffic Toll](#) for additional information on ODOT data.

# Metro monthly traffic fatalities report

Fatalities	Name, age	Mode(s) of travel	Roadway	County	Date
1	Unidentified person	bicycling	N Juneau St & N Chautauqua Blvd	Multnomah	7/10
1	Daniel Slattery, 23	driving	NW Tanasbourne Dr/NE Stucki Ave.	Washington	7/3
1	Robert Hunker, 57	motorcycling	NE Kerkman Rd	Washington	6/22
1	Unidentified woman	driving	NE Columbia Blvd & NE Alderwood Dr	Multnomah	6/16
1	James Sheehan, 57	motorcycling	Hwy 99E	Clackamas	6/15
1	Maksim Mishuk, 24	motorcycling	I-84/ NE Fairview Pkwy & 207th Conn	Multnomah	6/13
1	Shana Keplinger, 32	wheelchair (pedestrian)	NE 162nd near NE Glisan St	Multnomah	6/11
1	Michael Eugene Sprague, 71	bicycling	NE Glisan St & NE 100th Ave	Multnomah	6/7
1	Unidentified	walking	82nd Ave & Se Center St	Multnomah	6/6
1	Unidentified person	driving	NE102nd Ave just south of NE Prescott St., Portland	Multnomah	5/31
1	Unidentified woman	driving	US 30/NW Yeon Ave, Portland	Multnomah	5/27
1	Bianca Ceperich, 16	driving	New Era Rd	Clackamas	5/20
1	Gwendolyn E. Brake, 83	walking	Molalla Ave & Warner Milne Rd	Clackamas	5/6
1	Unidentified person	motorcycling	US 26 Mt Hood Hwy	Multnomah	5/14
1	Unidentified person, 52	walking	I5-Ramp to Morrison Bridge, Portland	Multnomah	5/8
1	Shane Johnson, 43	motorcycling (e-dirt bike)	SE Powell/SE 50th, Portland	Multnomah	5/4
1	Tufa Shuka, 41	driving	Gaffney Ln & Berta Dr, Oregon City	Clackamas	5/4
1	David Carl Paulsen, 36	motorcycling	SE 208th Ave & SE Stark St, Portland	Multnomah	5/3
1	Joseph Dubois, 44	driving	Hwy 30, just south of St. John's Bridge, Portland	Multnomah	4/30
1	Andrew Michael Bachman, 21	driving	N Columbia Blvd & N Peninsular Ave, Portland	Multnomah	4/30
2	Matthew Amaya, 17 and Juan Pacheco Aguilera, 16	driving	SW Tualatin Valley Hwy and SW Murray Blvd	Washington	4/27
1	Wendy Falk, 52	driving	Hwy 211 near Eagle Creek	Clackamas	4/14
1	Luis Angel Sanchez-Gutierrez, 23	walking (skateboarding)	Tualatin Valley Hwy & SW 198th Ave	Washington	4/19
1	Michael Philip Frainey, 52	walking	SW Barrows Rd/ SW160th St	Washington	4/11
1	Angela C. Boyd, 47	walking	SE Powell Blvd/SE 47th Ave	Multnomah	4/4
1	Michael Scott Fields, 64	driving	Washington St & Agnes Ave	Clackamas	3/22
1	Catherine M Jarosz, 70	walking	SW Hall Blvd & SW Farmington Rd	Washington	3/15
1	Unidentified	bicycling	SW Rood Bridge Rd & SW Burkhalter Rd	Washington	3/15
1	Donald William Sharpe, 24	driving	S Springwater Rd Nnear S Spring Creek Rd	Clackamas	3/3
1	James Martin, 35	motorcycling	N Vancouver Ave & NE Columbia Blvd.	Multnomah	3/24

## Metro monthly traffic fatalities report

Fatalities	Name, age	Mode(s) of travel	Roadway	County	Date
1	Raymond M. McWilliams, 58	wheelchair	NE Vancouver Way & NE Gertz Road	Multnomah	3/18
1	Karen R. Kain, 57	walking	SW Hall Blvd & SW Lucille Ct.	Washington	3/4
1	Laysea Mykal Liebenow, 22	driving	US 30 Lower Columbia River HWY	Multnomah	3/7
1	Patrick Heath Bishop, 46	walking	SE Division St	Multnomah	3/3
1	Catherine McGuire Webber, 89	walking	SW Highland Dr & SW 11th St	Multnomah	1/3
1	Anthony Dean Ward, 55	driving	Firwood Rd near Cornog Rd	Clackamas	2/6
1	Clayton Edward Briggs, 48	driving	SE Sunshine Valley Rd	Clackamas	2/12
1	Alexander Lee, 23	walking	I-84	Multnomah	2/17
1	Cedar C. Markey-Towler, 41	walking	SE Foster	Multnomah	2/25
2	Unidentified (Double), 11, 16	walking	SW Edy Rd & SW Trailblazer Pl	Washington	2/20
1	Jade Dominic Pruitt, 51	motorcycling	OR211 Eagle Creek-Sandy HWY & SE Eagle Creek Rd.	Clackamas	2/18
1	David N Wickham, 43	motorcycling	NE Glisan St. & NE 87th Ave.	Multnomah	2/16
1	Unidentified	motorcycling	I-5	Multnomah	2/5
1	Liam David Ollila, 26	walking	I-5	Multnomah	1/31
1	Duane M Davidson, 56	walking	SE Divison St & SE 101st Ave	Multnomah	1/29
1	Norman Ray Sterach Jr., 34	motorcycling	OR99E	Clackamas	1/28
1	Awbrianna Rollings, 25	walking	US26 SE Powell	Multnomah	1/22
1	Douglas Joseph Kereczman, 40	driving	OR99E SE McLoughlin	Multnomah	1/20
1	Marcos Pinto Balam, 30	walking	OR99E	Clackamas	1/16
1	Unidentified	walking	I-205	Multnomah	1/13
1	Kyle M. Beck, 35	walking	I-5	Multnomah	1/12
1	Mark Wayne Barnette, 60	driving	OR213	Multnomah	1/9
1	Unidentified	walking	NE Alderwood Rd/ NE Cornfoot Rd	Multnomah	1/3
1	Levi S. Gilliland, 33	driving	NE Glisan St & NE 56th Ave	Multnomah	1/3
1	Salvador Rodriguez-Lopez, 34	driving	I-5	Multnomah	1/2

### A note on crash data

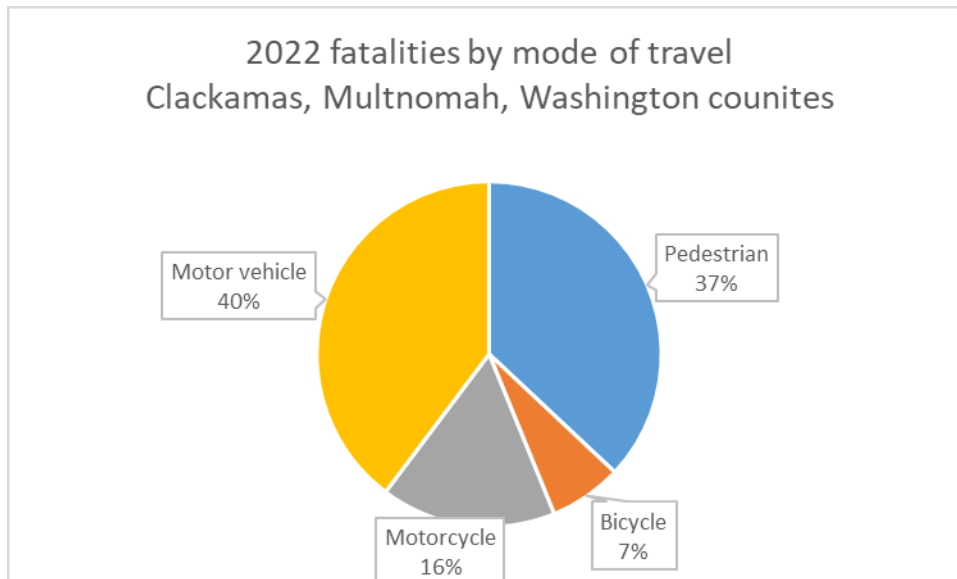
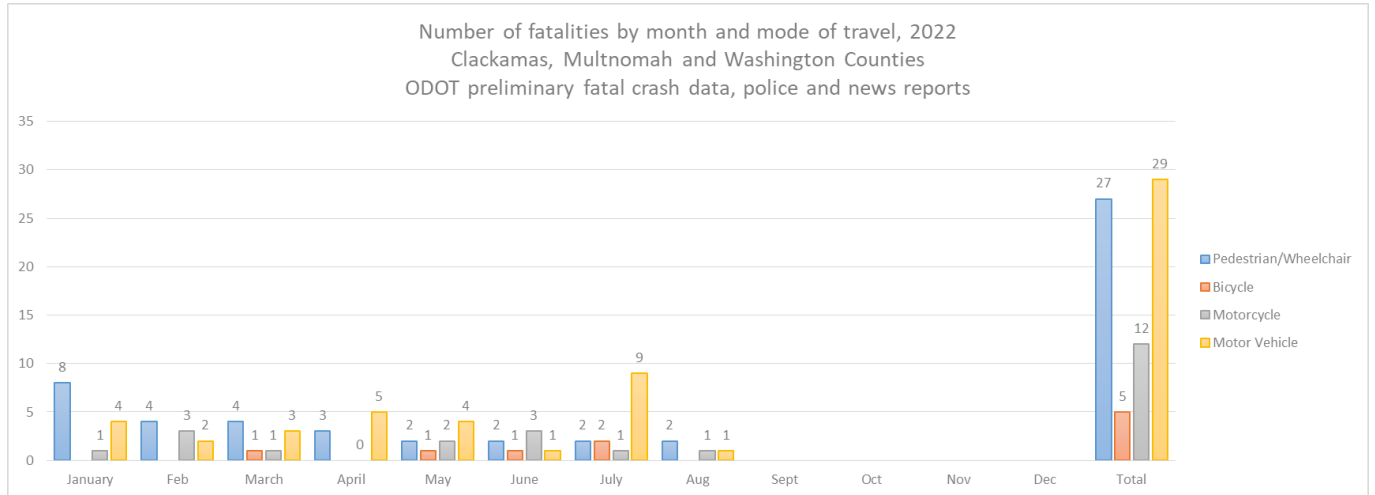
Metro includes the names of traffic crash victims included in this report based on the most recently available traffic crash data compiled by the Oregon Department of Transportation (ODOT), as well as police and news reports. ODOT compiles the official crash record for the state using traffic crash investigations and self-reported information. Metro follows national traffic crash reporting criteria, which the Portland Bureau of Transportation also uses. The criteria excludes people who die under the following circumstances:

- More than 30 days after a crash,
- Intentionally (suicide),
- In an act of homicide (a person intentionally crashes into another person),
- In a crash not involving a motor vehicle,

## Metro monthly traffic fatalities report

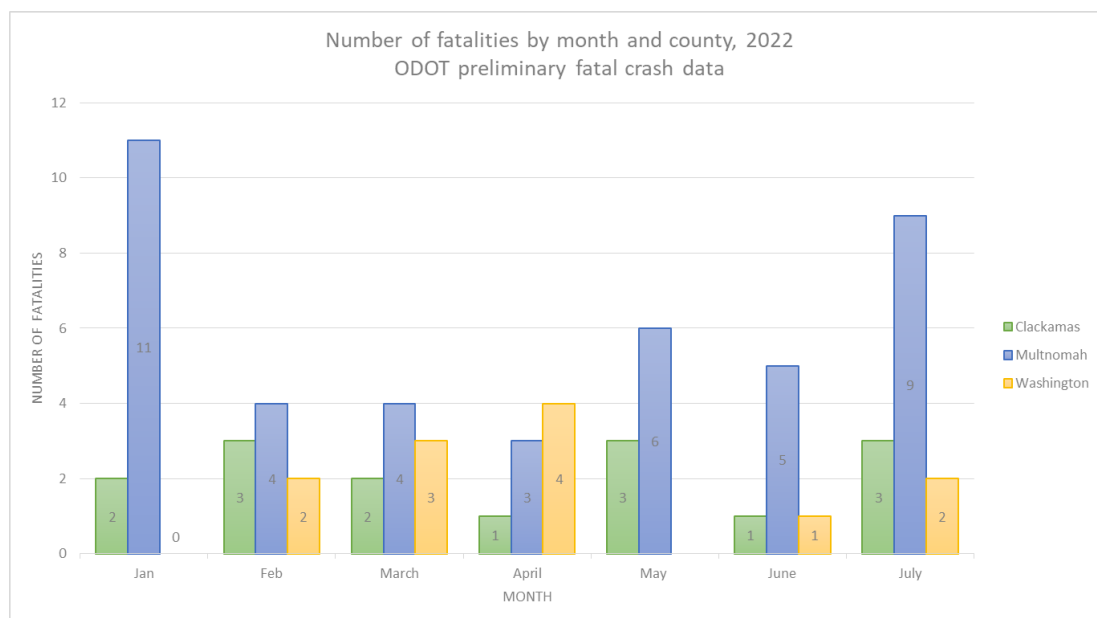
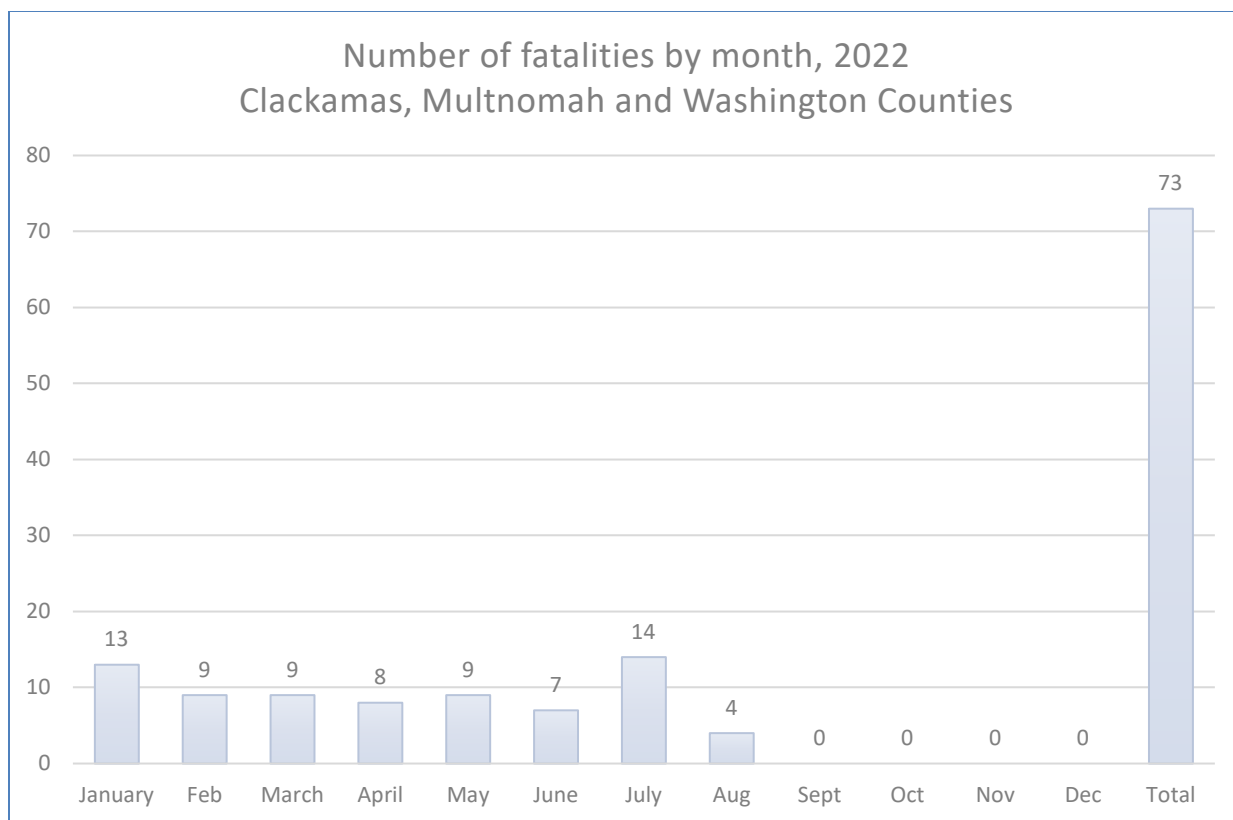
- From a prior medical event (e.g. a heart attack or drug overdose), or
- In a crash in a parking lot

**Source for all charts: ODOT preliminary crash report as of 8/24/22 and news and police reports**

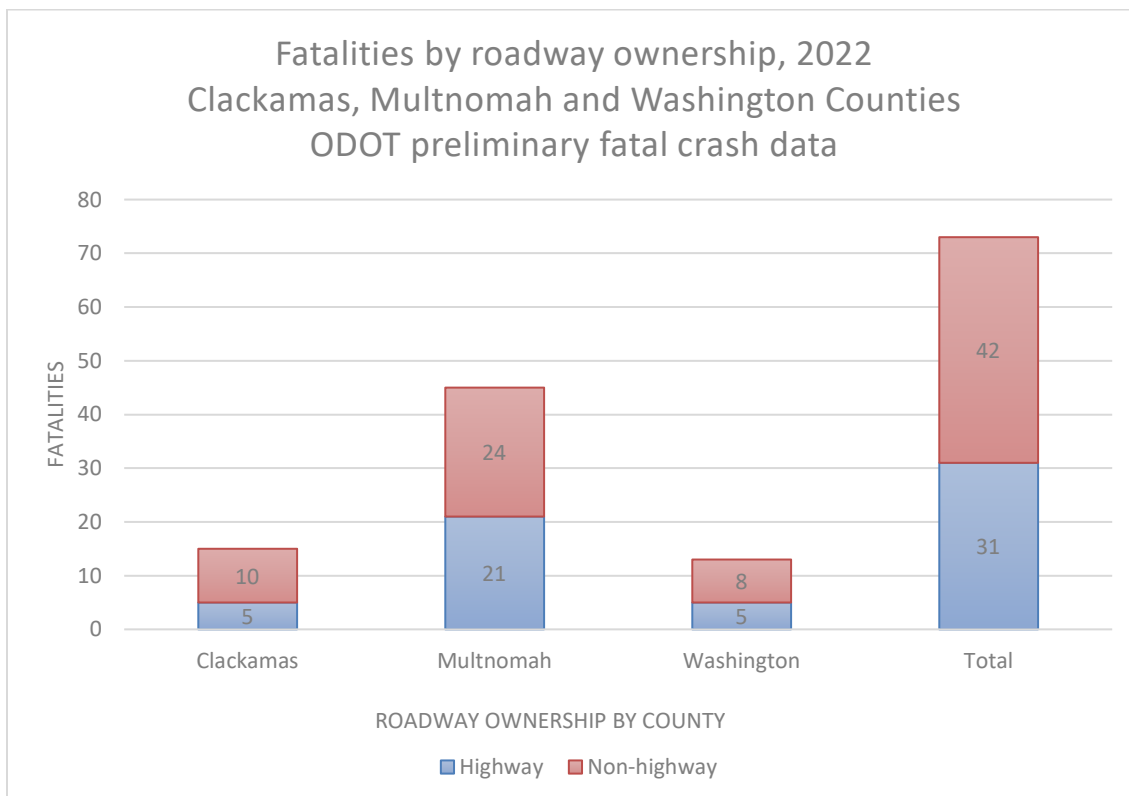
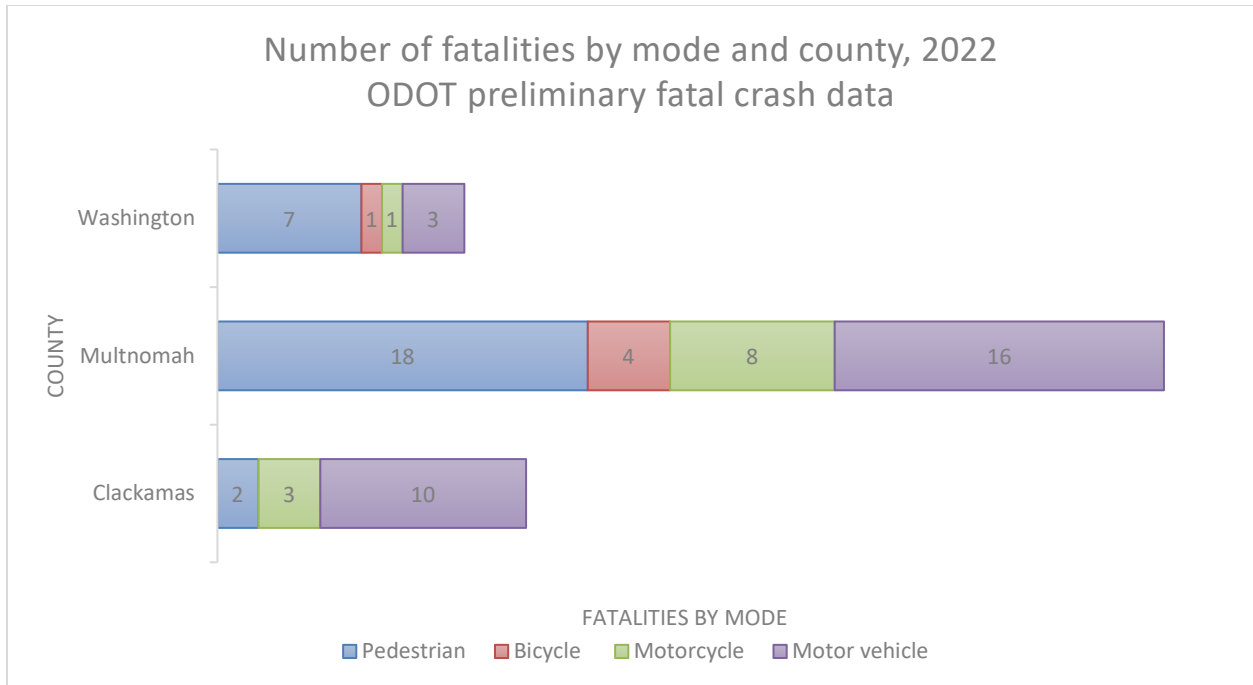




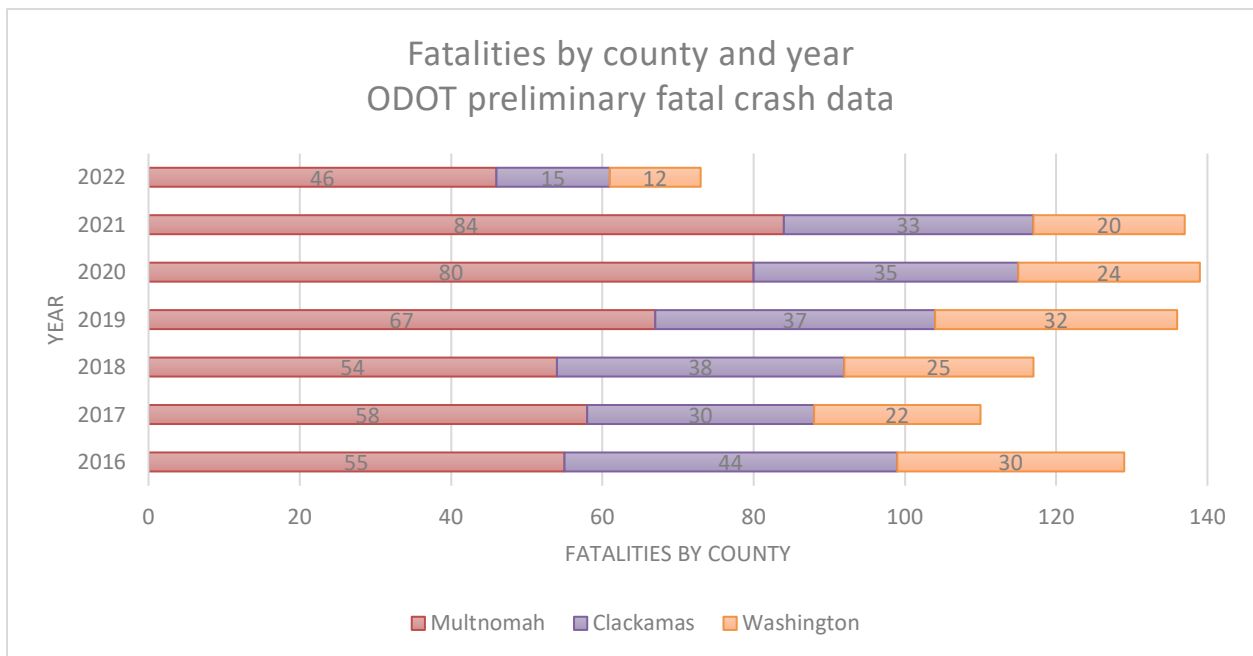
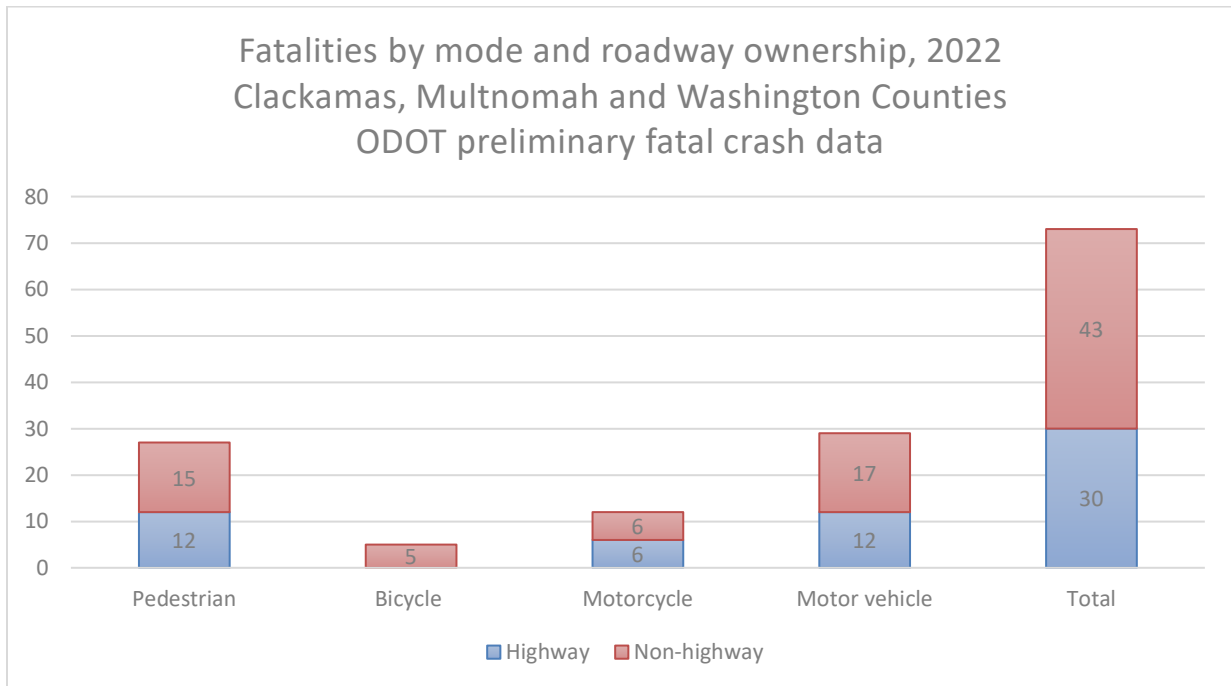
## Metro monthly traffic fatalities report



## Metro monthly traffic fatalities report



## Metro monthly traffic fatalities report



## August traffic deaths in Clackamas, Multnomah and Washington counties \*

*\* ODOT preliminary fatal crash report as of 8/24/22, police and news reports*

Unidentified person, motorcycling, SE Foster Rd., Portland, Multnomah, 8/14

Unidentified person, driving, I-205, Multnomah, 8/11

Unidentified person, walking, I-84, Multnomah, 8/7

Unidentified person, walking, alley by 2208 SE 82nd Ave., Portland, Multnomah, 8/3

Paul Jason Mcfarland, 50, motorcycling (Vespa), SE MLK Blvd & SE Division St. Portland, Multnomah, 7/16

Unidentified person, driving, NE Cornfoot Rd., Multnomah, 7/27

Unidentified person, bicycling, NE Halsey St & NE Fairview Blvd, Fairview, Multnomah, 7/30

Erik Eugene Ash, 46, driving, S Sconce Rd near Hwy 170, Clackamas, 7/16





# Safe and healthy urban arterials

*Urban arterials are roadways where people live, work, and play. In many of greater Portland's most racially and ethnically diverse communities, urban arterials are home to vibrant businesses, affordable housing, parks and schools. Some of these roadways are also major car and freight truck routes and serve some of the busiest buses. Investments along urban arterials are critical to implementing the region's shared vision.*

## Purpose

Urban arterials are an important part of the 2023 Regional Transportation Plan (RTP). This document summarizes a policy brief – that describes existing conditions, existing policies, challenges and policy considerations related to urban arterials.

Urban arterials (illustrated below on Map 1) usually connect to regional centers and freeways, and are critical to the transit network. They typically have speeds of at least 35 mph with four or more travel lanes and they carry tens of thousands of vehicles per day. They also serve as major freight truck routes and connect to industrial areas within and outside of the region. These complex and important corridors require a new approach to coordinated planning and investment in order to address their unique needs.

## Why is a new approach needed?

### **Land use and economic development**

The [2040 Growth Concept](#) imagines urban arterials as well-developed community centers. However, safety, design and zoning issues can hinder economic development.

### **Equity**

About two-thirds of urban arterial mileage is in areas with higher populations of people of color and people with lower incomes. Decades of underinvestment has led to increased safety and health issues that disproportionately impact these communities. Air and noise



pollution and urban heat islands affect people near these roads. Improving urban arterials is important to advancing equity in the region.

### **Mobility**

Many people in the region get where they need to go every day using urban arterials.

Dedicated right of way for buses and improved bicycle and pedestrian infrastructure, among other improvements, can improve mobility along these roads.

### **Safety**

Urban arterials account for more than forty percent of serious and fatal crashes while representing only five percent of the roadway miles within the region. These roads are more dangerous due to a combination of high traffic speeds and volumes, more lanes, a mix of travel modes and auto-oriented design and land uses. These safety issues are exacerbated for pedestrians and bicyclists.

## Why now?

The region has a strong history of collaboration among transportation agencies and land use authorities, as well as a comprehensive policy framework laid out in the Regional Transportation Plan. However, several challenges still stand in the way of significant progress on urban arterials.

The region's vision for these arterials can be achieved with a coordinated regional effort to address safety challenges and an approach for funding deficits and improving and maintaining these roadways.

*Note: Map 1 is included for illustrative purposes. Updates to the 2023 RTP motor vehicle functional classifications map will likely include new major arterials and other changes to the motor vehicle functional classifications.*

## Challenges

<b>Policy and design</b>	<b>Funding</b>	
Improving urban arterials can be	Improving urban arterials can be	Decades of work has led to many successes in improving safety along

There are many ongoing challenges in achieving safe and complete streets. As the functions and visions for urban arterials shift, many state-owned arterials now no longer serve their stated functional purpose. This creates ‘orphan highways’ – roadways in which it is not clear who is leading their improvement effort. Further, design standards and state laws tend to prioritize motor vehicle throughput over multimodal designs and safety improvements for pedestrians and bicyclists. This makes it difficult to make progress on many issues relating to urban arterials.

expensive and complex, especially for smaller jurisdictions. Oftentimes capital and maintenance needs are greater than available funding. Urban arterials have no dedicated funding sources. Additionally, there is a lack of identified or prioritized projects that comprehensively address the gaps and deficiencies along urban arterials.

***Building on what is working***  
The Portland region has a long history of investments and collaboration among state, regional, and local transportation agencies.

successes in improving safety along urban arterial corridors. Coordinated investment areas planning, the 2020 regional transportation funding measure, and updates to the Regional Mobility Policy have created a strong foundation for future work.

**Moving forward**  
Regional leaders will be exploring new options on how to address the challenges on urban arterials. This will shape the 2023 RTP update and guide a new approach to urban arterials. For more information please refer to the [Safe and Healthy](#)

**Funding** Decades of work has led to many

***Funding***

Improving urban arterials can be expensive and complex, especially for smaller jurisdictions. Oftentimes capital and maintenance needs are greater than available funding. Urban arterials have no dedicated funding sources. Additionally, there is a lack of identified or prioritized projects that comprehensively address the gaps and deficiencies along urban arterials.

Decades of work has led to many successes in improving safety along urban arterial corridors. Coordinated investment areas planning, the 2020 regional transportation funding measure, and updates to the Regional Mobility Policy have created a strong foundation for future work.

**Moving forward**

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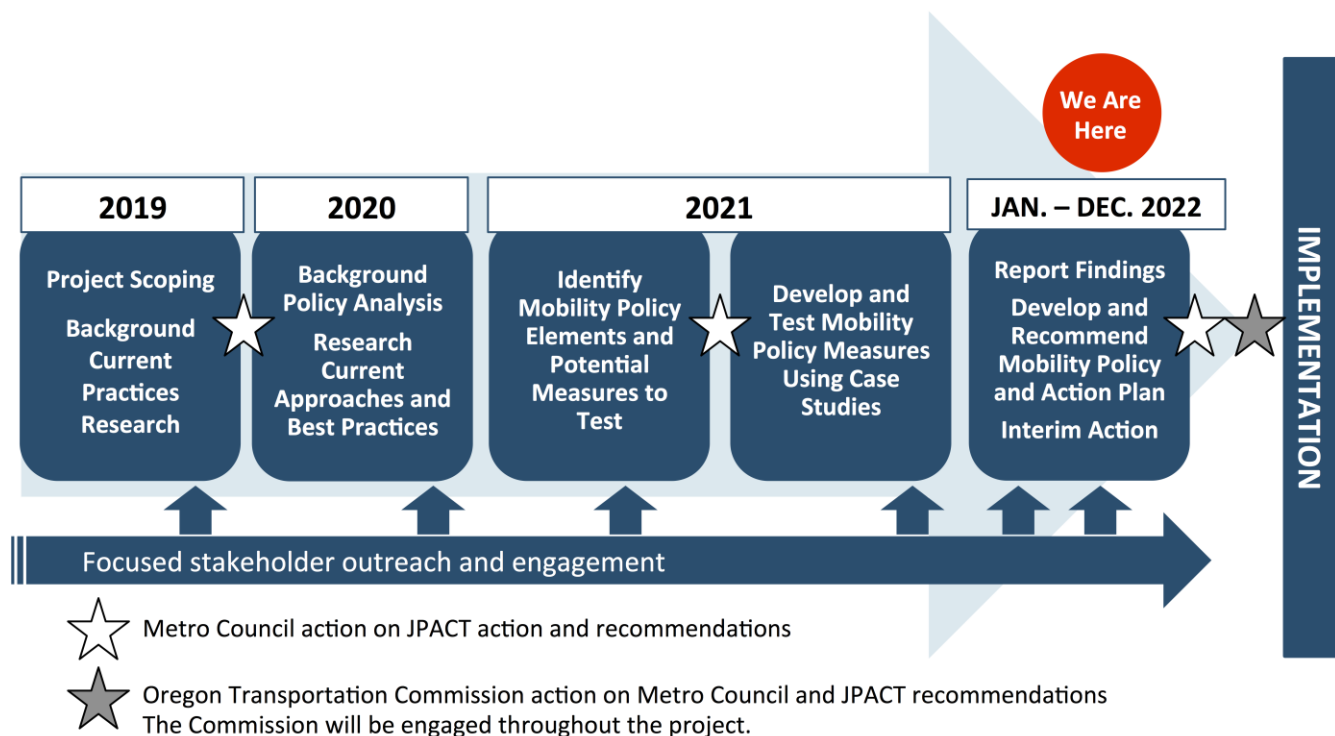
## Moving forward

## Moving forward

Regional leaders will be exploring new options on how to address the challenges on urban arterials. This will shape the 2023 RTP update and guide a new approach to urban arterials. For more information please refer to the [Safe and Healthy Urban Arterials 2023 RTP Policy Brief](#).

# REGIONAL MOBILITY POLICY UPDATE

## PROJECT TIMELINE AND 2022 ENGAGEMENT SCHEDULE



What	Who	Date
<b>January to July 2022 – Develop Draft Mobility Policy and Measures/Targets</b>		
Report case studies analysis and findings	TPAC/MTAC Workshop	2/16/22
Introduce draft mobility policy elements and performance measure recommendations	TPAC Workshop	3/9/22
	Practitioner Forum (with breakouts)	4/7/22
	TPAC/MTAC Workshop	4/20/22
Discuss:	EMCTC TAC	5/4/22
	EMCTC	5/16/22
- Draft policy framework and applicability	CTAC	6/2/22
- Draft measures, targets and methods	TPAC/MTAC Workshop	6/15/22
- Draft implementation action plan	Metro Council	7/26/22

What	Who	Date
<b>August to November 2022 – Recommend Draft Mobility Policy, Measures/Targets and Action Plan</b>		
Recommended Draft for 2023 RTP - Mobility policy (with measures and targets) and applicability - Implementation Action Plan	TPAC/MTAC workshop (with other practitioners)	8/17/22
	Region 1 Area Commission on Transportation	10/3/22 (requested)
	TPAC discussion	10/7/22
	Metro Council discussion	10/18/22
	JPACT discussion	10/20/22
	TPAC recommendation to JPACT	11/4/22
Report study findings and policy recommendations and seek support to incorporate in 2023 RTP	Oregon Transportation Commission	11/17/22 (requested)
Seek support to incorporate in 2023 RTP	JPACT recommendation/interim action	12/15/22
Seek support to incorporate in 2023 RTP	Metro Council recommendation/interim action	12/15/22

### County Coordinating Committees

Who	Tentative Date
East Multnomah County Transportation Committee TAC	8/31/22
Clackamas County TAC	9/1/22
Washington County Coordinating Committee TAC	10/17/22
East Multnomah County Transportation Committee (policy)	10/17/22
Washington County Coordinating Committee (policy)	Oct. (requested)
Clackamas County C-4 subcommittee (policy)	Oct. (requested)



# Meeting minutes



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

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

Date/time: Friday, August 5, 2022 | 9:00 a.m. to 12:00 p.m.

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

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## **Members Attending**

Tom Kloster, Chair  
Karen Buehrig  
Allison Boyd  
Chris Deffebach  
Lynda David  
Jaimie Lorenzini  
Tara O'Brien  
Karen Williams  
Laurie Lebowsky-Young  
Lewis Lem  
Idris Ibrahim  
Katherine Kelly

## **Alternates Attending**

Jamie Stasny  
Sarah Paulus  
Mark Lear  
Peter Hurley  
Dayna Webb

## **Members Excused**

Eric Hesse  
Jay Higgins  
Don Odermott  
Chris Ford  
Jasmine Harris  
Rob Klug  
Shawn M. Donaghy  
Jeremy Borrego  
Rich Doenges

## **Guests Attending**

Andre Lightsey-Walker  
Carly Rice  
Chris Smith  
Cindy Dauer

## **Affiliate**

Metro  
Clackamas County  
Multnomah County  
Washington County  
SW Washington Regional Transportation Council  
City of Happy Valley and Cities of Clackamas County  
TriMet  
Oregon Department of Environmental Quality  
Washington State Department of Transportation  
Port of Portland  
Community Representative  
City of Vancouver

## **Affiliate**

Clackamas County  
Multnomah County  
City of Portland  
City of Portland  
City of Oregon City and Cities of Clackamas County

## **Affiliate**

City of Portland  
City of Gresham and Cities of Multnomah County  
City of Hillsboro & Cities of Washington County  
Oregon Department of Transportation  
Federal Highway Administration  
Clark County  
C-Tran System  
Federal Transit Administration  
Washington Department of Ecology

## **Affiliate**

The Street Trust  
City of Gresham  
  
Tualatin Hills Park & Recreation District

### **Guests attending, (continued)**

Cody Field	City of Tualatin
Francesca Jones	Portland Bureau of Transportation
Jean Senechal-Biggs	City of Beaverton
Jessica Pelz	Washington County
Matchu Williams	
Mike McCarthy	City of Tualatin
Neelam Dorman	
Seth Brumley	Oregon Department of Transportation
Terry Kearns	
Tova Peltz	Oregon Department of Transportation
Will Farley	City of Lake Oswego
One unidentified caller	

### **Metro Staff Attending**

Ted Leybold, Resource & Dev. Manager	Kim Ellis, Principal Transportation Planner
Dan Kaempff, Principal Transportation Planner	Grace Cho, Senior Transportation Planner
Lake McTighe, Regional Transportation Planner	Cindy Pederson, Research Center Manager
Matthew Hampton, Senior Transportation Planner	Caleb Winter, Senior Transportation Planner
Robert Spurlock, Senior Transportation Planner	Ally Holmqvist, Senior Transportation Planner
Margi Bradway, Dep. Director PD& Research	Andrea Pastor, Senior Regional Planner
Connor Ayers, Legislative Coordinator	Matthew Flodin, PD&R Intern
Shannon Stock, Program Assistant	Marie Miller, TPAC Recorder

### **Call to Order, Declaration of a Quorum and Introductions**

Chair Kloster called the meeting to order at 9:00 a.m. Introductions were made. A quorum of members present was declared. Committee members, member alternates, guests, public and staff were noted as attending. Reminders where Zoom features were found online was reviewed. Input was encouraged for providing safe space for everyone at the meeting via the link in chat. Comments would be shared at the end of the meeting.

### **Comments from the Chair and Committee Members**

- **Updates from committee members and around the Region**  
Chris Deffebach announced that Andy Back will retire August 12 after 30 years of service with the Washington County Planning & Development Services Division, the last 10 years serving as Director. Erin Wardell has been appointed Interim Director and in addition will continue managing her planning group at this time.
- **Monthly MTIP Amendments Update** (Ken Lobeck) Chair Kloster referred to the memo in the packet provided by Ken Lobeck on the monthly submitted MTIP formal amendments submitted during July 2022. For any questions on the monthly MTIP amendment projects you may contact Mr. Lobeck directly.
- **Fatal crashes update** (Lake McTighe) The monthly update was provided on the number of people killed in traffic crashes in Clackamas, Multnomah and Washington Counties in 2022. In July, ten people died in traffic crashes in in the region. Six in Multnomah County, two in Clackamas County and two in Washington County. So far this year, at least 65 people have died in traffic crashes. Thirty-nine percent of the traffic deaths were pedestrians.

Mark Lear asked if the number of unidentified fatalities was unusual. Ms. McTighe noted notifying the next of kin, and time needed with crash investigations caused a delay for individuals to be identified for reports.

- **2018 RTP Completed Projects** (Kim Ellis) The summary memo in the packet reports on the Regional Transportation Plan (RTP) projects that have been completed since 2018 or for which construction will be completed by December 2023. Metro staff will update the project status of each of these projects in the RTP Project Hub to reflect they are completed and as a result no longer need to be included in the RTP project list.

Chris Deffebach asked if it was possible to summarize total local funding vs state or federal funding on projects completed list. It could inform future discussions on federal, state funding when it comes to revenue forecasts.

- **2023 RTP Schedule Update** (Kim Ellis) It was noted the RTP timeline and anticipated schedule for Metro Council and regional advisory committees briefings schedule was included in the packet. A further update on this will be provided at the MTAC/TPAC August 17 workshop.
- **Climate Expert Panel Report from June 22** (Kim Ellis) It was noted the video and summary from the Climate Expert Panel forum have been posted online. Other materials were included in the packet.
- **Recommended Oregon Highway Plan map amendments from Jurisdictional Transfer Study** (Chair Kloster) The report was provided on behalf of John Mermin. The 2020 Regional Framework for Highway Jurisdictional Transfer project included a work element for the project consultant to review the function of existing state highways in the Portland region for consistency with their current Oregon Highway Plan (OHP) classification. The consultant analyzed the function of all the highways in comparison to their existing classifications and recommended downgrading the OHP classification of four highways. These recommended actions are detailed in the packet memo. For further feedback direct questions to John Mermin.

**Public Communications on Agenda Items** – none received

**Consideration of TPAC Minutes from July 8, 2022**

Jaimie Lorenzini asked that minor edits/typos be accepted that she will submit as part of the motion.

**MOTION: To approve minutes from July 8, 2022.**

Moved: Jamie Lorenzini

Seconded: Karen Buehrig

**ACTION: Motion passed to include the minor edits/typos, with one abstention; Karen Williams.**

**Regional Flexible Funds Allocation (RFFA) and Trails Bond draft staff recommendations** (Dan Kaempff & Robert Spurlock, Metro) Dan Kaempff and Robert Spurlock presented information on draft funding recommendation options for Regional Flexible Funds/Parks Bond. Examples of possible funding packages were described that would result from using project outcomes ratings along with public input, sub regional priorities and additional information to select projects. The examples are intended to show comparisons of using different approaches for project selection of how to balance regional priorities with local considerations and the available funding.

**Equity + Safety Baseline** – A baseline example is shown to illustrate a funding package derived from funding projects in ranked order of the averages of their Equity and Safety ratings. Projects are funded in order until there is insufficient funding available to fully fund the next project down the list. This leaves \$4.275 million unallocated in the Parks Bond package and \$4.07 million unallocated in the RFFA package.

**Example 1: Baseline, with Adjustments to Parks Bond projects** – This example illustrates a funding package for the Parks Bond based on cost adjustments and direction from Parks staff on how these funds should be allocated. In this example, all of the trails projects seeking funding from either source are funded, with some projects receiving reduced funding. As in the baseline, funding is allocated to the RFFA projects based on their outcomes ratings through the 57th Ave/Cully Blvd. project. There is \$4.07 million remaining, which is insufficient to fully fund the next project in line, 7th Ave. There are several projects requesting lower amounts which could be funded with the remaining funds.

**Example 2: Baseline, with top two priority projects funded** – Metro staff considered modifying the Bond Adjusted Baseline (Example 1) by ensuring each sub region’s first priority project is funded (for Washington County, the highest outcome rated project was included). However, the outcome of doing so is the same as the Parks Bond Adjusted Baseline Example 1 as all of the sub regional priority projects were already included. So for Example 2, Metro staff included each sub region’s top two priority projects into the funding package. For Washington County, Beaverton Creek Trail is assumed to be the second priority project based on its outcomes rating. Compared to Example 1, this package funds Sandy Blvd. and Willamette Falls Dr. and does not fund Fanno Creek Trail, MLK Blvd., and the Tigard – Lake Oswego Trail. There is \$1.46 million remaining, which is insufficient to fully fund the next project in line, Fanno Creek Trail. There are several projects requesting lower amounts which could be funded with the remaining funds. In this example, the project receiving the highest level of public input – Fanno Creek Trail – would not be funded. But the on-street project with the highest level of public input – Willamette Falls Drive – would be funded.

**Example 3: Baseline, with next best performing projects in Washington and Clackamas Counties** – Example 3 starts with the Example 1 Baseline and utilizes its remaining \$4.07 million to select the next two best performing and affordable projects located in the Washington and Clackamas sub regions. These two sub regions are potentially receiving proportionally less investment than the other two sub regions due to the total amount of funding they requested. Additionally, Allen Blvd was the next highest performing project of all remaining unfunded projects from Example 1 while Willamette Falls Blvd. is the second priority project of the Clackamas sub region and received the most public comments of any project in that sub region. In this example, no additional projects could be funded as it is \$147,000 over the forecasted available revenues. Metro staff feels this slight overage is close enough to the forecasted amount that it could be managed through MTIP programming adjustments.

Mr. Spurlock noted additional bond considerations to funding, which includes:

- Public comment
- Geographic balance and racial equity
- Cultural resources
- Preference not to federalize Bond funds
- Construction vs. project development (Bond must fund capital assets)

TPAC was requested to provide input to help develop a draft RFFA recommendation to JPACT for action in the September TPAC meeting. TPAC input in this meeting will also be considered in developing a staff recommendation for the Parks Bond funding, which will be presented to Metro Council in September.

Comments from the committee:

- Karen Buehrig acknowledged the work Metro staff has done preparing the recommendations for consideration. Interest was expressed for example 2 that shows how we can creatively invest in the region while also investing in equity and safety as two top priorities. Acknowledgement was given for the letter from the City of Fairview in support of funding with the Sandy Blvd. project, which is an important arterial with safety priority needed.
- Jaimie Lorenzini agreed with the benefits to projects such as Sandy Blvd. Regarding the un-allocated funding in the RFFA pool this is in scenario 2, it was suggested to be strategic with funding lower cost project development projects in consideration of the number of resources coming online now. Investing in project development would place the region in a more competitive position to leverage other funding in the future.
- Allison Boyd noted Multnomah County support with scenario 2. The East County Technical Advisory Committee gave support for this option. The County has 2 top priorities with RFFA projects and 2 top priorities with the Trails Bond funding. It was noted Sandy Blvd. was a big concern for the community with safety.
- Mark Lear appreciated the focus on safety and equity held with conversations at TPAC and JPACT. The City of Portland had a concern with example 2 where the MLK project that scored well in criteria listings was not funded. The City appreciates the outcome based focus of the examples, but more conversations may be needed to get us closer to where final recommendations are made.
- Chris Deffebach noted that WCC didn't rank options because it was thought all projects should be funded and balanced between construction and pipeline projects. If recommending option 2, some prioritizing has yet to be done for projects that are not funded. Washington County felt with the geographic parity a higher amount of un-allocated funds in scenario 2 should be provided to their projects. Fanno Creek Trail was suggested as one project for full funding. Other projects noted for funding discussion was Tigard and Allen Blvd. It was noted the community pass grant just opened which could provide opportunities for funding projects that are significant in the region.
- Mark Lear clarified for the minutes the City of Portland is not saying we support option 2 and then find a way to fund what little is left to make MLK work, but take the outcomes based approach and find an agreeable method of prioritizing projects with as much funding as possible to address safety and equity. Ms. Deffebach agreed with this approach noting further discussions on projects at TPAC and JPACT.
- Karen Buehrig asked what the next steps were from here. Would JPACT have the conversation next? Will TPAC have a proposed recommendation to consider at the September meeting?
- Mr. Kaempff noted the excel spreadsheet link in the packet. It was noted the funding estimates are exactly that; estimates. The range of funding available is \$47.4 million with some latitude of going over the estimated funding as past cycles have done. Mr. Leybold added this is a funding forecast based on our Federal authorization bill. Part of managing the process is assigning projects in the amount of money they need in phases each year. We are committed to making up the balance if short in the next allocation process. Mr. Kaempff added TPAC generally supports option 2, with further discussion on the recommendation from the City of Portland and Washington County. JPACT will discuss this next, then staff hopes to bring one recommendation for consideration to TPAC at their next meeting.
- Jamie Lorenzini requested that as part of the report to JPACT, express interest in developing a pipeline of projects with options.

- Karen Buehrig agreed with more input from the jurisdictions following the meeting to help develop the best option moving forward. It was felt helpful to start from a specific option to anchor projects, then understand options with the remainder of funds.
- Mark Lear understood Ms. Buehrig's comments but noted the City of Portland was not yet ready to start at option 2 as the base for the recommendation. We are still in the negotiation phase of discussions looking at all options.
- Tara O'Brien asked if the City of Portland and Washington County could provide a better explanation of negotiations for JPACT considerations.
- Chris Deffebach noted that WCCC thought that option 2 was a winner if the County could get the rest of funding to complete the Fanno Creek project as a priority, and supports the Allen Blvd. project. WCCC meets again and will discuss further prior to JPACT meeting for their input.

### **Region 1 draft 100% project list for the 2024-27 State Transportation Improvement Program (STIP)**

(Tova Peltz, Oregon Department of Transportation) Tova Peltz provided information on Region 1 draft 100% project list 2024-27 STIP. The STIP is a 4-year capital program for federal transportation funds. The 24-27 STIP covers federal fiscal years (FFY) 2024-2027, which start on October 1<sup>st</sup>. ODOT develops a STIP every three years. The FFY '24 is already programmed; the present effort focuses on FFY's '25, '26, '27.

The 2024-27 STIP began with the funding allocation process in 2020. Themes of initial STIP public input included support to increase Non-Highway funding to advance equity, address climate, and enhance accessibility and mobility for all, support for Fix-It investments and reluctance to cut spending on bridge and pavement preservation to avoid accelerating system deterioration, and support for Enhance Highway investments to reduce congestion and facilitate economic development.

The project selection process now underway includes financial analysis and project sequencing ("programming") which includes project scoping and inflation costs consideration with programming. The Region 1 STIP website link was shared with information on past, current and future STIPs, description of funding categories and draft project lists being scoped for the 24-27 STIP, information on the 24-27 STIP Highway Enhance Program, and STIP comment form.

The public engagement process for the 24-27 STIP timeline includes:

- Summer 2022: R1 shares draft 100% lists with regional stakeholders for review and input
- Late 2022 / Early 2023: Engagement opportunities statewide on full draft 100% STIP
- Summer 2023: OTC adopts 24-27 STIP

The 24-27 STIP 00% Draft List Notes includes noting the list is draft until OTC action in one year, numbers do not yet include UMO projects, totals include IIJA funds but not 82<sup>nd</sup> Avenue JT dollars, many programs are statewide and data driven, and some projects appear in both 21-24 and 24-27 STIP, with different phases. The draft 100% project list will be updated and appear on the webpage as changes are made.

Comments from the committee:

- Mark Lear acknowledged the work between ACT and JPACT in working together more productively in addressing these issues. Noting that from meetings around the state there is a question on how much progress we are making on equity. Region 1 and our MPO has the most concentration of diverse population. But are we allocating funding that reflects this for safety projects across geographic areas. A specific high crash area (Lombard/Denver) was noted for



such an example. Ms. Peltz noted she felt fortunate to be in conversations in how the state is addressing equity as this. How we distribute our resources to benefit communities that have been underserved regarding transportation infrastructure from a safety perspective is fairly new to ODOT. Region 1 is taking the lead in many ways addressing this. Difficult discussions with planned funds distributions are happening across the state and across planned programs.

- Karen Buehrig about the example with 2 enhanced projects on the 100% project list, if already adopted by OTC or if OTC would adopt all of the 100% list as a whole set. Ms. Peltz noted the whole list would be adopted by OTC, including the enhanced program projects. It was asked how the Great Streets program would be developed with the 100% list. Ms. Peltz noted the methodology is still being sorted out with ODOT. Each region will have their own ideas on how these are developed; some projects may be under construction and need more funding to complete, others may not currently be on the list but meet criteria and priorities.
- Peter Hurley noted the recently adopted rules with Climate Friendly and Equitable Communities by DLCD with significant changes regarding VMT reductions and capacity expansion projects. It was asked what ODOT is doing in regard to this with the STIP. Ms. Peltz noted she would find others to better answer this and forward the contact information. In development with the STIP there was a tool incorporated in scoping projects to evaluate climate methods. The evaluations are being analyzed including the 100% list projects for impacts and climate targets. It was suggested to invite the state climate office staff to TPAC to provide further information. It was noted the urban mobility projects were not included in the list. Why and when would they be included? Ms. Peltz noted they are still working on details with the projects. Based on programming requirements it is expected they'd be available sometime in September.
- Chris Deffebach asked what kind of comments would be most helpful beyond more funding for projects. Ms. Peltz noted at this point not much shifting of funds statewide is likely. What could be helpful, based on the project list, knowing if there are adjacent projects nearby on the local system or other projects in the works that are expected for future scoping. Discussion is already underway on the 2027-30 STIP. The more information learned about corridor improvements planned, and project design and constructed that add value to communities such as corridor-wide improvements with collaboration to get the work done is helpful.
- Ted Leybold noted the creation of the Great Streets program was part of the advocacy that came from this region for using discretionary funding with a comprehensive approach for corridor-wide safety programs. It was suggested that Region 1 help prioritize projects nominated and schedule time on a TPAC agenda with ODOT staff to discuss further.

**2024-2027 Metropolitan Transportation Improvement Program (MTIP) Performance Evaluation – Approach & Methods** (Grace Cho) Information was provided on the proposed approach to evaluating the 2024-2027 Metropolitan Transportation Improvement Program (MTIP). The performance evaluation of the 2024-2027 MTIP is organized by two tracks:

- Evaluating progress towards RTP priorities
  - Evaluating progress towards federal performance targets
- Each track has a proposed approach as they each have different requirements and/or guidelines in demonstrating federal compliance.

The 2024-2027 MTIP performance evaluation will take a multi-pronged approach to assess the four-year package of investments. The multi-pronged approach includes the following:

- Investment analysis of the 2024-2027 MTIP
- System performance analysis of the 2024-2027 MTIP towards RTP priorities

- Performance analysis towards federally mandated performance targets

#### Investment Analysis Evaluation Approach

The investment analysis will assess the level of investment the region plans to make across different categories over the next four years. Some category examples include: type (e.g. capital investment, planning, operations, preservation and maintenance), mode (e.g. active transportation, transit, roads and bridge, etc.). The investment analysis – to the extent practicable – will also compare investment across categories from the 2021-2024 MTIP and 2018 RTP to the current proposed MTIP. The analysis of the investment profile will provide general size, scale, and profile of the investment package to help place in context the performance of the four year program.

#### System Performance Evaluation Approach

The system performance evaluation will apply a similar approach to how the 2018 RTP evaluated the long-term package of investments. This means the evaluation will apply a system-wide analysis of the overarching investment program and transportation projects programmed in the MTIP will not be evaluated independently. The evaluation will primarily be a quantitative assessment focused on assessing the four RTP priority areas: safety, equity, climate, and mobility.

#### Federal Performance Target Evaluation Approach

As part of federal requirements, the performance evaluation of the 2024-2027 MTIP will also assess how the investment profile makes progress towards federally mandated performance targets. The federal performance target analysis will focus primarily in demonstrating how the mix of investments proposed for 2024 through 2027 advance the region towards achieving federal performance targets for asset management, environment, national highway system performance and freight mobility, and safety.

Next steps planned:

Fall 2022 – 2024-2027 MTIP project list finalizing and performance evaluation preparation

Winter 2022/2023 – Run MTIP performance evaluation, results, and develop initial findings

Spring 2023 – Report out results, release 2024-2027 MTIP public review draft, respond to public comment

Summer 2023 – 2024-2027 MTIP adoption

Comments from the committee:

- Laurie Lebowsky-Young noted looking at page 10 of the packet regarding Climate Performance Measures and saw that C-Tran stops were excluded and was wondering why. Ms. Cho will answer this as a follow up from the meeting.
- Chris Deffebach noted this analysis includes Federal, state and transit agencies projects, but seems to evaluate against our regional goals, objectives and targets. What projects are assumed to be included in the 24-27 cycle as the basis for the analysis? Ms. Cho noted the STIP includes regional significant projects in the region where part of the funding is local. The evaluation will include this subset of projects. Any missing regional project investments that are not seen with evaluations should be included in the context of the STIP to show the complete investments of projects. It was noted that long-range forecasting and work with RTP currently is helping provide current data for the evaluation.
- Karen Buehrig asked what have we learned from the previous cycle evaluation and helping us be more informed for this cycle. Ms. Cho noted our data showed our region is moving away from our safety targets despite increased funding as a top priority. As such this reflects in the emphasis on the RFFA project selections. The STIP evaluations inform us how we advocate at

other funding tables and discussions with OTC with funding categories and amounts. Information highlighted at MTIP evaluations provides leverage and tradeoffs for limited resources while also building on past cycles for better developed goals and targets.

- Tara O'Brien asked how the performance measures impacted not reaching our targets help inform future changes that may need to be made. Ms. Cho noted the mandated Federal performance targets that are required, but have some discretion with funding when targets are not made. Less explicit are targets from the RTP. The intent of the MTIP evaluation is to highlight now we are doing in that 4-year program. Interim strategies working toward ambitious goals can help evaluate progress.
- Karen Williams appreciated the proposed refinements to some of the measures, in particular looking at access to jobs and frequent transit for jobs. It was asked if part of the assessment took into account active transportation infrastructure and pedestrian access. Ms. Cho noted the system completeness measure applies in part to multiple priorities. Staff is looking at pedestrian infrastructure in the refinement phases with direction from regional connectivity policies. The access issues can be addressed in these completeness plans.

Ms. Williams noted in Table 6. Congestion Mitigation and Air Quality Program – Excessive Delay and Mode Share Targets percent of non-single occupancy vehicle (Non-SOV) travel increasing. It was asked where does this come from and why is it rising. Ms. Cho noted that due to the completion of State Implementation Plan (SIP) requirements in October 2017 and the region not being in violation of the National Ambient Air Quality Standards (NAAQS) for federally regulated criteria pollutants, the Portland region is no longer required to report on performance monitoring of the Excessive Delay and Mode Share targets. The region aims for an achievable target with projected growth, generally increased incrementally.

- Mark Lear thought we could be effective working on these evaluation elements to get to some level of sub-regional analysis feedback to our groups. Evaluation is not just studying what we're doing and need to do, but planning changes needed with time and schedules. Besides the Federal requirements, other factors for evaluation need to be analyzed, given the number of regional projects and local priorities. The trust between ODOT, agencies, jurisdictions and Metro is needed to make the RTP better than ever.

**TPAC member restructure update/material links between TPAC & JPACT** (Chair Kloster) The presentation shown was presented to Metro Council in June for a proposed approach for more meaningful and sustained community representation on TPAC. The committee's role with recommendations to JPACT, the work of the committee that has evolved over time, and community representation to date was reviewed.

Chair Kloster noted the challenges community members face serving on the committee, and recent equity efforts made to support members. The proposal brought to Metro Council included:

- To seek representatives from Community Based Organizations (CBOs) who can bring transportation experience and organizational capacity to the role
- Continued focus on bringing BIPOC representation to the committee
- Track participation for two years and consider further adjustments, if needed

At their June 21 meeting the Metro Council approved this approach and directed staff to proceed with a community member recruitment, as follows:

- New focus on CBOs for candidates

- Continued focus on racial equity and diversity
- Continue existing reforms (*stipends, safe space protocols, staff support and DEI training*)

The memo provided to Metro Council as the basis of the approach was added to the packet, providing further details.

Comments from the committee:

- Karen Williams asked about outreach and recruitment to youth serving on TPAC, with strategy planned to reach youth via High Schools or other educational institutions. Chair Kloster noted the CBOs were being recruited for their depth of knowledge and connection to community. Youth members often serve on CBO boards and could be recruited to TPAC this way also.
- Tara O'Brien asked about the role of alternates with CBOs, and how would recruitment significantly change this time around if changes are needed to the bylaws. How does this compare to MTAC? Chair Kloster noted MTAC bylaws are contained within MPAC bylaws, with specific positions and alternates spelled out. Depending on lessons learned this 2-year time, TPAC bylaws could be changed if needed for alternate designations. CBOs alternate roles are still being worked out. The emerging leaders section in the proposal: *three leadership development positions as alternates for the six community representatives whose primary role would be helping CBOs develop capacity in transportation advocacy at Metro and around the region* could help answer questions.
- Karen Buehrig suggested working with TPAC members to help in outreach and recruitment efforts with CBOs. It was suggested to find ways to access information easier, such as the meeting packet. Chair Kloster noted other help for new community members is possible prep meetings with packet run-throughs. Metro Council looks for geographic balance of representation from around the region on committee which will include this recruitment.
- Chris Deffebach appreciated having more voices at the TPAC table and offered to help with information shared on topics to prepare for productive discussions at TPAC.

Chair Kloster concluded the presentation with notation of Metro Council appointments for these new TPAC community members in December, and their terms starting in January 2023.

**Committee comments on creating a safe space at TPAC** (Chair Kloster) – Comment received:

*Could we please make transcripts savable? Thanks!*

No time remained on the agenda to address this issue.

### **Adjournment**

There being no further business, meeting was adjourned by Chair Kloster at 12:00 p.m.

Respectfully submitted,

Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC meeting, August 5, 2022

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1	Agenda	8/5/2022	8/5/2022 TPAC Agenda	080522T-01
2	TPAC Work Program	7/29/2022	TPAC Work Program as of 7/29/2022	080522T-02
3	Memo	7/26/2022	TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments (during July 2022)	080522T-03
4	Memo	7/29/2022	TO: TPAC and interested parties From: Lake McTighe, Regional Planner RE: July 2022 Report - Traffic Deaths in the three counties	080522T-04
5	Memo	7/29/2022	TO: TPAC and interested parties From: Kim Ellis, RTP Project Manager RE: Regional Transportation Plan (RTP) Projects Completed Since 2018	080522T-05
6	Handout	7/29/2022	2023 REGIONAL TRANSPORTATION PLAN Timeline and anticipated schedule for Metro Council and regional advisory committees briefings May to December 2022	080522T-06
7	Handout	N/A	Climate and transportation expert panel summary	080522T-07
8	Handout	6/22/2022	June 22, 2022 Climate Smart Expert Panel Registrant List	080522T-08
9	Handout	6/22/2022	2023 Regional Transportation Plan Climate and Transportation Expert Panel Presentation Slides	080522T-09
10	Memo	7/26/2022	TO: TPAC and interested parties From: John Mermin, Metro RE: Highway classification changes for consideration in Regional Transportation Plan (RTP) and Oregon Highway Plan (OHP) updates	080522T-10
11	Minutes	7/8/2022	Draft minutes from July 8, 2022 TPAC meeting	080522T-11
12	Memo	8/1/2022	TO: TPAC and interested parties From: Dan Kaempff, Principal Transportation Planner RE: Draft funding recommendation options for Regional Flexible Funds/Parks Bond	080522T-12
13	Comment letter	July 11, 2022	Clackamas County Coordinating Committee comments regarding Prioritization of the Regional Flexible Funds Allocation (RFFA) and Metro Parks Trail Bonds	080522T-13
14	Comment letter	July 29, 2022	City of Fairview comments regarding support Multnomah County's RFFA application	080522T-14

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
15	Links to spreadsheets	8/5/2022	Links to excel spreadsheets RFFA Technical Scores on projects and Bond examples	080522T-15
16	Handout	July 29, 2022	DRAFT 100% 2024-2027 STIP Projects, ODOT Region 1	080522T-16
17	Memo	8/5/2022	TO: TPAC and interested parties FROM: Grace Cho, Senior Transportation Planner RE: 2024-2027 MTIP – Performance Evaluation Approach and Methods	080522T-17
18	Slide	8/5/2022	July traffic deaths in Clackamas, Multnomah and Washington counties	080522T-18
19	Presentation	8/5/2022	Draft funding recommendation examples for 2025-2027 Regional Funding: RFFA + Parks Bond	080522T-19
20	Presentation	8/5/2022	Draft 100% List 2024-2027 Statewide Transportation Improvement Program	080522T-20
21	Presentation	8/5/2022	2024-2027 MTIP Performance Evaluation Approach	080522T-21
22	Presentation	8/5/2022	Community Voices at TPAC Proposed approach for more meaningful and sustained community representation	080522T-22
23	Memo	5/16/2022	TO: Council President Peterson, Metro Councilors From: Margi Bradway, Deputy Director, Planning, Development and Research Department RE: Community Representation on the Transportation Policy Alternatives Committee (TPAC)	080522T-23

BEFORE THE METRO COUNCIL

**FOR THE PURPOSE OF ADDING NEW OR  
AMENDING EXISTING PROJECTS IN THE 2021-  
26 METROPOLITAN TRANSPORTATION  
IMPROVEMENT PROGRAM (MTIP) TO  
COMPLETE REQUIRED PHASE SLIPS AND  
MAKE REQUIRED CORRECTIONS TO MEET  
FALL OBLIGATIONS OR FEDERAL APPROVAL  
STEPS (SP23-01-SEP)**

) RESOLUTION NO. 22-52XX  
)  
) Introduced by: Chief Operating Officer  
) Marissa Madrigal in concurrence with  
) Council President Lynn Peterson  
)  
)

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

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

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

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

WHEREAS, the September Formal Amendment represents required clean-up and positioning actions for fifteen projects to be ready for early Fall obligations or complete required federal approval steps; and

WHEREAS, the Oregon Transportation Commission (OTC) approved on July 14, 2022 their OR8 – East Lane project and Portland Metro and Surrounding Areas Safety Reserve project as part of their Annual STIP Amendment process allowing MTIP programming to now occur; and

WHEREAS, ODOT's OR8: East Lane project will provide needed pedestrian safety upgrades in the Cornelius area; and

WHEREAS, ODOT's Portland Metro and Surrounding Area Safety Reserve will provide a dedicated safety improvement funding bucket that Region 1 can draw from to address urgent safety improvements across Region 1; and

WHEREAS, Multnomah County received an ODOT Bridge Program federal funding award of \$16,909,486 originating from the Infrastructure Investment and Jobs Act (IIJA) which along with the local matching funds will enable the construction phase for the Broadway Bridge Deck Replacement project to be implemented during FFY 2023; and

WHEREAS, the Federal Transit Administration (FTA) provided a revised FFY 2022 formula fund apportionment affecting the Portland Oregon-Washington Urbanized Zone Area (UZA) which significantly increased the available FTA section 5307, 5310, 5337, and 5339 formula funding to the UZA resulting in a new and updated funding split among TriMet, SMART, and C-Tran; and

WHEREAS, upon completing the updated funding split among the UZA participants, and a fund exchange between SMART and TriMet, numerous projects for both in FFY 2022 and FFY 2023 now require funding corrections and revisions; and

WHEREAS, while the majority of the corrections were completed during the past summer as administrative modifications, several included changes beyond FTA's cost change threshold which triggered the need for a formal/full amendment that is now proceeding; and

WHEREAS, the September Formal MTIP Amendment is completing the remaining transit projects updates that require formal amendments enabling them to move forward during early FFY 2023 and obligate their funds through FTA's fund obligation process; and

WHEREAS, Regional Transportation Plan consistency check areas included financial/fiscal constraint verification, an assessment of possible air quality impacts, consistency with regional approved goals and strategies, and a reconfirmation that the MTIP's financial constraint finding is maintained a result of this amendment; and

WHEREAS, Metro's Transportation Policy and Alternatives Committee (TPAC) received their notification plus amendment summary overview, and recommended approval to Metro's Joint Policy Advisory Committee on Transportation (JPACT) on September 2, 2022; and

WHEREAS, JPACT approved Resolution 22-52XX consisting of the fifteen projects on September 15, 2022 and provided their approval recommendation to Metro Council; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the approval recommendation, made by JPACT that occurred on September 15, 2022, and approves Resolution 22-52XX to formally amend the 2021-26 MTIP to complete adding the three new projects, canceling SMART's 5310 project, and amending the remaining SMART and TriMet FFY 2023 transit projects ensuring federal approvals and fund obligations can then occur in a timely fashion.

ADOPTED by the Metro Council this \_\_\_\_ day of \_\_\_\_\_ 2022.

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Lynn Peterson, Council President

Approved as to Form:

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Carrie MacLaren, Metro Attorney



2021-2026 Metropolitan Transportation Improvement Program

**Exhibit A to Resolution 22-52XX**

September FFY 2023 Formal Transition Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: SP23-01-SEP

Total Number of Projects: 15

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
ODOT Key # <b>22609</b> MTIP ID TBD	ODOT	<b>OR8: East Lane (Cornelius)</b> (New Project)	Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross OR 8 in a highly trafficked crossing with high use of public transportation.	<b><u>ADD NEW PROJECT:</u></b> The Formal Amendment adds the OTC approved safety project to the MTIP
ODOT Key # <b>22613</b> MTIP ID TBD	ODOT	<b>Portland Metro and Surrounding Areas Safety Reserve</b> (New Project)	Funds to be available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah, and Washington counties.	<b><u>ADD NEW PROJECT:</u></b> The Formal Amendment adds the OTC approved safety project to the MTIP
ODOT Key # <b>22645</b> MTIP ID TBD	Multnomah County	<b>Broadway Bridge Deck Replacement</b> (New Project)	Replace the existing roadway deck, including streetcar rails on the bascule span. Replace all the existing mechanical and electrical components to provide a safe and durable riding surface for vehicles and light rail. (Br # 06757)	<b><u>ADD NEW PROJECT</u></b> The Formal Amendment adds the new project with ODOT Bridge program awarded funding.

ODOT Key # <b>20874</b> MTIP ID 70904	SMART	SMART Bus Purchase/PM/Amenities and Technology 2021	Maintenance and Bus Fleet Replacement and Software	<b><u>INCREASE FUNDS:</u></b> Increase authorized FTA Section 5307 funds to the project per updated UZA apportionments
ODOT Key # <b>22190</b> MTIP ID 71134	SMART	SMART Senior and Disabled Program (2022)	Services and Facility Improvements for Elderly and Disabled Customers	<b><u>CANCEL PROJECT:</u></b> Key 22190 is canceled as SMART has traded funds with TriMet. Key 22190 is no longer a project.
ODOT Key # <b>22191</b> MTIP ID 71139	SMART	SMART Bus and Bus Facilities (Capital) 2022	<del>Bus and Bus Facility Upgrades</del> <b>Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service</b>	<b><u>FUNDING AND DESCRIPTION:</u></b> Decrease authorize FTA section 5339 fund s and expand description per FTA guidance
ODOT Key # <b>22192</b> MTIP ID 71144	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	Maintenance and Bus Fleet Replacement and Software	<b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project per the updated UZA Apportionment letter
ODOT Key # <b>22193</b> MTIP ID 71135	SMART	SMART Senior and Disabled Program (2023)	<del>Services and Facility Improvements for Elderly and Disabled Customers</del> <b>Provides overall ADA &amp; para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.</b>	<b><u>DECREASE FUNDING:</u></b> Based on the updated UZA apportionment and the fund trade with TriMet, the FFY 2023 5310 funding for this project is being decreased.
ODOT Key # <b>22194</b> MTIP ID 71140	SMART	SMART Bus and Bus Facilities (Capital) 2023	<del>Bus and Bus Facility Upgrades</del> <b>Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service</b>	<b><u>SLIP &amp; FUNDING:</u></b> Decrease projected authorized 5339 funds and slip project to FFY 2024

<p>ODOT Key # <b>22195</b> MTIP ID 71145</p>	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2023	Maintenance and Bus Fleet Replacement and Software	<p><b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project</p>
<p>ODOT Key # <b>22196</b> MTIP ID 71136</p>	SMART	SMART Senior and Disabled Program (2024)	<p><del>Services and Facility Improvements for Elderly and Disabled Customers</del> <b>Provides overall ADA &amp; para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.</b></p>	<p><b><u>DECREASE FUNDING:</u></b> Based on the updated UZA apportionment and the fund trade with TriMet, the FFY 2023 5310 funding for this project is being decreased.</p>
<p>ODOT Key # <b>22198</b> MTIP ID 71146</p>	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2024	Maintenance and Bus Fleet Replacement and Software	<p><b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project</p>
<p>ODOT Key # <b>22164</b> MTIP ID 71103 (Note: New ODOT Key to be assigned)</p>	TriMet	<p><del>Transit Oriented Development (TOD) program (FFY 2023)</del> <b>Preventive Maintenance Support (FFY 2023)</b></p>	<p><del>Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2023 allocation year)</del> <b>Metro (RFFA Step 1) STBG/Local exchange supporting TriMet's Bus and Rail Preventative Maintenance program needs for labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's 3 county service district</b></p>	<p><b><u>SCOPE ADJUSTMENT &amp; ADVANCE:</u></b> The formal amendment advances the project from FFY 2025 to FFY 2023 and updates the project scope based on TriMet's planned use for the STBG funds</p>
<p>ODOT Key # <b>22181</b> MTIP ID 71210</p>	TriMet	TriMet Bus and Rail Preventive Maintenance (2023)	Capital Maintenance For Bus And Rail <b>for continued service</b>	<p><b><u>ADD FUNDING:</u></b> Increase authorized 5337 funds based on revised FFY 2023 FTA UZA estimates</p>

ODOT Key # <b>22184</b> MTIP ID 71213	TriMet	Enhanced Seniors Mobility/ Individuals w/Disabilities (2023) 5310	Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	<b><u>ADD FUNDING:</u></b> Increase authorized 5310 funds based on revised FFY 2023 FTA UZA estimates
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**2021-2027 MTIP Formal Amendment Exhibit A to Resolution 22-52XX**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete. OTC approval occurred to add the project on July 14, 2022.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Update Entry  
ADD NEW PROJECT**  
Add new OTC approved project to  
the MTIP

Lead Agency: ODOT		Project Type: Highway	ODOT Key: 22609	
Project Name: OR8: East Lane (Cornelius)	1	Fiscal Constraint Cat: SM&O	MTIP ID: NEW-TBD	
		ODOT Type: Safety	Status: 2	
Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)		Performance Meas: Safety	Comp Date: 12/31/2027	
		Capacity Enhancing: No	RTP ID: 12095	
		Conformity Exempt: Yes	CMP: Yes	
		30 Day Notice Begin: 8/30/2022	TCM: No	
		30 Day Notice End: 9/28/2022	TSMO Award: No	
		Funding Source: ODOT	TSMO Cycle: N/A	
		Funding Type: AC	RFFA ID: No	
		State Highway Route: OR 8	RFFA Cycle: N/A	
		Mile Post Begin: 15.20	UPWP: No	
		Mile Post End: 15.20	UPWP Cycle: N/A	
Short Description: Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross OR 8 in a highly trafficked crossing with high use of public transportation.		Length: 0.00	Past Amend: 0	
		Flex Transfer to FTA: No	Council Appr: Yes	
		FTA Conversion Code: N/A	Council Date: 10/6/2022	
		1st Year Program'd: 2023	OTC Approval: Yes	
		Years Active: 0	OTC Date: 7/14/2022	
		STIP Amend #: 21-24-2140		MTIP Amnd #: SP23-01-SEP

**Detailed Description:** On OR8/Baseline St, (Tualatin Valley Highway) at MP 15.20 in eastern Cornelius, install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross (OTC approval = Yes, 7/14/2022 - ODOT FY 2022 Annual Amendment)

**STIP Description:** Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross OR 8 in a highly trafficked crossing with high use of public transportation.

Last Amendment of Modification: None. Initial MTIP programming

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
<b>Federal Funds</b>								
AC-STBGS	ACP0	2023		\$ 190,800				\$ 190,800
AC-STBGS	ACP0	2023					\$ 709,200	\$ 709,200
								\$ -
Note: Federal share is set at 90%							<b>Federal Totals:</b>	<b>\$ 900,000</b>
<b>State Funds</b>								
State	Match	2023		\$ 21,200				\$ 21,200
State	Match	2023					\$ 78,800	\$ 78,800
								\$ -
Note: Required minimum match is set at 10%							<b>State Total:</b>	<b>\$ 100,000</b>
<b>Local Funds</b>								
								\$ -
								\$ -
							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 212,000	\$ -	\$ -	\$ 788,000	\$ 1,000,000
Total Project Cost Estimate (all phases):							\$	<b>1,000,000</b>
Year of Expenditure Cost Amount:							\$	<b>1,000,000</b>

#### Programming Summary Details

Why project is short programmed:

Phase Change Amount:	\$ -	\$ 212,000	\$ -	\$ -	\$ 788,000	\$ 1,000,000
Phase Change Percent:	0%	100%	0%	0%	100%	100%
Revised Match Federal:		\$ 21,200			\$ 78,800	\$ 100,000
Revised Match Percent:		10.00%			10.00%	10.00%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: Adds the new OTC approved ODOT safety improvement project on OR8 to the MTIP					
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, OTC item, project location map, and project cost estimation					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? Start = August 30, 2022 through September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? No					
6	Added clarifying notes: The project is part of the ODOT Annual Amendment to OTC in July 2022.					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Safety					
2A	Does the amendment include fiscal updates? Yes, - initial fund programing of \$1 million for the project					
2B	What is the funding source for the project? ODOT funding programs					
2C	Was the Proof-of Funding requirement satisfied and how? July 2022 OTC item with project funding and approval request.					
2D	Was overall fiscal constraint demonstrated? Yes					

**RTP Consistency Check Areas**

1A	RTP ID and Name: ID# 12095 - Safety & Operations Projects
1B	RTP Project Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, per Table 2
2B	What is the exception category per the regulation: Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? Not applicable. The project is exempt from modeling requirements
4	What RTP Goal does the project fit under? Goal 5 - Safety and Security. Goal Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No.

**UPWP Consistency Check Areas**

1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? N/A
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? N/A

**Other Review Areas**

1	Is the project location identified on the National Highway System (NHS), and what is its designation?
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes Motor Vehicle and Pedestrian networks
2B	What is the Metro modeling designation? Major Arterial in the Motor Vehicle network and Pedestrian Parkway in the Pedestrian network
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No



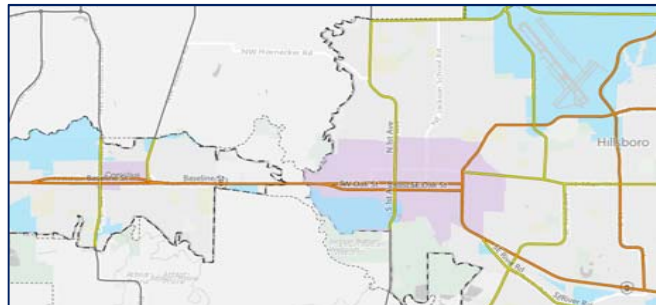
### Fund Type Codes References

ADVCON	A general Federal Advance Construction fund type placeholder used by ODOT when the expected federal fund code (e.g. HSIP, NHPP) is not available or designated yet. ODOT covers the initial expenditures allowing the phase obligation to occur. Later the federal conversion fund code is assigned.
AC-STBGS	Federal Advance Construction fund type code with the anticipated federal conversion code identified. For AC-STBGS, the anticipated conversion code is State STBG
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference
20435	1	OR99W: I-5 - McDonald St	7.47	13.74		CN	Preservation	Fix-It Region 1 SW ADA	\$26,585,468.00	\$33,585,468.00	\$7,000,000.00
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00	\$2,537,377.00
22431	1	OR141/OR217 curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00	\$1,925,639.00
22432	1	US30BY curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06	\$8,333,068.06
22603	1	I-405 Fremont bridge (Millamette River) West ramps	var	var		PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00	\$11,759,000.00
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00
22622	1	Portland Metro and surrounding area safety reserve	var	var		CN	Safety	Volunteer Safety	\$0.00	\$2,500,000.00	\$2,500,000.00
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00
							Fish Passage				
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00
							Modernization				

### Fund Codes

Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	ACPO	ADVANCE CONSTRUCT PR		100.00%	212,000.00	90.00%	190,800.00	10.00%	21,200.00	0.00%	0.00
	PE Totals				100.00%		190,800.00		21,200.00		0.00
CN	ACPO	ADVANCE CONSTRUCT PR		100.00%	788,000.00	90.00%	709,200.00	10.00%	78,800.00	0.00%	0.00
	CN Totals				100.00%		709,200.00		78,800.00		0.00
Grand Totals							1,000,000.00		900,000.00		100,000.00



**2021-2027 MTIP Formal Amendment Exhibit A to Resolution 22-52XX**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete. OTC approval occurred to add the project on July 14, 2022.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Update Entry  
ADD NEW PROJECT**  
Add new OTC approved project to  
the MTIP

Lead Agency:	ODOT		Project Type:	Highway	ODOT Key:	22613
Project Name:	Portland Metro and Surrounding Areas Safety Reserve	2	Fiscal Constraint Cat:	SM&O	MTIP ID:	NEW-TBD
			ODOT Type	Safety	Status:	0
			Performance Meas:	Safety	Comp Date:	12/31/2027
			Capacity Enhancing:	No	RTP ID:	12095
Project Status:			Conformity Exempt:	Yes	CMP:	Yes
0 = No activity.			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source:	ODOT	TSMO Cycle	N/A
			Funding Type:	AC	RFFA ID:	No
			State Highway Route	Region	RFFA Cycle:	N/A
			Mile Post Begin:	N/A	UPWP:	No
			Mile Post End:	N/A	UPWP Cycle:	N/A
			Length:	N/A	Past Amend:	0
Short Description:			Flex Transfer to FTA:	No	Council Appr:	Yes
Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.			FTA Conversion Code:	N/A	Council Date:	10/6/2022
			1st Year Program'd:	2023	OTC Approval:	Yes
			Years Active:	0	OTC Date	7/14/2022
			STIP Amend #: 21-24-2144		MTIP Amnd #: SP23-01-SEP	

**Detailed Description:** Across the Region 1 total four county area, establish a safety bucket reserve to support future urgent safety issues and project safety improvement needs are time sensitive and require immediate mitigation. Similar to Emergency Relieve funding bucket logic. (OTC approval: July 14, 2022)

**STIP Description:** Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.

Last Amendment of Modification: None. Initial MTIP programming

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
<b>Federal Funds</b>								
<b>AC-STBGS</b>	<b>ACP0</b>	<b>2023</b>					\$ 900,000	\$ 900,000
								\$ -
								\$ -
Note: Federal share is set at 90%							<b>Federal Totals:</b>	<b>\$ 900,000</b>
<b>State Funds</b>								
<b>State</b>	<b>Match</b>	<b>2023</b>					\$ 100,000	\$ 100,000
								\$ -
								\$ -
Note: Required minimum match is set at 10%							<b>State Total:</b>	<b>\$ 100,000</b>
<b>Local Funds</b>								
								\$ -
								\$ -
							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000
Total Project Cost Estimate (all phases):							\$	<b>1,000,000</b>
Year of Expenditure Cost Amount:							\$	<b>1,000,000</b>

#### Programming Summary Details

Why project is short programmed if applicable: N/A.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000
Phase Change Percent:	0%	100%	0%	0%	100%	100%
Revised Match Federal:					\$ 100,000	\$ 100,000
Revised Match Percent:					10.00%	10.00%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action? <b>Adds the new OTC approved ODOT safety improvement reserve bucket within Region 1 (Metro MPA boundary area to the MTIP. As specific eligible projects emerge and are approved, the funding in the bucket will be split off in support of the new safety project.</b>
4	MTIP Programming Submitted Supporting Documentation: <b>STIP Summary Report, STIP Impacts Worksheet, and OTC staff item.</b>
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? <b>Yes</b>
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? <b>Start = August 30, 2022 through September 28, 2022</b>
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? <b>Yes</b>
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? <b>Yes</b>
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? <b>No</b>
6	Added clarifying notes: <b>The project is part of the ODOT Annual Amendment submitted to OTC in July 2022.</b>

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? <b>Yes, Safety</b>
2A	Does the amendment include fiscal updates? <b>Yes, - initial fund programing of \$1 million for the project</b>
2B	What is the funding source for the project? <b>ODOT HB2017 Safety</b>
2C	Was the Proof-of Funding requirement satisfied and how? <b>July 2022 OTC item with project funding and approval request. Copy of staff item and allocation table provided</b>
2D	Was overall fiscal constraint demonstrated? <b>Yes</b>

#### RTP Consistency Check Areas

1A	RTP ID and Name: <b>ID# 12095 - Safety &amp; Operations Projects</b>
1B	RTP Project Description: <b>Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.</b>
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? <b>Yes, per 40 CFR 93.126, Table 2</b>
2B	What is the exception category per the regulation: <b>Safety - Projects that correct, improve, or eliminate a hazardous location or feature.</b>
3A	Is the project considered capacity enhancing? <b>No</b>
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? <b>Not applicable. The project is exempt from modeling requirements</b>
4	What RTP Goal does the project support? <b>Goal 5 - Safety and Security. Goal Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.</b>
5	Does the project appear to be subject to Performance Measurements analysis and what type? <b>Yes, safety</b>
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). <b>No.</b>

#### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: <b>No</b>
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? <b>N/A</b>
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? <b>N/A</b>

#### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? <b>Specific awarded projects will be.</b>
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? <b>No</b>
2B	What is the Metro modeling designation? <b>N/A</b>
3	Is the project designated as a Transportation Control Measure (TCM)? <b>No</b>
4	Is the project location identified on a Congestion Management Plan route? <b>No</b>

### Fund Type Codes References

ADVCON	A general Federal Advance Construction fund type placeholder used by ODOT when the expected federal fund code (e.g. HSIP, NHPP) is not available or designated yet. ODOT covers the initial expenditures allowing the phase obligation to occur. Later the federal conversion fund code is assigned.
AC-STBGS	Federal Advance Construction fund type code with the anticipated federal conversion code identified. For AC-STBGS, the anticipated conversion code is State STBG
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Key Number	Region	Project name	BMP	EMP	Bridge #
20435	1	OR99W: I-5 - McDonald St	7.47	13.74	
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136
22431	1	OR141/OR217 curb ramps	var	var	
22432	1	US30BY curb ramps	var	var	
22603	1	I-405 Fremont bridge (Willamette River) West ramps	var	var	
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2	
22613	1	Portland Metro and surrounding areas safety reserve	var	var	
18271	2	US101 at Asbury Creek	34.7	34.8	01796

Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total
CN	Preservation	Fix-It Region 1 SW ADA	\$26,585,468.00	\$33,585,468.00
CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00
PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00
PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06
PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00
PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00
OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00
PE, CN	Fish Passage	Fix-it SW Fish Pass	\$7,300,000.00	\$3,400,000.00

**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete. The federal funds for this project were awarded by the ODOT Bridge program.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Update Entry  
ADD NEW PROJECT**  
Add new ODOT Bridge Program  
awarded project to the MTIP

Lead Agency: ODOT			Project Type:	Local Rd	3	ODOT Key:	22645
Project Name:			Fiscal Constraint Cat:	Capital		MTIP ID:	NEW-TBD
Broadway Bridge Deck Replacement			ODOT Type	Bridge		Status:	4
			Performance Meas:	Bridge		Comp Date:	12/31/2024
Project Status:			Capacity Enhancing:	No		RTP ID:	11902
4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).			Conformity Exempt:	Yes		CMP:	Yes
			30 Day Notice Begin:	8/30/2022		TCM:	No
			30 Day Notice End:	9/28/2022		TSMO Award	No
			Funding Source	ODOT/Local		TSMO Cycle	N/A
			Funding Type:	Bridge/IIJA		RFFA ID:	N/A
			State Highway Route	N/A		RFFA Cycle:	N/A
			Mile Post Begin:	N/A		UPWP:	Yes
			Mile Post End:	N/A		UPWP Cycle:	SFY 2025
			Length:	N/A		Past Amend:	0
			Flex Transfer to FTA	No		Council Appr:	Yes
			FTA Conversion Code:	N/A		Council Date:	10/6/2022
			1st Year Program'd:	2023		OTC Approval:	No
			Years Active:	0		OTC Date	N/A
			STIP Amend #: 21-24-2342			MTIP Amnd #: SP23-01-SEP	

**Detailed Description:** In North Portland on the Broadway Bridge (Broadway St) over the Willamette River between North Interstate Ave and NW Naito Pkwy, replace the existing roadway deck, including streetcar rails on the bascule span, replace the existing differential gear assemblies, motor brakes, machinery brakes, power transmission shafting, plus replace all the existing mechanical and electrical components to provide a safe and durable riding surface for vehicles and light rail (ODOT Bridge/IIJA funding award)



**STIP Description:** Replace the existing roadway deck, including streetcar rails on the bascule span. Replace all the existing mechanical and electrical components to provide a safe and durable riding surface for vehicles and light rail. (Br # 06757)

Last Amendment of Modification: None. Initial MTIP programming

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
<b>Federal Funds</b>								
<b>State STBG - IIJA</b>	<b>Y233</b>	<b>2023</b>					<b>\$ 16,909,486</b>	<b>\$ 16,909,486</b>
								\$ -
Note: IIJA = Infrastructure Investment and Jobs Act							<b>Federal Totals:</b>	<b>\$ 16,909,486</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<b>Other</b>	<b>OTH0</b>	<b>2021</b>		<b>\$ 2,007,000</b>				<b>\$ 2,007,000</b>
<b>Local</b>	<b>Match</b>	<b>2023</b>					<b>\$ 1,935,366</b>	<b>\$ 1,935,366</b>
								\$ -
Note: PE phase completed by the agency with local funds							<b>Local Total</b>	<b>\$ 3,942,366</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	<b>\$ 2,007,000</b>	\$ -	\$ -	<b>\$ 18,844,852</b>	<b>\$ 20,851,852</b>
Total Project Cost Estimate (all phases):							<b>\$</b>	<b>20,851,852</b>
Year of Expenditure Cost Amount:							<b>\$</b>	<b>20,851,852</b>

#### Programming Summary Details

Why project is short programmed: N/A. The project is 100% programmed in all applicable phases

Phase Change Amount:	\$ -	\$ 2,007,000	\$ -	\$ -	\$ 18,844,852	\$ 20,851,852
Phase Change Percent:	0%	100%	0%	0%	100%	100%
Revised Match Federal:		\$ 2,007,000			\$ 1,935,366	\$ 3,942,366
Revised Match Percent:		100%			10.27%	18.91%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:		\$ 2,007,000				Federal Aid ID
Federal Funds Obligated:		\$ -				
Initial Obligation Date:		Not Available				Other Notes PE phase completed with local funds by the agency under IGA #73000-00003551
EA Number:		Not assigned				
EA Start Date:		N/A				
EA End Date:		N/A				
Known Expenditures:		N/A				

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Adds the new Multnomah County Broadway Bridge Deck Replacement project to the MTIP based on the new ODOT Bridge program awarded funding
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, Project Technical Scoping Sheet, Bridge Program Award Summary List, LABSC Minutes summary, project location map
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? No
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Bridge
2A	Does the amendment include fiscal updates? Yes, adding new funding to the MTIP
2B	What is the funding source for the project? ODOT Bridge Program
2C	Was the Proof-of Funding requirement satisfied and how? Yes, Bridge award list and committee minutes
2D	Was overall fiscal constraint demonstrated? Yes, award list + minutes

### RTP Consistency Check Areas

1A	RTP ID and Name: 1. ID# 11902 - Broadway Bridge Rehabilitation 2 2. ID# 12084 - Hawthorne, Burnside, and Broadway Control Systems Rehabilitation
1B	RTP Project Descriptions: - 11902: Electrical/structural upgrade to gates (BCIP12), fix pavement and update drainage, restripe (BCIP13); replace lighting (BCIP16). - 12084: Rehabilitation control systems on three bridges
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes. Exempt per Table 2, 40 CFR 93.126
2B	What is the exception category per the regulation: Safety - Widening narrow pavements or reconstructing bridges (no additional travel lanes).
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal 10, Fiscal Stewardship, Objective 10.1 - Infrastructure Condition – Plan, build and maintain regional transportation assets to maximize their useful life, minimize project construction and maintenance costs and eliminate maintenance backlogs.
5	Does the project appear to be subject to Performance Measurements analysis and what type? Yes, Safety plus Operations and Maintenance
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or has a cost greater than \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? N/A
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? N/A

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? Yes. The bridge location is identified as a "MAP21 -NHS Principal Arterial"
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes, Motor Vehicle Network
2B	What is the Metro modeling designation? Major Arterial in the Motor Vehicle Network
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? Yes

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Fund Type Codes References	
State STBGS - IIJA	Federal fund type code. Surface Transportation Block Grant funds appropriated to ODOT which are sourced from the Infrastructure Investment and Jobs Act
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds

## **LABSC Meeting Minutes 04/04/2022**

### **Big Bridge Funding**

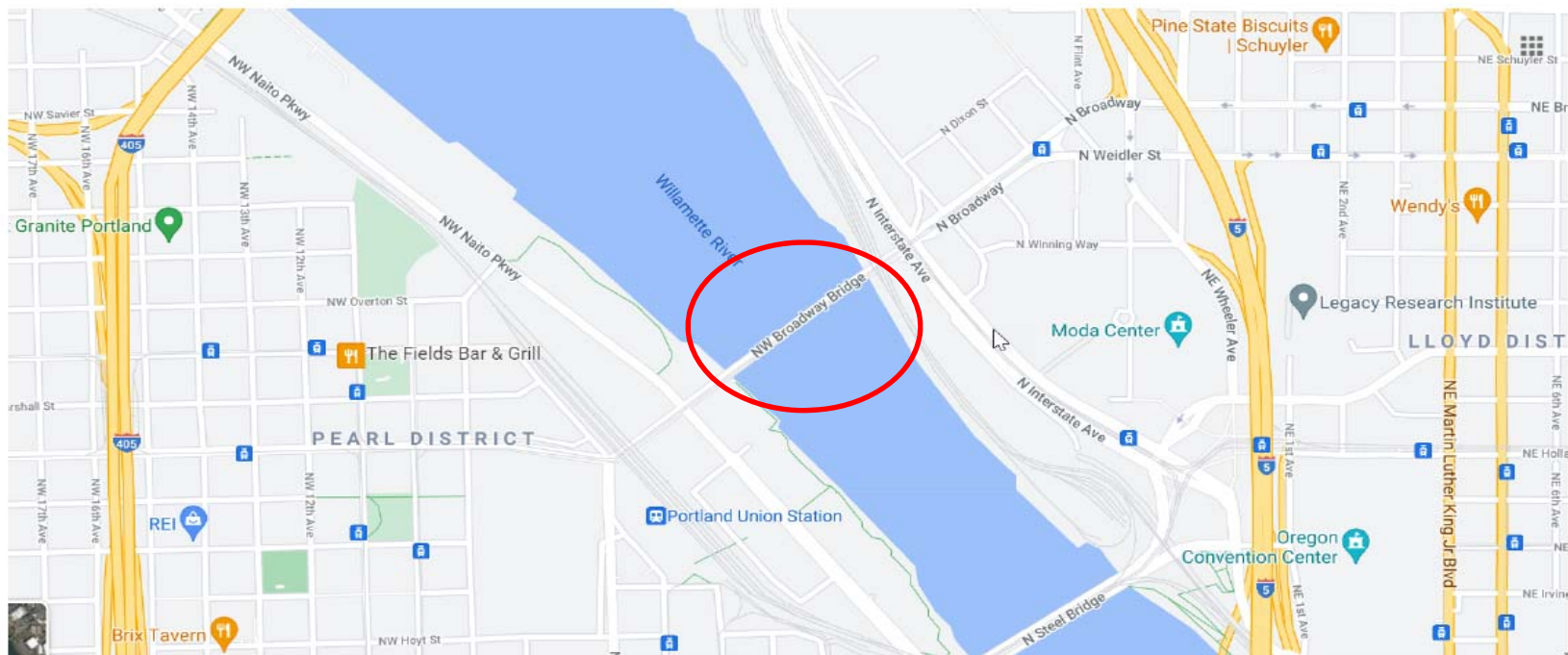
Holly and Michael shared the presentation and spreadsheet for the Big Bridge portion of the Local Bridge Program. Jon led the discussion. Each bridge was reviewed, and Jon shared that the priority for Multnomah County is the Broadway Bridge project that includes the replacement of the FRP deck and machinery for the lift span. The City of Klamath Falls bridge has funding (Key 22042, PE \$271K, CN \$2.5M) which is insufficient. Holly shared there is an estimate for this project from a consultant for \$7.8M, but that is a scoping estimate. Holly suggested that this project should be included in the scoping effort that will take place this summer. Jon suggested using a \$5M placeholder for this bridge project.

The LABSC voted 9-0 to fully fund the first 3 big bridges on the list (Marion County, City of Eugene, Multnomah County Broadway Bridge), and to have the City of Klamath Falls Bridge included in the scoping effort this summer, with a \$5M placeholder for funding.

102.0% Allocation														
Large Rehab			\$31,024,910 Allocated							(\$625,090) Remaining				
Bridge	Agency	Type	On-Off	Region	SRF	TBF	LDF	UBF	saf (sole	nfs (near	hut (high	tmt	tmt	
05789A	Marion County	Rehab	On - Big	2	34.00	0.00	0.00	23.01	1.00	1.00	1.00	3027	1.30	
40056	City of Eugene	Rehab	On - Big	2	10.40	0.00	0.00	24.80	1.00	1.00	1.41	46253	1.41	
a	06757	Multnomah County	Rehab	On - Big	1	7.80	0.00	0.00	0.00	1.00	1.00	1.00	6174	1.41
b	06757	Multnomah County	Rehab	On - Big	1	7.80	0.00	0.00	0.00	1.00	1.00	1.00	6174	1.41
	06757A	Multnomah County	Rehab	On - Big	1	0.00	0.00	0.00	0.00	1.00	1.00	1.00	790	1.20
	03849B	City of Klamath Falls	Rehab	On - Big	4	21.50	5.00	0.00	13.71	1.00	1.00	1.00	3836	1.30

Construction phase estimated cost -->

\$31,650,000 Selected				102.0% Allocation	
BNM	FCM	TRS	Report	Condition	Cost
1.30	1.41	52.40	Rpt.	Fair	\$6,013,000
1.41	1.40	34.84	Rpt.	Fair	\$1,837,000
1.41	1.40	7.72	Rpt.	Fair	\$18,800,000
1.41	1.40	7.72	Rpt.	Fair	\$15,785,000
1.20	1.40	0.00	Rpt.	Poor	\$20,390,000
1.30	1.40	36.59	Rpt.	Fair	\$5,000,000



**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
INCREASE FUNDS**  
Increase authorized UZA formula  
allocation

Lead Agency: SMART			Project Type:	Transit		ODOT Key:	20874
Project Name: SMART Bus Purchase/PM/Amenities and Technology 2021		4	Fiscal Constraint Cat:	Capital		MTIP ID:	70904
			ODOT Type	Transit		Status:	T22
			Performance Meas:	Transit		Comp Date:	12/31/2024
Project Status: T22 = Programming actions in progress or programmed in current MTIP			Capacity Enhancing:	No		RTP ID:	12097
			Conformity Exempt:	Yes		CMP:	No
			30 Day Notice Begin:	8/30/2022		TCM:	No
			30 Day Notice End:	9/28/2022		TSMO Award	No
			Funding Source	FTA		TSMO Cycle	N/A
Short Description: Maintenance and Bus Fleet Replacement and Software			Funding Type:	5307		RFFA ID:	N/A
			State Highway Route	N/A		RFFA Cycle:	N/A
			Mile Post Begin:	NA		UPWP:	No
			Mile Post End:	N/A		UPWP Cycle:	N/A
			Length:	N/A		Past Amend:	2
			Flex Transfer to FTA	No		Council Appr:	Yes
			FTA Conversion Code:	N/A		Council Date:	10/6/2022
			1st Year Program'd:	2021		OTC Approval:	No
			Years Active:	2	OTC Date	N/A	
			STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP		

**Detailed Description:** None

**STIP Description:** Maintenance, bus fleet replacement and software to ensure continued service.

Last Amendment of Modification: Administrative - December 2021 - AM22-07-DEC1 - Slip Other/Transit phase with \$298,758 of 5307 plus match from FFY 2022 to FFY 2023.

### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5307</del>	<del>FF92</del>	<del>2023</del>	-				<del>\$ 298,758</del>	\$ -
5307	FF92	2023					\$ 428,120	\$ 428,120
								\$ -
							<b>Federal Totals:</b>	<b>\$ 428,120</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 74,690</del>	\$ -
Local	Match	2023					\$ 107,030	\$ 107,030
								\$ -
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 107,030</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 373,448</del>	<del>\$ 373,448</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 535,150	\$ 535,150
Total Project Cost Estimate (all phases):							\$	\$ 535,150
Year of Expenditure Cost Amount:							\$	\$ 535,150

### Programming Summary Details

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 161,702	\$ 161,702
Phase Change Percent:	0%	0%	0%	0%	43.3%	43.3%
Revised Match Federal:					\$ 107,030	\$ 107,030
Revised Match Percent:					20.0%	20.0%



Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Increases the eligible 5307 funds for SMART based on a revised 5307 formula fund apportionment to the UZA which is then split among TriMet, SMART, and C-Tran
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and FTA Apportionment letter
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? No
6	Added clarifying notes: Revised authorized funding exceeded FTA's 30% threshold for administrative cost changes which triggered the formal amendment

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? Yes, changes to the authorized 5307 funds
2B	What is the funding source for the project? FTA - UZA apportionment
2C	Was the Proof-of Funding requirement satisfied and how? Yes, FTA UZA Apportionment update letter
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project appear to be subject to Performance Measurements analysis and what type? Yes, Transit
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5307	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current Programming Amounts			
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Federal	Local	Other	Total
FTA 5307 Funds								
20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 104,351	\$ -	\$ 521,755
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22195	SMART	SMART Bus Purchase/PM/Amenities and	2023	5307	\$ 550,000	\$ 137,500	\$ -	\$ 687,500

2021-2027 MTIP Formal Amendment - Exhibit A

September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Formal Amendment  
CANCEL PROJECT**  
From fund trade with TriMet, 22190 is  
being canceled

Lead Agency: SMART		Project Type: Transit		ODOT Key: 22190
Project Name: <del>SMART Senior and Disabled Program (2022)</del>	5	Fiscal Constraint Cat: Capital		MTIP ID: 71134
		ODOT Type Transit		Status: N/A
		Performance Meas: Transit		Comp Date: N/A
Project Status: Canceled		Capacity Enhancing: No		RTP ID: 12097
		Conformity Exempt: Yes		CMP: No
		30 Day Notice Begin: 8/30/2022		TCM: No
		30 Day Notice End: 9/28/2022		TSMO Award No
		Funding Source FTA		TSMO Cycle N/A
		Funding Type: 5310		RFFA ID: N/A
Short Description: Services and Facility Improvements for Elderly and Disabled Customers		State Highway Route N/A		RFFA Cycle: N/A
		Mile Post Begin: NA		UPWP: No
		Mile Post End: N/A		UPWP Cycle: N/A
		Length: N/A		Past Amend: 1
		Flex Transfer to FTA No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 10/6/2022
		1st Year Program'd: 2022		OTC Approval: No
		Years Active: 1		OTC Date N/A
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP

**Detailed Description:** None

**\* CANCELED PROJECT \***

**STIP Description:** Slip Other/Transit phase with \$41,000 of 5310 plus match from FFY 2022 to FFY 2023

Last Amendment of Modification: Administrative - December 2021 - AM22-07-DEC1 -

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
5310	F160	2023	-				<del>\$ 41,000</del>	\$ -
								\$ -
								\$ -
							<b>Federal Totals:</b>	<b>\$ -</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
Local	Match	2023	-				<del>\$ 10,250</del>	\$ -
								\$ -
								\$ -
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 51,250</del>	<del>\$ 51,250</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Project Cost Estimate (all phases):							\$	\$ -
Year of Expenditure Cost Amount:							\$	\$ -

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (51,250)	\$ (51,250)
Phase Change Percent:	0%	0%	0%	0%	-100.0%	-100.0%
Revised Match Federal:					\$ -	\$ -
Revised Match Percent:					0.0%	0.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Cancels the project based on a prior trade of funds to TriMet.
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and FTA Apportionment letter
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? No
6	Added clarifying notes: The decision was part of the revised apportionments that changed the funding levels for both SMART and TriMet.

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? No
2A	Does the amendment include fiscal updates? Yes, the 5310 funds are canceled from the MTP which results in a zero programming balance.
2B	What is the funding source for the project? FTA - UZA apportionment
2C	Was the Proof-of Funding requirement satisfied and how? Yes, SMART communication to Metro based on the updated Apportionment letter
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project appear to be subject to Performance Measurements analysis and what type? No.
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5310	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5310 funds support elderly and disabled persons transportation needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	<del>\$ 41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	<del>\$ 41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	<del>\$ 41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	<del>\$ 41,000</del>	\$ -	\$ -	\$ -	\$ -



**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
FUNDING & DESCRIPTION**  
Update project description and  
funding per EOY request

<b>Lead Agency:</b> SMART		Project Type:	Transit	<b>ODOT Key:</b>	<b>22191</b>
<b>Project Name:</b> <b>SMART Bus and Bus Facilities (Capital) 2022</b>	<b>6</b>	Fiscal Constraint Cat:	Capital	<b>MTIP ID:</b>	<b>71139</b>
		ODOT Type	TR-CAP	<b>Status:</b>	<b>T22</b>
		Performance Meas:	Transit	<b>Comp Date:</b>	<b>12/31/2025</b>
<b>Project Status:</b> T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing:	No	RTP ID:	12097
		Conformity Exempt:	Yes	CMP:	No
		30 Day Notice Begin:	8/30/2022	TCM:	No
		30 Day Notice End:	9/28/2022	TSMO Award	No
		Funding Source	FTA	TSMO Cycle	N/A
		Funding Type:	5339	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	N/A
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	10/6/2022
		1st Year Program'd:	2022	OTC Approval:	No
		Years Active:	1	OTC Date	N/A
<b>Short Description:</b> <del>Bus and Bus Facility Upgrades</del> <b>Change to --&gt; Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service</b>		STIP Amend #:	TBD	<b>MTIP Amnd #:</b>	<b>SP23-01-SEP</b>

**Detailed Description:** None, ADD ---> **SMART's FTA 5339 program supports the replacement, rehabilitation and purchase of buses and related equipment and to rehabilitate bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. The program also supports projects to replace, rehabilitate and purchase buses, vans, and related equipment, and to provide amenities such as as ADA lift and technology components and bus shelters and signs.**

**STIP Description:** Bus and bus facility upgrades to ensure continued service.

Last Amendment of Modification: Administrative - December 2021 - AM22-07-DEC1 - Slip Other/Transit phase with \$80,000 of 5339 plus match from FFY 2022 to FFY 2023

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5339</del>	<del>FF30</del>	<del>2023</del>	-				<del>\$ 80,000</del>	\$ -
5339	FF30	2024					\$ 48,763	\$ 48,763
								\$ -
Note: 5339 - assumed to be under "Buses and Bus Facilities Formula", section code 34 at 80% federal share							<b>Federal Totals:</b>	<b>\$ 48,763</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 10,250</del>	\$ -
Local	Match	2024					\$ 12,190	\$ 12,190
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 12,190</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 90,250</del>	<del>\$ 90,250</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 60,953	\$ 60,953
Total Project Cost Estimate (all phases):							\$	<b>60,953</b>
Year of Expenditure Cost Amount:							\$	<b>60,953</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (29,297)	\$ (29,297)
Phase Change Percent:	0%	0%	0%	0%	-32.5%	-32.5%
Revised Match Federal:					\$ 12,190	\$ 12,190
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment and trade with TriMet, SMART's 5339 program is reduced and slipped to FFY 2024.. The cost change exceeds the 30% administrative threshold which triggers the formal amendment.
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No
6	Added clarifying notes: 5339 funds will now be obligated and expend during FFY 2024

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? Yes, changes to the 5339 program apportionment
2B	What is the funding source for the project? FTA - UZA apportionment with changes authorized by SMART
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART
2D	Was overall fiscal constraint demonstrated? Yes.

**RTP Consistency Check Areas**

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project appear to be subject to Performance Measurements analysis and what type? No
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

**UPWP Consistency Check Areas**

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

**Other Review Areas**

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

**Fund Type Codes References**

5339	Federal transit funding from the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5339 supports buses and Bus Facilities needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current and Revised Programming Amounts				
20870	SMART	SMART Bus and Bus Facilities (Capital) 2020	2022 2023	5339	<del>\$ 76,800</del>	\$ 53,644	\$ 13,411	\$ -	\$ 67,055
20871	SMART	SMART Bus and Bus Facilities (Capital) 2021	2023	5339	<del>\$ 80,000</del>	\$ 50,800	\$ 12,700	\$ -	\$ 63,500
22191	SMART	SMART Bus and Bus Facilities (Capital) 2022	2023 2024	5339	<del>\$ 80,000</del>	\$ 48,763	\$ 12,190	\$ -	\$ 60,953
22194	SMART	SMART Bus and Bus Facilities (Capital) 2023	2023 2024	5339	<del>\$ 80,000</del>	\$ 50,000	\$ 12,500	\$ -	\$ 62,500
		SMART Bus and Bus Facilities							

June 8, 2022  
Linda Gehrke, Regional Administrator  
Federal Transit Administration, Region X  
915 Second Avenue, Suite 3142  
Seattle, WA 98174-1002

Re: Split Letter for FFY2022 Apportionment funding

Dear Ms. Gehrke:

This letter confirms agreement between TriMet, SMART, and C-TRAN on distribution of the Federal FFY2022 full year apportionment Formula funding, ending September 30, 2022, available to the Portland, OR-WA Urbanized Area.

Formula funds include Section 5307 – Urbanized Area Funds (and Section 5340 – Growing States), Section 5337 – High Intensity Motorbus (HIMB), Section 5337 – High Intensity Fixed Guideway (HIFG), State of Good Repair Funds, Section 5339 – Bus and Bus Facilities Funds and Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Funds. Distribution of the funds are shown in the table as follows:

Agency	Section 5307	Section 5337 HIFG	Section 5337 HIMB	Section 5339	Section 5310	Total FFY2022 Formula Funds
TriMet	51,930,404 *	38,199,581	24,177	3,048,873	1,961,709 *	95,164,744
SMART	576,323 *	0	0	48,763	0 *	625,086
C-TRAN	7,201,228	0	164,470	618,915	545,101	8,529,714
<b>Total</b>	<b>\$ 59,707,955</b>	<b>\$ 38,199,581</b>	<b>\$ 188,647</b>	<b>\$ 3,716,551</b>	<b>\$ 2,506,810</b>	<b>\$104,319,544</b>

\* TriMet and SMART have agreed to a redistribution of SMART's allocation of Section 5310 funds (\$26,714) for TriMet's Section 5307 funds. Amounts in the above table have been adjusted to reflect that agreement.

Each agency will spend and report funds in accordance with respective requirements. If you have any questions or need additional information, please contact Nancy Young-Oliver at TriMet (503-962-5875), Kelsey Lewis at SMART (503-682-4523) or Julie Syring at C-Tran (360-906-7340).

**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
INCREASE FUNDING**  
Increase 5307 approved funding for  
the project

Lead Agency: SMART		Project Type: Transit		ODOT Key: 22192	
Project Name: SMART Bus Purchase/PM/ Amenities and Technology 2022	7	Fiscal Constraint Cat: Capital		MTIP ID: 71144	
		ODOT Type Transit		Status: T22	
		Performance Meas: Transit		Comp Date: 12/31/2025	
		Capacity Enhancing: No		RTP ID: 12097	
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Conformity Exempt: Yes		CMP: No	
		30 Day Notice Begin: 8/30/2022		TCM: No	
		30 Day Notice End: 9/28/2022		TSMO Award No	
		Funding Source FTA		TSMO Cycle N/A	
Short Description: Maintenance and Bus Fleet Replacement and Software		Funding Type: 5307		RFFA ID: N/A	
		State Highway Route N/A		RFFA Cycle: N/A	
		Mile Post Begin: NA		UPWP: No	
		Mile Post End: N/A		UPWP Cycle: N/A	
		Length: N/A		Past Amend: 1	
		Flex Transfer to FTA No		Council Appr: Yes	
		FTA Conversion Code: N/A		Council Date: 10/6/2022	
		1st Year Program'd: 2022		OTC Approval: No	
		Years Active: 1		OTC Date N/A	
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

**Detailed Description:** None, ADD --> **For maintenance and bus fleet replacement and s software plus security camera upgrades on vehicle fleet and engineering and design services for SMART Fleet/Administration Phase II Expansion.**

**STIP Description:** Maintenance, bus fleet replacement and software to ensure continued service.

Last Amendment of Modification: Administrative - December 2021 - AM22-07-DEC1 - Slip Other/Transit phase with \$298,758 of 5307 plus match from FFY 2022 to FFY 2023

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5307</del>	<del>FF91</del>	<del>2023</del>	-				<del>\$ 298,758</del>	\$ -
5307	FF91	2023					\$ 576,323	\$ 576,323
								\$ -
							<b>Federal Totals:</b>	<b>\$ 576,323</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 74,690</del>	\$ -
Local	Match	2023					\$ 144,080	\$ 144,080
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 144,080</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 373,448</del>	<del>\$ 373,448</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 720,403	\$ 720,403
Total Project Cost Estimate (all phases):							\$	<b>720,403</b>
Year of Expenditure Cost Amount:							\$	<b>720,403</b>

#### Programming Summary Details

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 346,955	\$ 346,955
Phase Change Percent:	0%	0%	0%	0%	92.9%	92.9%
Revised Match Federal:					\$ 144,080	\$ 144,080
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment, SMART's 5307 program is increased in FFY 2023. The cost change exceeds the 30% administrative threshold which triggers the formal amendment.
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART and FTA Apportionment Update letter
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Are a significant amount of comments expected requiring a comments log summary for Metro Communications Staff? No
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? Yes, changes to the 5307 program apportionment
2B	What is the funding source for the project? FTA - UZA apportionment with changes authorized by SMART
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART
2D	Was overall fiscal constraint demonstrated? Yes.



### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5307	Federal transit funding from the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5307 supports various bus and bus-related activities.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current and Revised Programming Amounts				
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	<del>\$ 298,758</del>	\$ 428,120	\$107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	<del>\$ 298,758</del>	\$ 576,323	\$144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and	2023	5307	<del>\$ 298,758</del>	\$ 550,000	\$137,500	\$ -	\$ 687,500

June 8, 2022  
Linda Gehrke, Regional Administrator  
Federal Transit Administration, Region X  
915 Second Avenue, Suite 3142  
Seattle, WA 98174-1002

**Re: Split Letter for FFY2022 Apportionment funding**

Dear Ms. Gehrke:

This letter confirms agreement between TriMet, SMART, and C-TRAN on distribution of the Federal FFY2022 full year apportionment Formula funding, ending September 30, 2022, available to the Portland, OR-WA Urbanized Area.

Formula funds include Section 5307 – Urbanized Area Funds (and Section 5340 – Growing States), Section 5337 – High Intensity Motorbus (HIMB), Section 5337 – High Intensity Fixed Guideway (HIFG), State of Good Repair Funds, Section 5339 – Bus and Bus Facilities Funds and Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Funds. Distribution of the funds are shown in the table as follows:

Agency	Section 5307	Section 5337 HIFG	Section 5337 HIMB	Section 5339	Section 5310	Total FFY2022 Formula Funds
TriMet	51,930,404 *	38,199,581	24,177	3,048,873	1,961,709 *	95,164,744
SMART	576,323 *	0	0	48,763	0 *	625,086
C-TRAN	7,201,228	0	164,470	618,915	545,101	8,529,714
<b>Total</b>	<b>\$ 59,707,955</b>	<b>\$ 38,199,581</b>	<b>\$ 188,647</b>	<b>\$ 3,716,551</b>	<b>\$ 2,506,810</b>	<b>\$104,319,544</b>

\* TriMet and SMART have agreed to a redistribution of SMART's allocation of Section 5310 funds (\$26,714) for TriMet's Section 5307 funds. Amounts in the above table have been adjusted to reflect that agreement.

Each agency will spend and report funds in accordance with respective requirements. If you have any questions or need additional information, please contact Nancy Young-Oliver at TriMet (503-962-5875), Kelsey Lewis at SMART (503-682-4523) or Julie Syring at C-Tran (360-906-7340).

**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
DECREASE FUNDING**  
Decrease 5310 approved funding for  
the project

Lead Agency: SMART		Project Type: Transit		ODOT Key: 22193
Project Name: SMART Senior and Disabled Program (2023)	8	Fiscal Constraint Cat: SM&O		MTIP ID: 71135
		ODOT Type Transit		Status: T22
		Performance Meas: Transit		Comp Date: 12/31/2025
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing: No		RTP ID: 12097
		Conformity Exempt: Yes		CMP: No
		30 Day Notice Begin: 8/30/2022		TCM: No
		30 Day Notice End: 9/28/2022		TSMO Award No
		Funding Source FTA		TSMO Cycle N/A
Short Description: Existing: <del>Services and Facility Improvements for Elderly and Disabled Customers</del> Replace with ----> Provides overall ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.		Funding Type: 5310		RFFA ID: N/A
		State Highway Route N/A		RFFA Cycle: N/A
		Mile Post Begin: NA		UPWP: No
		Mile Post End: N/A		UPWP Cycle: N/A
		Length: N/A		Past Amend: 0
		Flex Transfer to FTA No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 10/6/2022
		1st Year Program'd: 2023		OTC Approval: No
		Years Active: 0		OTC Date N/A
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP

**Detailed Description:** ADD ---> **FTA formula Section program funds supporting ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville**

**STIP Description:** Services and facility improvements for elderly and disabled customers.

Last Amendment of Modification: None. First amendment to MTIP

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5310</del>	<del>F160</del>	<del>2023</del>	-				<del>\$ 41,000</del>	\$ -
5310	F160	2023					\$ 26,000	\$ 26,000
								\$ -
							<b>Federal Totals:</b>	<b>\$ 26,000</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 10,250</del>	\$ -
Local	Match	2023					\$ 6,500	\$ 6,500
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 6,500</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 51,250</del>	<del>\$ 51,250</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 32,500	\$ 32,500
Total Project Cost Estimate (all phases):							\$	<b>32,500</b>
Year of Expenditure Cost Amount:							\$	<b>32,500</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (18,750)	\$ (18,750)
Phase Change Percent:	0%	0%	0%	0%	-36.6%	-36.6%
Revised Match Federal:					\$ 6,500	\$ 6,500
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment and the fund trade with TriMet. MSART planned FFY 2023 5310 funding is being reduced. The net cost change is 36.8% which is above FTA's administrative threshold of 30%.
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART and FTA Apportionment Update letter
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Are a significant amount of comments expected requiring a comments log summary for Metro Communications Staff? No
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? Yes, changes to the 5310 program apportionment amounts.
2B	What is the funding source for the project? FTA - UZA apportionment and the fund trade with TriMet authorized by SMART
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project appear to be subject to Performance Measurements analysis and what type? No
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5310	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5310 funds support elderly and disabled persons transportation needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	<del>\$ 41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	<del>\$ 41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	<del>\$ 41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	<del>\$ 41,000</del>	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
5310 Totals:					\$ 246,000	\$ 106,464	\$ 26,616	\$ -	\$ 133,080

# 2021-2027 MTIP Formal Amendment - Exhibit A

## September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



### Metro 2021-27 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Formal Amendment  
SLIP & FUNDING**  
Update projected 5339 funding and  
slip to FFY 2024

<b>Lead Agency:</b> SMART		Project Type:	Transit	<b>ODOT Key:</b>	<b>22194</b>
<b>Project Name:</b> <b>SMART Bus and Bus Facilities (Capital) 2023</b>	<b>9</b>	Fiscal Constraint Cat:	Capital	<b>MTIP ID:</b>	<b>71140</b>
		ODOT Type	TR-CAP	<b>Status:</b>	<b>T22</b>
		Performance Meas:	Transit	<b>Comp Date:</b>	<b>12/31/2025</b>
<b>Project Status:</b> T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing:	No	RTP ID:	12097
		Conformity Exempt:	Yes	CMP:	No
		30 Day Notice Begin:	8/30/2022	TCM:	No
		30 Day Notice End:	9/28/2022	TSMO Award	No
		Funding Source	FTA	TSMO Cycle	N/A
		Funding Type:	5339	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	N/A
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	10/6/2022
		1st Year Program'd:	2022	OTC Approval:	No
		Years Active:	1	OTC Date	N/A
		STIP Amend #:	TBD	<b>MTIP Amnd #:</b>	<b>SP23-01-SEP</b>

**Detailed Description:** None, ADD ---> SMART's FTA 5339 program supports the replacement, rehabilitation and purchase of buses and related equipment and to rehabilitate bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. The program also supports projects to replace, rehabilitate and purchase buses, vans, and related equipment, and to provide amenities such as ADA lift and technology components and bus shelters and signs.



**STIP Description:** Bus and bus facility upgrades to ensure continued service.

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

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5339</del>	<del>FF30</del>	<del>2023</del>	-				<del>\$ 80,000</del>	\$ -
5339	FF30	2024					\$ 50,000	\$ 50,000
								\$ -
Note: 5339 - assumed to be under "Buses and Bus Facilities Formula", section code 34 at 80% federal share							<b>Federal Totals:</b>	<b>\$ 50,000</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 10,250</del>	\$ -
Local	Match	2024					\$ 12,190	\$ 12,190
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 12,190</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 90,250</del>	<del>\$ 90,250</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 62,190	\$ 62,190
Total Project Cost Estimate (all phases):							\$	<b>62,190</b>
Year of Expenditure Cost Amount:							\$	<b>62,190</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (28,060)	\$ (28,060)
Phase Change Percent:	0%	0%	0%	0%	-31.1%	-31.1%
Revised Match Federal:					\$ 12,190	\$ 12,190
Revised Match Percent:					19.6%	19.6%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment and trade with TriMet, SMART's 5339 program is reduced and slipped to FFY 2024. The cost change exceeds FTA administrative threshold of 30% for cost changes.					
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Are a significant amount of comments expected to be received requiring a comments log summary to Metro Communications Staff? No					
6	Added clarifying notes: 5339 funds will now be obligated and expend during FFY 2024					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Transit					
2A	Does the amendment include fiscal updates? Yes, changes to the 5339 program apportionment					
2B	What is the funding source for the project? FTA - UZA apportionment with a fund trade and final changes authorized by SMART					
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART					
2D	Was overall fiscal constraint demonstrated? Yes.					

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project appear to be subject to Performance Measurements analysis and what type? Yes, Transit
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5339	Federal transit funding from the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5339 supports buses and Bus Facilities needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

FTA 5339 Funds										
20869	SMART	SMART Bus and Bus Facilities (Capital) 2019	2022	5339	<del>\$ 70,000</del>	\$ 47,887	\$ 9,577	\$ -	\$ 57,464	
20870	SMART	SMART Bus and Bus Facilities (Capital) 2020	<del>2022</del> 2023	5339	<del>\$ 76,800</del>	\$ 53,644	\$ 13,411	\$ -	\$ 67,055	
20871	SMART	SMART Bus and Bus Facilities (Capital) 2021	2023	5339	<del>\$ 80,000</del>	\$ 50,800	\$ 12,700	\$ -	\$ 63,500	
22191	SMART	SMART Bus and Bus Facilities (Capital) 2022	<del>2023</del> 2024	5339	<del>\$ 80,000</del>	\$ 48,763	\$ 12,190	\$ -	\$ 60,953	
22194	SMART	SMART Bus and Bus Facilities (Capital) 2023	<del>2023</del> 2024	5339	<del>\$ 80,000</del>	\$ 50,000	\$ 12,500	\$ -	\$ 62,500	
22197	SMART	SMART Bus and Bus Facilities (Capital) 2024	2024	5339	<del>\$ 80,000</del>	\$ 50,000	\$ 12,500	\$ -	\$ 62,500	

# 2021-2027 MTIP Formal Amendment - Exhibit A

## September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



### Metro 2021-27 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Formal Amendment  
INCREASE FUNDING**  
Increase 5307 approved funding for  
the project

<b>Lead Agency:</b> SMART		Project Type:	Transit	<b>ODOT Key:</b>	<b>22195</b>
<b>Project Name:</b> SMART Bus Purchase/PM/ Amenities and Technology 2023	<b>10</b>	Fiscal Constraint Cat:	Capital	<b>MTIP ID:</b>	<b>71145</b>
		ODOT Type	Transit	<b>Status:</b>	<b>T22</b>
		Performance Meas:	Transit	<b>Comp Date:</b>	<b>12/31/2025</b>
<b>Project Status:</b> T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing:	No	RTP ID:	12097
		Conformity Exempt:	Yes	CMP:	No
		30 Day Notice Begin:	8/30/2022	TCM:	No
		30 Day Notice End:	9/28/2022	TSMO Award	No
		Funding Source	FTA	TSMO Cycle	N/A
		Funding Type:	5307	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	N/A
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
		Length:	N/A	Past Amend:	1
<b>Short Description:</b> Maintenance and Bus Fleet Replacement and Software		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	10/6/2022
		1st Year Program'd:	2023	OTC Approval:	No
		Years Active:	0	OTC Date	N/A
		STIP Amend #:	TBD	<b>MTIP Amnd #:</b>	<b>SP23-01-SEP</b>

**Detailed Description:** None, ADD --> **For maintenance and bus fleet replacement and s software plus security camera upgrades on vehicle fleet and engineering and design services for SMART Fleet/Administration Phase II Expansion.**

**STIP Description:** Maintenance, bus fleet replacement and software to ensure continued service.

Last Amendment of Modification: None

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5307</del>	<del>FF91</del>	<del>2023</del>	-				<del>\$ 298,758</del>	\$ -
5307	FF91	2023					\$ 550,000	\$ 550,000
								\$ -
							<b>Federal Totals:</b>	<b>\$ 550,000</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 74,690</del>	\$ -
Local	Match	2023					\$ 137,500	\$ 137,500
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 137,500</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 373,448</del>	<del>\$ 373,448</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 687,500	\$ 687,500
Total Project Cost Estimate (all phases):							\$	<b>687,500</b>
Year of Expenditure Cost Amount:							\$	<b>687,500</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 314,052	\$ 314,052
Phase Change Percent:	0%	0%	0%	0%	84.1%	84.1%
Revised Match Federal:					\$ 137,500	\$ 137,500
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment, SMART's 5307 program projection increases in FFY 2023. The cost change exceeds the 30% administrative threshold which triggers the formal amendment.					
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART and FTA Apportionment Update letter					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Are a significant amount of comments expected requiring a comments log summary for Metro Communications Staff? No					
6	Added clarifying notes:					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Transit					
2A	Does the amendment include fiscal updates? Yes, changes to the 5307 program apportionment					
2B	What is the funding source for the project? FTA - UZA apportionment with changes authorized by SMART					
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART					
2D	Was overall fiscal constraint demonstrated? Yes.					

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5307	Federal transit funding from the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5307 supports various bus and bus-related activities.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.



Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5307 Funds									
20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 417,404	\$ 104,351	\$ -	\$ 521,755
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	<del>\$ 298,758</del>	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	<del>\$ 298,758</del>	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500

**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
DECREASE FUNDING**  
Decrease 5310 approved funding for  
the project

Lead Agency: SMART		Project Type: Transit	ODOT Key: 22196	
Project Name: SMART Senior and Disabled Program (2024)	11	Fiscal Constraint Cat: SM&O	MTIP ID: 71136	
		ODOT Type: Transit	Status: T22	
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas: Transit	Comp Date: 12/31/2026	
		Capacity Enhancing: No	RTP ID: 12097	
		Conformity Exempt: Yes	CMP: No	
		30 Day Notice Begin: 8/30/2022	TCM: No	
		30 Day Notice End: 9/28/2022	TSMO Award: No	
Short Description: Existing: <del>Services and Facility Improvements for Elderly and Disabled Customers</del> Replace with ---> Provides overall ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.		Funding Source: FTA	TSMO Cycle: N/A	
		Funding Type: 5310	RFFA ID: N/A	
		State Highway Route: N/A	RFFA Cycle: N/A	
		Mile Post Begin: NA	UPWP: No	
		Mile Post End: N/A	UPWP Cycle: N/A	
		Length: N/A	Past Amend: 0	
		Flex Transfer to FTA: No	Council Appr: Yes	
		FTA Conversion Code: N/A	Council Date: 10/6/2022	
		1st Year Program'd: 2024	OTC Approval: No	
		Years Active: 0	OTC Date: N/A	
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP

**Detailed Description:** ADD ---> **FTA formula Section program funds supporting ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville**

**STIP Description:** Services and facility improvements for elderly and disabled customers.

Last Amendment of Modification: None. First amendment to MTIP

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5310</del>	<del>F160</del>	<del>2024</del>	-				<del>\$ 41,000</del>	\$ -
5310	F160	2024					\$ 26,000	\$ 26,000
								\$ -
							<b>Federal Totals:</b>	<b>\$ 26,000</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2024</del>	-				<del>\$ 10,250</del>	\$ -
Local	Match	2024					\$ 6,500	\$ 6,500
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 6,500</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 51,250</del>	<del>\$ 51,250</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 32,500	\$ 32,500
Total Project Cost Estimate (all phases):							\$	<b>32,500</b>
Year of Expenditure Cost Amount:							\$	<b>32,500</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (18,750)	\$ (18,750)
Phase Change Percent:	0%	0%	0%	0%	-36.6%	-36.6%
Revised Match Federal:					\$ 6,500	\$ 6,500
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment and the fund trade with TriMet. MSART planned FFY 2023 5310 funding is being reduced. The net cost change is 36.8% which is above FTA's administrative threshold of 30%.					
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART and FTA Apportionment Update letter					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Are a significant amount of comments expected requiring a comments log summary for Metro Communications Staff? No					
6	Added clarifying notes:					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Transit					
2A	Does the amendment include fiscal updates? Yes, changes to the 5310 program apportionment amounts.					
2B	What is the funding source for the project? FTA - UZA apportionment and the fund trade with TriMet authorized by SMART					
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART					
2D	Was overall fiscal constraint demonstrated? Yes.					

**RTP Consistency Check Areas**

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

**UPWP Consistency Check Areas**

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

**Other Review Areas**

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

**Fund Type Codes References**

5310	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5310 funds support elderly and disabled persons transportation needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	<del>\$ 41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	<del>\$ 41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	<del>\$ 41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	<del>\$ 41,000</del>	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
5310 Totals:					\$ 246,000	\$ 106,464	\$ 26,616	\$ -	\$ 133,080

## 2021-2027 MTIP Formal Amendment - Exhibit A

### September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



### Metro 2021-27 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Formal Amendment  
INCREASE FUNDING**  
Increase 5307 approved funding for  
the project

Lead Agency: SMART		Project Type:	Transit	ODOT Key:	22198
Project Name: SMART Bus Purchase/PM/ Amenities and Technology 2024	12	Fiscal Constraint Cat:	Capital	MTIP ID:	71146
		ODOT Type	Transit	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2026
		Capacity Enhancing:	No	RTP ID:	12097
		Conformity Exempt:	Yes	CMP:	No
		30 Day Notice Begin:	8/30/2022	TCM:	No
		30 Day Notice End:	9/28/2022	TSMO Award	No
		Funding Source	FTA	TSMO Cycle	N/A
		Funding Type:	5307	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	N/A
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
Short Description: Maintenance and Bus Fleet Replacement and Software		Length:	N/A	Past Amend:	0
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	10/6/2022
		1st Year Program'd:	2024	OTC Approval:	No
		Years Active:	0	OTC Date	N/A
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

**Detailed Description:** None, ADD --> For maintenance and bus fleet replacement and s software plus security camera upgrades on vehicle fleet and engineering and design services for SMART Fleet/Administration Phase II Expansion.

**STIP Description:** Maintenance, bus fleet replacement and software to ensure continued service.

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

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5307</del>	<del>FF91</del>	<del>2024</del>	-				<del>\$ 298,758</del>	\$ -
5307	FF91	2024					\$ 550,000	\$ 550,000
								\$ -
							<b>Federal Totals:</b>	<b>\$ 550,000</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2024</del>	-				<del>\$ 74,690</del>	\$ -
Local	Match	2024					\$ 137,500	\$ 137,500
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 137,500</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 373,448</del>	<del>\$ 373,448</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 687,500	\$ 687,500
Total Project Cost Estimate (all phases):							\$	<b>687,500</b>
Year of Expenditure Cost Amount:							\$	<b>687,500</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 314,052	\$ 314,052
Phase Change Percent:	0%	0%	0%	0%	84.1%	84.1%
Revised Match Federal:					\$ 137,500	\$ 137,500
Revised Match Percent:					20.0%	20.0%



Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: Based on the updated UZA apportionment, SMART's 5307 program projection increases in FFY 2023. The cost change exceeds the 30% administrative threshold which triggers the formal amendment.					
4	MTIP Programming Submitted Supporting Documentation: EOY Project Reviews and guidance from SMART and FTA Apportionment Update letter					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Are a significant amount of comments expected requiring a comments log summary for Metro Communications Staff? No					
6	Added clarifying notes:					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Transit					
2A	Does the amendment include fiscal updates? Yes, changes to the 5307 program apportionment					
2B	What is the funding source for the project? FTA - UZA apportionment with changes authorized by SMART					
2C	Was the Proof-of Funding requirement satisfied and how? Yes, confirmation of the funding changes by SMART					
2D	Was overall fiscal constraint demonstrated? Yes.					

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12097 - SMART Operations
1B	RTP Project Description: Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5307	Federal transit funding from the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5307 supports various bus and bus-related activities.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5307 Funds									
20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 417,404	\$ 104,351	\$ -	\$ 521,755
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	<del>\$ 298,758</del>	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	<del>\$ 298,758</del>	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500

# 2021-2027 MTIP Formal Amendment - Exhibit A

## September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



### Metro 2021-27 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Formal Amendment  
SCOPE & ADVANCE**  
Convert to prevent maint per annual  
fund swap & advance

<b>Lead Agency:</b> TriMet		<b>Project Type:</b> Transit	<b>ODOT Key:</b> 22164
<b>Project Name:</b> <del>Transit Oriented Development (TOD) program (FFY 2023)</del> <b>Preventive Maintenance Support (FFY 2023)</b>	<b>13</b>	<b>Fiscal Constraint Cat:</b> Capital	<b>MTIP ID:</b> 71103
		<b>ODOT Type:</b> Transit	<b>Status:</b> T22
		<b>Performance Meas:</b> Transit	<b>Comp Date:</b> 12/31/2024
		<b>Capacity Enhancing:</b> No	<b>RTP ID:</b> 11335
<b>Project Status:</b> T22 = Programming actions in progress or programmed in current MTIP		<b>Conformity Exempt:</b> Yes	<b>CMP:</b> No
		<b>30 Day Notice Begin:</b> 8/30/2022	<b>TCM:</b> No
		<b>30 Day Notice End:</b> 9/28/2022	<b>TSMO Award:</b> No
		<b>Funding Source:</b> Metro	<b>TSMO Cycle:</b> N/A
		<b>Funding Type:</b> STBG	<b>RFFA ID:</b> 50392
<b>Short Description:</b> <del>Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2023 allocation year)</del> <b>Metro (RFFA Step 1) STBG/Local exchange supporting TriMet's Bus and Rail Preventative Maintenance program needs for labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's 3 county service district</b>		<b>State Highway Route:</b> N/A	<b>RFFA Cycle:</b> 2022-24
		<b>Mile Post Begin:</b> NA	<b>UPWP:</b> No
		<b>Mile Post End:</b> N/A	<b>UPWP Cycle:</b> N/A
		<b>Length:</b> N/A	<b>Past Amend:</b> 1
		<b>Flex Transfer to FTA:</b> YES	<b>Council Appr:</b> Yes
		<b>FTA Conversion Code:</b> 5307	<b>Council Date:</b> 10/6/2022
		<b>1st Year Program'd:</b> 2023	<b>OTC Approval:</b> No
		<b>Years Active:</b> 0	<b>OTC Date:</b> N/A
		<b>STIP Amend #:</b> TBD	<b>MTIP Amnd #:</b> SP23-01-SEP

**Detailed Description:** ADD ---> The project is part of Metro and TriMet's annual UPWP STBG for Local funds exchange which provides Metro local funds to support TOD activities and TriMet federal STBG supporting their Preventative Maintenance program needs. TriMet commits the funds to their Preventative Maintenance program which provides labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's service district of Clackamas, Multnomah and Washington Counties (FFY 2023 allocation/SFY 2024 UPWP).

**STIP Description:** None - To be added

Last Amendment of Modification: Formal - June 2021 - JN21-11-JUN - Push out the UPWP planning project to FFY 2025 to avoid possible conflicts with the annual Obligation Targets program

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>STBG-U</del>	<del>Y230</del>	<del>2025</del>	-				<del>\$ 3,600,373</del>	\$ -
<b>STBG-U</b>	<b>Y230</b>	<b>2023</b>					<b>\$ 3,600,373</b>	<b>\$ 3,600,373</b>
								\$ -
Note: Annual RFFA Step 1 Metro-TriMet TOD fund swap							<b>Federal Totals:</b>	<b>\$ 3,600,373</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2025</del>	-				<del>\$ 412,079</del>	\$ -
<b>Local</b>	<b>Match</b>	<b>2023</b>					<b>\$ 412,079</b>	<b>\$ 412,079</b>
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ 412,079</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 4,012,452	\$ 4,012,452
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 4,012,452	\$ 4,012,452
Total Project Cost Estimate (all phases):								\$ 4,012,452
Year of Expenditure Cost Amount:								\$ 4,012,452

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Change Percent:	0%	0%	0%	0%	0.0%	0.0%
Revised Match Federal:					\$ 107,030	\$ 107,030
Revised Match Percent:					10.3%	2.7%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	<p>This amendment to the MTIP completes what action:</p> <p>The formal amendment advances the project from FFY 2025 to FFY 2023 as TriMet is ready to move forward with their TrAMS grant. The project scope is updated to reflect the fund exchange TriMet will use the STBG in support of their annual Preventative Maintenance program. Metro receives local funds from TriMet in exchange for the STBG which are used to complete TOD activities. The existing TOD project is a placeholder for TriMet to determine the specific use for the funds. This amendment now updates the scope to reflect the expected use of the STBG by TriMet. The STBG will flex transferred to FTA and has an expected conversion code of 5307. As part of the amendment, ODOT will assign a new Key number to the project as well.</p>					
4	MTIP Programming Submitted Supporting Documentation: RFFA Step 1 Allocation Table Summary, confirmation from TriMet of the planned use of the funds to support their Preventative Maintenance program.					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No					
6	Added clarifying notes: TriMet's TrAMS application is expected to move forward by December 2022.					

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? No. There are no changes to the STBG funding
2B	What is the funding source for the project? RFFA Step 1 Allocation Summary table
2C	Was the Proof-of Funding requirement satisfied and how? Yes, RFFA Step 1 Allocation Summary table
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 11335 - Operating Capital: Equipment and Facilities Phase 1
1B	RTP Project Description: Additional maintenance costs to support existing bus system including ongoing bus purchases as needed to maintain and update fleet.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

UPWP Consistency Check Areas	
1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

	Federal Fiscal Year							
	2016	2017	2018	2019	2020	2021	2022	2023
HCT Bond	\$16,000,000	\$16,000,000	\$16,000,000	\$20,380,000	\$21,390,000	\$21,390,000	\$21,830,000	\$21,840,000
TOD	\$3,021,148	\$3,063,139	\$3,105,713	\$3,198,884	\$3,294,851	\$3,393,696	\$3,495,507	\$3,600,373
TSMO Grant bucket	\$1,523,092	\$1,546,545	\$1,570,363	\$1,585,262	\$1,534,801	\$1,478,467	\$1,667,159	\$1,717,173
TSMO Administration (Metro)				\$113,045	\$178,852	\$183,211	\$188,707	\$194,369
RTO	\$2,302,760	\$2,336,500	\$2,370,740	\$2,522,695	\$2,598,451	\$2,676,405	\$2,756,697	\$2,839,398
RTO - Safe Routes to Schools				\$485,000	\$500,000	\$515,000	\$530,450	\$546,364
Corridor & System Planning	\$507,427	\$514,963	\$522,610	\$538,288	\$554,437	\$571,070	\$588,202	\$605,848
Freight & Eco Devo System Planning				\$67,900	\$70,000	\$72,100	\$74,263	\$76,491
MPO Planning	\$1,173,042	\$1,208,233	\$1,244,480	\$1,281,815	\$1,320,269	\$1,359,877	\$1,400,673	\$1,442,694
Total Bond Commitment (annual)	\$16,000,000	\$16,000,000	\$16,000,000	\$20,380,000	\$21,390,000	\$21,390,000	\$21,830,000	\$21,840,000
Total Step 1 (annual)	\$8,527,469	\$8,669,380	\$8,813,906	\$9,792,889	\$10,051,661	\$10,249,826	\$10,701,659	\$11,022,709
Bond Commitment & Step 1 (annual)						\$31,639,826	\$32,531,659	\$32,862,709



**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
ADD FUNDING**  
Increase 5339 funds per updated  
UZA apportionment

Lead Agency:	TriMet		Project Type:	Transit	ODOT Key:	22181
Project Name:		14	Fiscal Constraint Cat:	Maint	MTIP ID:	71210
TriMet Bus and Rail Preventive Maintenance (2023)			ODOT Type	TR-Cap	Status:	T22
			Performance Meas:	Transit	Comp Date:	12/31/2025
			Capacity Enhancing:	No	RTP ID:	11335
Project Status:			Conformity Exempt:	Yes	CMP:	No
T22 = Programming actions in progress or programmed in current MTIP			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	FTA	TSMO Cycle	N/A
			Funding Type:	5337	RFFA ID:	N/A
			State Highway Route	N/A	RFFA Cycle:	N/A
			Mile Post Begin:	NA	UPWP:	No
			Mile Post End:	N/A	UPWP Cycle:	N/A
			Length:	N/A	Past Amend:	0
Short Description:			Flex Transfer to FTA	No	Council Appr:	Yes
Capital Maintenance For Bus And Rail to ensure continued service			FTA Conversion Code:	N/A	Council Date:	10/6/2022
			1st Year Program'd:	2023	OTC Approval:	No
			Years Active:	0	OTC Date	N/A
			STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

**Detailed Description:** None. ADD ---> Provides various fleet maintenance and servicing support such as light rail vehicle (LRV) maintenance and repairs including inspection pits, wheel-truing bay, truck repair, and long-term and short-term repair stations and inspections, light repairs, component exchanges for both high and low-floor cars, HVAC unit repairs, and rebuild for the entire fleet for continue service

**STIP Description:** Capital maintenance for bus and rail to ensure continued service

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

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5337</del>	<del>FF91</del>	<del>2023</del>	-				<del>\$ 26,356,662</del>	\$ -
5337	FF91	2023					\$ 39,370,471	\$ 39,370,471
								\$ -
Note: 5337 is set at 80% federal percent							<b>Federal Totals:</b>	<b>\$ 39,370,471</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 6,589,166</del>	\$ -
Local	Match	2023					\$ 9,842,618	\$ 9,842,618
								\$ -
							<b>Local Total</b>	<b>\$ 9,842,618</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 32,945,828</del>	<del>\$ 32,945,828</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 49,213,089	\$ 49,213,089
Total Project Cost Estimate (all phases):							\$	<b>49,213,089</b>
Year of Expenditure Cost Amount:							\$	<b>49,213,089</b>

**Programming Summary Details**

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 16,267,261	\$ 16,267,261
Phase Change Percent:	0%	0%	0%	0%	49.4%	49.4%
Revised Match Federal:					\$ 9,842,618	\$ 9,842,618
Revised Match Percent:					20.0%	20.0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The projected FFY 2023 5339 formula funds are increased based on earlier FFY 2022 FTA formula fund apportionment to the UZA. The increase equals 49% which is above the FTA 30% threshold for administrative cost changes.
4	MTIP Programming Submitted Supporting Documentation: EOY Project Review updates and FTA Apportionment letter
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No
6	Added clarifying notes: Revised authorized funding exceeded FTA's 30% threshold for administrative cost changes which triggered the formal amendment

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Transit
2A	Does the amendment include fiscal updates? Yes, changes to the authorized 5337 funds
2B	What is the funding source for the project? FTA - UZA apportionment letter and revised FFY 2023 estimates
2C	Was the Proof-of Funding requirement satisfied and how? Yes, FTA UZA Apportionment update letter and EOY Updates from TriMet
2D	Was overall fiscal constraint demonstrated? Yes.

**RTP Consistency Check Areas**

1A	RTP ID and Name: ID# 11335 - Operating Capital: Equipment and Facilities Phase 1
1B	RTP Project Description: Additional maintenance costs to support existing bus system including ongoing bus purchases as needed to maintain and update fleet.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

**UPWP Consistency Check Areas**

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

**Other Review Areas**

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

**Fund Type Codes References**

5337	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5337 funds support projects that maintain, rehabilitate, and replace capital assets, as well as projects that implement transit asset management plans.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.

	Programming History		Programming Changes				
Capital Maintenance For Bus and Rail to ensure continued service.	2023	5337 HIFG & HIMB	<del>\$ 26,356,662</del>	\$ 39,370,471	\$ 9,842,618	\$ -	\$ 49,213,088

**2021-2027 MTIP Formal Amendment - Exhibit A**

**September 2022 Formal Amendment for FFY 2023 - Amendment Number SP23-01-SEP**

Summary Reason for Change: The project includes federal funds and federal approval steps which requires MTIP and STIP programming in order to complete or modify to ensure the approval step can occur.



**Metro  
2021-27 Metropolitan Transportation Improvement Program (MTIP)  
PROJECT AMENDMENT DETAIL WORKSHEET**

**MTIP Formal Amendment  
ADD FUNDING**  
Increase 5310 funds per updated  
UZA apportionment

<b>Lead Agency:</b>	<b>TriMet</b>		<b>Project Type:</b>	Transit	<b>ODOT Key:</b>	<b>22184</b>
<b>Project Name:</b>		<b>15</b>	<b>Fiscal Constraint Cat:</b>	Other	<b>MTIP ID:</b>	<b>71213</b>
<b>Enhanced Seniors Mobility/Individuals w/Disabilities (2023)</b>			<b>ODOT Type</b>	Transit	<b>Status:</b>	<b>T22</b>
<b>5310</b>			<b>Performance Meas:</b>	Transit	<b>Comp Date:</b>	<b>12/31/2025</b>
<b>Project Status:</b>			<b>Capacity Enhancing:</b>	No	<b>RTP ID:</b>	11334
T22 = Programming actions in progress or programmed in current MTIP			<b>Conformity Exempt:</b>	Yes	<b>CMP:</b>	No
			<b>30 Day Notice Begin:</b>	8/30/2022	<b>TCM:</b>	No
			<b>30 Day Notice End:</b>	9/28/2022	<b>TSMO Award</b>	No
			<b>Funding Source</b>	FTA	<b>TSMO Cycle</b>	N/A
			<b>Funding Type:</b>	5310	<b>RFFA ID:</b>	N/A
			<b>State Highway Route</b>	N/A	<b>RFFA Cycle:</b>	N/A
			<b>Mile Post Begin:</b>	NA	<b>UPWP:</b>	No
			<b>Mile Post End:</b>	N/A	<b>UPWP Cycle:</b>	N/A
			<b>Length:</b>	N/A	<b>Past Amend:</b>	1
			<b>Flex Transfer to FTA</b>	No	<b>Council Appr:</b>	Yes
			<b>FTA Conversion Code:</b>	N/A	<b>Council Date:</b>	10/6/2022
			<b>1st Year Program'd:</b>	2023	<b>OTC Approval:</b>	No
			<b>Years Active:</b>	0	<b>OTC Date</b>	N/A
			<b>STIP Amend #:</b>	TBD	<b>MTIP Amnd #:</b>	<b>SP23-01-SEP</b>

**Detailed Description:** Section 5310 funding supports elderly and persons with disability services (capital and operating expenses). Funds mobility management activities, purchase of services, operating, and preventive maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area. Funds will be passed through to Ride Connection and used for TriMet's LIFT Paratransit services.

**STIP Description:** Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland urbanized area.

Last Amendment of Modification: Administrative -February 2022 - AM22-11-FEB1 - DESCRIPTION UPDATE: The administrative modification updates the project name and short description to better align with the Program of Projects (POP) and project description to be used in the TrAMS grant

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
<b>Federal Funds</b>								
<del>5310</del>	<del>F160</del>	<del>2023</del>	-				<del>\$ 1,405,437</del>	\$ -
<b>5310</b>	<b>F160</b>	<b>2023</b>					<b>\$ 2,020,560</b>	<b>\$ 2,020,560</b>
								\$ -
Note: 5310 is set at 80% federal percent							<b>Federal Totals:</b>	<b>\$ 2,020,560</b>

#### State Funds

								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>

#### Local Funds

<del>Local</del>	<del>Match</del>	<del>2023</del>	-				<del>\$ 351,359</del>	\$ -
<b>Local</b>	<b>Match</b>	<b>2023</b>					<b>\$ 505,140</b>	<b>\$ 505,140</b>
<b>Other</b>	<b>OTH0</b>	<b>2023</b>					<b>\$ 151,463</b>	<b>\$ 151,463</b>
Note: Local = minimum 20% match amount required to show against the federal 5310							<b>Local Total</b>	<b>\$ 656,603</b>

Phase Totals Before Amend:	\$ -	\$ -	\$ -	\$ -	\$ -	<del>\$ 1,756,796</del>	<del>\$ 1,756,796</del>
Phase Totals After Amend:	\$ -	\$ -	\$ -	\$ -	\$ -	<b>\$ 2,677,163</b>	<b>\$ 2,677,163</b>
Total Project Cost Estimate (all phases):							<b>\$ 2,677,163</b>
Year of Expenditure Cost Amount:							<b>\$ 2,677,163</b>

#### Programming Summary Details

Why project is short programmed: N/A. The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 920,367	\$ 920,367
Phase Change Percent:	0%	0%	0%	0%	52.4%	52.4%
Revised Match Federal:					\$ 656,603	\$ 656,603
Revised Match Percent:					24.5%	24.5%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: The projected FFY 2023 5310 formula funds are increased based on earlier FFY 2022 FTA formula fund apportionment to the UZA and a subsequent fund exchange with SMART. The increase equals 52% which is above the FTA 30% threshold for administrative cost changes.					
4	MTIP Programming Submitted Supporting Documentation: EOY Project Review updates and FTA Apportionment letter					
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? August 30, 2022 to September 28, 2022					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No					
6	Added clarifying notes: Revised authorized funding exceeded FTA's 30% threshold for administrative cost changes which triggered the formal amendment					
Fiscal Constraint Consistency Check Areas						
1	Will Performance Measurements Apply? Yes, Transit					
2A	Does the amendment include fiscal updates? Yes, changes to the authorized 5310 funds					
2B	What is the funding source for the project? FTA - UZA apportionment letter and revised FFY 2023 estimates					
2C	Was the Proof-of Funding requirement satisfied and how? Yes, FTA UZA Apportionment update letter and EOY Updates from TriMet					
2D	Was overall fiscal constraint demonstrated? Yes.					



### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 11334 - Operating Capital: Safety & Security Phase 1
1B	RTP Project Description: Safety enhancements, CCTV, Transit Police.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Mass Transit - Operating assistance to transit agencies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? N/A. The project is not capacity enhancing
4	What RTP Goal does the project support? Goal #3 - Transportation Choices - Objective 3.3 Access to Transit – Increase household and job access to current and planned frequent transit service.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing or costs in excess of \$100 million dollars

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, not specifically to the Transit network
2B	What is the Metro modeling designation? Not Applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

5310	Federal transit funding the federal Transit Administration which is appropriated to eligible Urban Zones (UZA) and further allocated directly to the authorized direct recipient for use of the funds. 5310 funds support elderly and disabled persons transportation needs.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds. Fr FTA Section 5307 funds, the minimum match requirement is usually 20%.
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds

FTA 5310 Funds										
22183	71212	Enhanced Seniors Mobility/ Individuals w/Disabilities (2022) 5310	Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	2022 2023	5310	<del>\$ 1,343,821</del>	\$ 1,961,709	\$ 490,427	\$ 151,464	\$ 2,603,600
22184	71213	Enhanced Seniors Mobility/ Individuals w/Disabilities (2023) 5310	Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	2023	5310	<del>\$ 1,405,437</del>	\$ 2,020,560	\$ 505,140	\$ 151,463	\$ 2,677,163

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: August 24, 2022  
To: TPAC and Interested Parties  
From: Ken Lobeck, Funding Programs Lead  
Subject: September FFY 2023 MTIP Formal Amendment & Resolution 21-52XX Approval Request

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## **FORMAL AMENDMENT STAFF REPORT**

### **Amendment Purpose Statement**

**FOR THE PURPOSE OF ADDING NEW OR AMENDING EXISTING PROJECTS IN THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO COMPLETE REQUIRED PHASE SLIPS AND MAKE REQUIRED CORRECTIONS TO MEET FALL OBLIGATIONS OR FEDERAL APPROVAL STEPS (SP23-01-SEP)**

### **BACKGROUND**

#### **What This Is:**

The September FFY 2023 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment regular bundle represents the first formal MTIP amendment for FFY 2023. It primarily is a “corrective” and “clean-up” amendment completing required changes or adding projects that will obligate early during FFY 2023, or were above the amendment threshold for administrative modifications and require a formal/full amendment. The amendment bundle contains phase slips, funding changes, new projects, name/description updates and is being processed under MTIP Amendment SP23-01-SEP. The changes/additions need to occur early in FFY 2023 to position them properly for their planned fall phase obligation or next federal approval step which the MTIP and STIP is part of the approval steps. The bundle contains a total of 15 project amendments.

#### **What is the requested action?**

**Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 22-52XX consisting of additions and changes or new projects which are required to be added to the MTIP enabling federal reviews and fund obligations to then occur in early Fall of 2022.**

A summary of the projects and amendment actions within the bundle are shown on the next pages.

September FFY 2023 Formal Transition Amendment Bundle Contents Amendment Type: Formal/Full Amendment #: SP23-01-SEP Total Number of Projects: 15				
Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # <b>22609</b> MTIP ID TBD New Project	ODOT	<b>OR8: East Lane (Cornelius)</b> (New Project)	Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross OR 8 in a highly trafficked crossing with high use of public transportation.	<b><u>ADD NEW PROJECT:</u></b> The Formal Amendment adds the OTC approved safety project to the MTIP
(#2) ODOT Key # <b>22613</b> MTIP ID TBD New Project	ODOT	<b>Portland Metro and Surrounding Areas Safety Reserve</b>	Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah, and Washington counties.	<b><u>ADD NEW PROJECT:</u></b> The Formal Amendment adds the OTC approved safety project to the MTIP
(#3) ODOT Key # <b>22645</b> MTIP ID TBD New Project	Multnomah County	<b>Broadway Bridge Deck Replacement</b>	Replace the existing roadway deck, including streetcar rails on the bascule span. Replace all the existing mechanical and electrical components to provide a safe and durable riding surface for vehicles and light rail. (Br # 06757)	<b><u>ADD NEW PROJECT:</u></b> The Formal Amendment adds the new project with ODOT Bridge program awarded funding.
(#4) ODOT Key # <b>20874</b> MTIP ID: 70904	SMART	SMART Bus Purchase/PM/Amenities and Technology 2021	Maintenance and Bus Fleet Replacement and Software	<b><u>ADD FUNDS:</u></b> The amendment increases the authorized 5307 funding for the project.

(#5) ODOT Key # <b>22190</b> MTIP ID: 71134	SMART	SMART Senior and Disabled Program (2022)	Services and Facility Improvements for Elderly and Disabled Customers	<b><u>CANCEL PROJECT:</u></b> Key 22190 is canceled as SMART has traded funds with TriMet. Key 22190 is no longer a project.
(#6) ODOT Key # <b>22191</b> MTIP ID: 71139	SMART	SMART Bus and Bus Facilities (Capital) 2022	<del>Bus and Bus Facility Upgrades</del> <b>Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service</b>	<b><u>FUNDING AND DESCRIPTION:</u></b> Decrease authorize FTA section 5339 funds and expand description per FTA guidance
(#7) ODOT Key # <b>22192</b> MTIP ID: 71144	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	SMART Bus Purchase/PM/ Amenities and Technology 2022	<b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project per the updated UZA Apportionment letter
(#8) ODOT Key # <b>22193</b> MTIP ID: 71135	SMART	SMART Senior and Disabled Program (2023)	<del>Services and Facility Improvements for Elderly and Disabled Customers</del> <b>Provides overall ADA &amp; para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.</b>	<b><u>DECREASE FUNDING:</u></b> Based on the updated UZA apportionment and the fund trade with TriMet, the FFY 2023 5310 funding for this project is being decreased.

(#9) ODOT Key # <b>22194</b> MTIP ID: 71140	SMART	SMART Bus and Bus Facilities (Capital) 2023	<del>Bus and Bus Facility Upgrades</del> Supports replacement/ rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service	<b><u>SLIP &amp; FUNDING:</u></b> Decrease projected authorized 5339 funds and slip project to FFY 2024
(#10) ODOT Key # <b>22195</b> MTIP ID: 71145	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2023	Maintenance and Bus Fleet Replacement and Software	<b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project
(#11) ODOT Key # <b>22196</b> MTIP ID: 71136	SMART	SMART Senior and Disabled Program (2024)	<del>Services and Facility Improvements for Elderly and Disabled Customers</del> Provides overall ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.	<b><u>DECREASE FUNDING:</u></b> Based on the updated UZA apportionment and the fund trade with TriMet, the FFY 2023 5310 funding for this project is being decreased.
(#12) ODOT Key # <b>22198</b> MTIP ID: 71146	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2024	Maintenance and Bus Fleet Replacement and Software	<b><u>INCREASE FUNDING:</u></b> Add approved FTA Section 5307 funds to the project
(#13) ODOT Key # <b>22164</b> MTIP ID: 71103	TriMet	<del>Transit Oriented Development (TOD) program (FFY 2023)</del> Preventive Maintenance Support (FFY 2023)	<del>Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2023 allocation year)</del> Metro (RFFA Step 1) STBG/Local exchange supporting TriMet's Bus and Rail Preventative Maintenance program	<b><u>SCOPE ADJUSTMENT &amp; ADVANCE:</u></b> The formal amendment advances the project from FFY 2025 to FFY 2023 and updates the project scope based on TriMet's planned use for the STBG funds

			<b>needs for labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's 3 county service district</b>	
(#14) ODOT Key # <b>22181</b> MTIP ID: 71210	TriMet	TriMet Bus and Rail Preventive Maintenance (2023)	Capital Maintenance For Bus And Rail <b>to ensure continued service</b>	<b><u>ADD FUNDING:</u></b> Increase authorized 5337 funds based on revised FFY 2023 FTA UZA estimates
(#15) ODOT Key # <b>22184</b> MTIP ID: 71213	TriMet	Enhanced Seniors Mobility/ Individuals w/Disabilities (2023) 5310	Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	<b><u>ADD FUNDING:</u></b> Increase authorized 5310 funds based on revised FFY 2023 FTA UZA estimates

#### AMENDMENT BUNDLE SUMMARY:

The September FFY 2023 Formal MTIP Amendment bundle involves adding three new projects to the MTIP, canceling one project, and completing required funding, description, and/or other technical corrections. A total of 15 projects are included on the September, SP23-01-SEP1 amendment bundle. All projects in the bundle completed a 30-day public notification/opportunity to comment period consistent with Metro's Public Participation Plan. The public comment period opened on August 30, 2022 and closed on September 28, 2022.

The included transit projects were reviewed in early summer 2022 with various adjustments being made through administrative modifications. The projects in this bundle reflect required changes that fell outside the amendment matrix for administrative changes. Generally, the project changes triggered a formal amendment were due to the following reasons:

- The change resulted in adding the project to the MTIP.
- The action canceled the project from the MTIP.
- The change updated project costs which:
  - Were above the 30% cost change threshold for transit projects.
  - Were above the 30% cost change threshold for roadway/capital improvement projects with a total project cost between \$1 and 5 million dollars.
  - Were above the 20% cost change threshold for roadway/capital improvement projects with a total project cost above \$5 million.

Most of the required project changes were identified during this past summer and where changes could occur administratively, Metro and ODOT completed the administrative modifications. However, the revised Federal Transit Administration (FTA) Urbanized Zone Area (UZA) apportionment for FFY 2022 was far more significant than anticipated which triggered the formal

amendment for numerous transit projects. The changes for these project are now occurring through this formal amendment.

A more detailed overview of each project amendment in the bundle begins below.

Project #1	OR8: East Lane (Cornelius) – New project
<p><b><u>Project Description:</u></b> Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross OR 8 in a highly trafficked crossing with high use of public transportation.</p>	
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"><li>• Lead Agency: ODOT</li><li>• ODOT Key Number: <b>22609</b></li><li>• MTIP ID#: New TBD – not yet assigned</li><li>• RTP ID: 12095</li><li>• Proof-of Funding/Fiscal Constraint Demonstrated: Yes</li><li>• Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements</li><li>• OTC approval Yes – July 14, 2022 (Approval part of the ODOT annual amendment submission)</li><li>• Performance Measurements applicable: Yes – Safety</li><li>• Special Amendment Performance Assessment Required: No</li><li>• Were overall RTP Consistency checks achieved and satisfactory: Yes</li><li>• Can the required changes be made, or can the project be added to the MTIP without issues: Yes</li></ul>	
<p><b><u>Description of Changes</u></b> The September FFY 2023 Formal Amendment adds the new project to the MTIP allowing PE and construction to move forward and be obligated during FFY 2023. This is a new project being added to the STIP under ODOT's annual end of federal fiscal year adjustment. Under that ODOT process. Each year ODOT completes a programming reconciliation based on their projection of final available funding against the status of their projects. Necessary adjustments and submission of new projects occur through this process which is referred to as the ODOT Annual Amendment. The Annual amendment consolidates as many changes or new additions through a single STIP amendment request to the Oregon Transportation Commission (OTC).</p> <p>Based on the review, the new project was added to the ODOT Annual Amendment. See Attachment 1 (OTC Item) that provides additional details for the ODOT Annual Amendment.</p>	



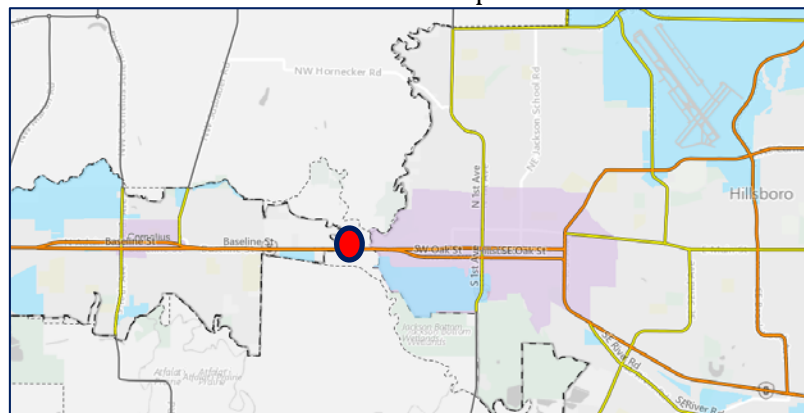
**Support Item(s):**

## ODOT Annual Amendment Funding Table

Key Number	Region	Project name	BMP	EMP	Bridge #
20435	1	OR99W: I-5 - McDonald St	7.47	13.74	
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136
22431	1	OR141/OR217 curb ramps	var	var	
22432	1	US30BY curb ramps	var	var	
22603	1	I-405 Fremont bridge (Willamette River) West ramps	var	var	
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2	
22613	1	Portland Metro and surrounding areas safety reserve	var	var	
18271	2	US101 at Asbury Creek	34.7	34.8	01796
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	075248, 07442, 16161

Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total
CN	Preservation	Fix-It Region 1 SW ADA	\$26,585,468.00	\$33,585,468.00
CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00
PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00
PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06
PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00
PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00
OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00
PE, CN		Fix-it SW Fish Pass	\$7,300,000.00	\$3,400,000.00
	Fish Passage			
PE & CN		Enhance Region 2 Fix-it SW Bridge	\$35,960,436.00	\$50,460,436.00
	Modernization			

## Location Maps





<b>Project #2</b>	<b>Portland Metro and Surrounding Areas Safety Reserve (New Project)</b>
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**Project Description:**

Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah, and Washington counties.

**Identifications/Key Consistency Check Areas:**

- Lead Agency: ODOT
- ODOT Key Number: **22613**
- MTIP ID#: New TBD – not yet assigned
- RTP ID: 12095
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval Yes – July 14, 2022 (Approval part of the ODOT annual amendment submission)
- Performance Measurements applicable: Yes – Safety
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment adds the new project to the MTIP. OTC approved the project for STIP inclusion as part of the FFY 2022 ODOT Annual Amendment. The Safety Reserve funding bucket functions similar to Emergency Relief funding scenarios. The Safety

Reserve will support urgent needed safety projects that are time sensitive and safety mitigation is an immediate priority.

As projects are approved, the funding will be split off from the safety reserve and programmed in the MTIP and STIP as individual projects. OTC has allocated \$1 million total from the HB2017 Safety category to support the Region 1 Safety Reserve. OTC approved the Region 1 Safety Reserve on July 22, 2022. See Attachment 1 (OTC Item) that provides additional details for the ODOT Annual Amendment.

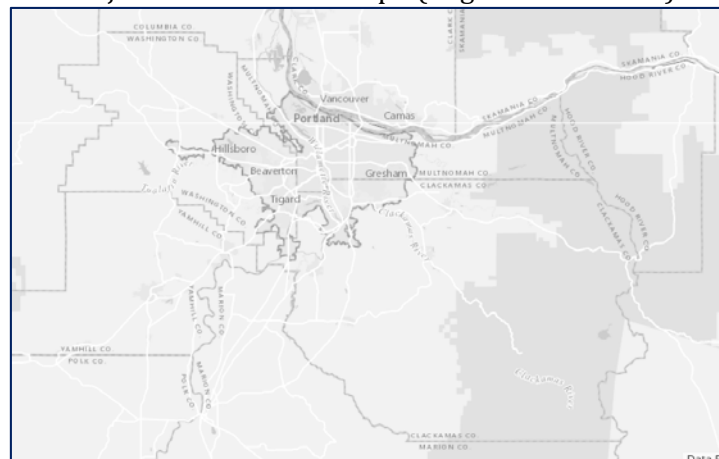
### Support Item(s):

ODOT Annual Amendment Funding Table

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22609	1	OR 8: East Lane (Cornelius)	15.2	15.2	
22613	1	Portland Metro and surrounding areas safety reserve	var	var	
18271	2	US101 at Asbury Creek	34.7	34.8	01796

Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total
CN	Preservation	Fix-It Region 1 SW ADA	\$26,585,468.00	\$33,585,468.00
CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00
PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00
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PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00
PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00
OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00
PE, CN	Fish Passage	Fix-it SW Fish Pass	\$7,300,000.00	\$3,400,000.00

Project Location Area Map - (Regional Locations)



<b>Project #3</b>	<b>Broadway Bridge Deck Replacement</b>
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**Project Description:**

Replace the existing roadway deck, including streetcar rails on the bascule span. Replace all the existing mechanical and electrical components to provide a safe and durable riding surface for vehicles and light rail. (Br # 06757)

**Identifications/Key Consistency Check Areas:**

- Lead Agency: Multnomah County
- ODOT Key Number: **22645**
- MTIP ID#: New TBD – not yet assigned
- RTP ID: 11902
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes – via ODOT Bridge program award confirmation
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval: No – approval from ODOT Bridge program for new funding award
- Performance Measurements applicable: Yes – Bridge
- Special Amendment Performance Assessment Required: No – The project is not capacity enhancing or exceeds \$100 million dollars
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment adds the new project to the MTIP. Multnomah County initiate Preliminary Engineering in FFY 2021 using their local funds. During FFY 2022 the ODOT Bridge Program awarded construction funds for the project. MTIP and STIP programming is now occurring.



The Broadway Bridge was built in 1911-12, with a new approach added in 1927 and an old approach replaced by the City of Portland in 1999-2002. It carries four lanes of automobile traffic and one streetcar line, and is also a popular river crossing for people on bicycles. It was originally painted black, but was repainted to “Golden Gate Red” in 1963.

Vertical clearance of the closed bascule span is adequate for the majority of river traffic, with openings necessary about 25 times per month, primarily to accommodate grain terminal ships.

The Broadway’s lift span deck is currently made of fiber-reinforced polymer (FRP) structural members. The existing FRP decking on the movable spans is retaining water and the structural beams have begun to fail, resulting in the need for extensive temporary repairs by County maintenance. The deck and supporting beams will be replaced with concrete-filled steel. This is the same type of deck that can currently be seen on the Morrison Bridge.

Multnomah County will also replace the sidewalks on the lift span, existing gears, motor brakes, machinery supports and flooring, and the machinery brakes that help control the movable spans. Just like a car, all our movable bridges need brakes to control the speed at which the bridge

closes. We will also be upgrading the electrical system to handle the new machinery. During construction, the streetcar tracks will be removed and put back in place. There will be no change in streetcar operations once the project is complete.

Construction is proposed to begin during Summer of 2023.

### Support Items:

ODOT Bridge Program LASB Minutes (Funding Award confirmation)

### LABSC Meeting Minutes 04/04/2022

#### Big Bridge Funding

Holly and Michael shared the presentation and spreadsheet for the Big Bridge portion of the Local Bridge Program. Jon led the discussion. Each bridge was reviewed, and Jon shared that the priority for Multnomah County is the Broadway Bridge project that includes the replacement of the FRP deck and machinery for the lift span. The City of Klamath Falls bridge has funding (Key 22042, PE \$271K, CN \$2.5M) which is insufficient. Holly shared there is an estimate for this project from a consultant for \$7.8M, but that is a scoping estimate. Holly suggested that this project should be included in the scoping effort that will take place this summer. Jon suggested using a \$5M placeholder for this bridge project.

The LABSC voted 9-0 to fully fund the first 3 big bridges on the list (Marion County, City of Eugene, Multnomah County Broadway Bridge), and to have the City of Klamath Falls Bridge included in the scoping effort this summer, with a \$5M placeholder for funding.

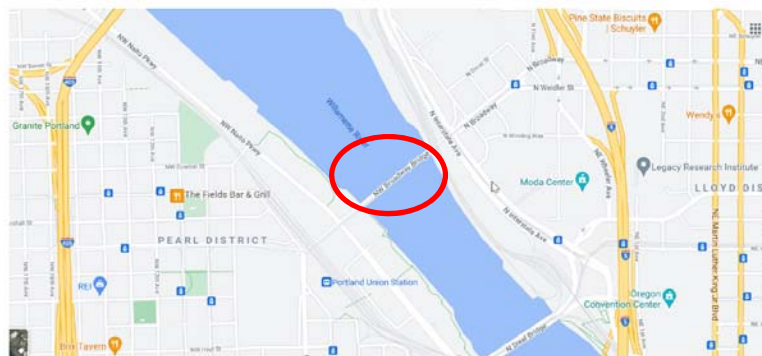
Large Rehab		\$31,024,910 Allocated										102.0% Allocation		(\$625,090) Remaining	
Bridge	Agency	Type	On-Off	Region	SRF	TBF	LDF	USF	sal (sole	nfs (near	hut (high	tmt	tmt		
05789A	Marion County	Rehab	On - Big	2	34.00	0.00	0.00	23.01	1.00	1.00	1.00	3027	1.30		
40056	City of Eugene	Rehab	On - Big	2	10.40	0.00	0.00	24.80	1.00	1.00	1.41	46253	1.41		
06757	Multnomah County	Rehab	On - Big	1	7.80	0.00	0.00	0.00	1.00	1.00	1.00	6174	1.41		
06757	Multnomah County	Rehab	On - Big	1	7.80	0.00	0.00	0.00	1.00	1.00	1.00	6174	1.41		
06757A	Multnomah County	Rehab	On - Big	1	0.00	0.00	0.00	0.00	1.00	1.00	1.00	790	1.20		
03849B	City of Klamath Falls	Rehab	On - Big	4	21.50	5.00	0.00	13.71	1.00	1.00	1.00	3836	1.30		

\$31,650,000 Selected						102.0% Allocation	
BNM	FCM	TRS	Report	Condition	Cost		
1.30	1.41	52.40	Rpt.	Fair	\$6,013,000		
1.41	1.40	34.84	Rpt.	Fair	\$1,837,000		
1.41	1.40	7.72	Rpt.	Fair	\$18,800,000		
1.41	1.40	7.72	Rpt.	Fair	\$15,785,000		
1.20	1.40	0.00	Rpt.	Poor	\$20,390,000		
1.30	1.40	36.59	Rpt.	Fair	\$5,000,000		

Construction phase estimated cost -->

#### Project Location





<b>Project #4</b>	<b>SMART Bus Purchase/PM/Amenities and Technology 2021</b>																																																															
<p><b><u>Project Description:</u></b> Maintenance and Bus Fleet Replacement and Software</p>																																																																
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> <li>• Lead Agency: SMART</li> <li>• ODOT Key Number: <b>20874</b></li> <li>• MTIP ID#: 70904</li> <li>• RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance</li> <li>• Proof-of Funding/Fiscal Constraint Demonstrated: Yes</li> <li>• Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements</li> <li>• OTC approval No – not applicable</li> <li>• Performance Measurements applicable: Yes – Transit</li> <li>• Special Amendment Performance Assessment Required: No</li> <li>• Were overall RTP Consistency checks achieved and satisfactory: Yes</li> <li>• Can the required changes be made, or can the project be added to the MTIP without issues: Yes</li> </ul>																																																																
<p><b><u>Description of Changes</u></b> The September FFY 2023 Formal Amendment increases the authorized FTA section 5307 funding for the project. The cost change is 43% which is above the FTA 30% threshold and requires a formal amendment to complete.</p> <p>The funding increase results from summer update to the authorize FTA formula apportionments to the Urbanized Area (UZA) and subsequent split among TriMet, SMART and C-Tran.</p>																																																																
<p><b>Support Items:</b></p> <table border="1"> <thead> <tr> <th colspan="3">Project Details</th> <th colspan="2">Programming History</th> <th colspan="4">Current Programming Amounts</th> </tr> <tr> <th>Key</th> <th>Lead Agency</th> <th>Project Name</th> <th>Current Programmed Year</th> <th>Federal Fund Type</th> <th>Federal</th> <th>Local</th> <th>Other</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td colspan="9"><b>FTA 5307 Funds</b></td> </tr> <tr> <td>20873</td> <td>SMART</td> <td>SMART Bus Purchase/PM Amenities and Technology 2020</td> <td>2023</td> <td>5307</td> <td>\$ 417,404</td> <td>\$ 104,351</td> <td>\$ -</td> <td>\$ 521,755</td> </tr> <tr> <td>20874</td> <td>SMART</td> <td>SMART Bus Purchase/PM Amenities and Technology 2021</td> <td>2023</td> <td>5307</td> <td>\$ 428,120</td> <td>\$ 107,030</td> <td>\$ -</td> <td>\$ 535,150</td> </tr> <tr> <td>22192</td> <td>SMART</td> <td>SMART Bus Purchase/PM/ Amenities and Technology 2022</td> <td>2023</td> <td>5307</td> <td>\$ 550,000</td> <td>\$ 137,500</td> <td>\$ -</td> <td>\$ 687,500</td> </tr> <tr> <td>22195</td> <td>SMART</td> <td>SMART Bus Purchase/PM/Amenities and</td> <td>2023</td> <td>5307</td> <td>\$ 550,000</td> <td>\$ 137,500</td> <td>\$ -</td> <td>\$ 687,500</td> </tr> </tbody> </table>		Project Details			Programming History		Current Programming Amounts				Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Federal	Local	Other	Total	<b>FTA 5307 Funds</b>									20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 104,351	\$ -	\$ 521,755	20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	\$ 428,120	\$ 107,030	\$ -	\$ 535,150	22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 550,000	\$ 137,500	\$ -	\$ 687,500	22195	SMART	SMART Bus Purchase/PM/Amenities and	2023	5307	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
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<b>Project #5</b>	<b>SMART Senior and Disabled Program (2022) (Canceled Project)</b>
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**Project Description:**

Services and Facility Improvements for Elderly and Disabled Customers

**Identifications/Key Consistency Check Areas:**

- Lead Agency: SMART
- ODOT Key Number: **22190**
- MTIP ID#: 71134
- RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: No
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment cancels the project from the MTIP and STIP. As a result of the summer FTA formula fund apportionment updates, SMART has agreed to swap the 5310 funds with TriMet for FTA Section 5307 funds. Key 22190 is being canceled.

**Support Items:**

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
<b>FTA 5310 Funds</b>									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	<del>\$ 41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	<del>\$ 41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	<del>\$ 41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	<del>\$ 41,000</del>	\$ -	\$ -	\$ -	\$ -

**Project #6 SMART Bus and Bus Facilities (Capital) 2022****Project Description:****Bus and Bus Facility Upgrades**

Change to --> **Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service**

**Identifications/Key Consistency Check Areas:**

- Lead Agency: SMART
- ODOT Key Number: **22191**
- MTIP ID#: 71139
- RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment decreases the authorized FTA Section 5339 funding to the project and slips the project to FFY 2024. The adjustment is being made per the updated FTA Urbanized Zone Area (UZA) apportionment which is then split among TriMet, SMART, and C-Tran.

**Support Items: FTA Apportionment Funding Update Split**

June 8, 2022  
Linda Gehrke, Regional Administrator  
Federal Transit Administration, Region X  
915 Second Avenue, Suite 3142  
Seattle, WA 98174-1002

Re: Split Letter for FFY2022 Apportionment funding

Dear Ms. Gehrke:

This letter confirms agreement between TriMet, SMART, and C-TRAN on distribution of the Federal FFY2022 full year apportionment Formula funding, ending September 30, 2022, available to the Portland, OR-WA Urbanized Area.

Formula funds include Section 5307 – Urbanized Area Funds (and Section 5340 – Growing States), Section 5337 – High Intensity Motorbus (HIMB), Section 5337 – High Intensity Fixed Guideway (HIFG), State of Good Repair Funds, Section 5339 – Bus and Bus Facilities Funds and Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Funds. Distribution of the funds are shown in the table as follows:

Agency	Section 5307	Section 5337 HIFG	Section 5337 HIMB	Section 5339	Section 5310	Total FFY2022 Formula Funds
TriMet	51,930,404 *	38,199,581	24,177	3,048,873	1,961,709 *	95,164,744
SMART	576,323 *	0	0	48,763	0 *	625,086
C-TRAN	7,201,228	0	164,470	616,915	545,101	8,529,714
<b>Total</b>	<b>\$ 59,707,955</b>	<b>\$ 38,199,581</b>	<b>\$ 188,647</b>	<b>\$ 3,716,551</b>	<b>\$ 2,506,810</b>	<b>\$104,319,544</b>

\* TriMet and SMART have agreed to a redistribution of SMART's allocation of Section 5310 funds (\$26,714) for TriMet's Section 5307 funds. Amounts in the above table have been adjusted to reflect that agreement.

Each agency will spend and report funds in accordance with respective requirements. If you have any questions or need additional information, please contact Nancy Young-Oliver at TriMet (503-962-5875), Kelsey Lewis at SMART (503-682-4523) or Julie Syring at C-Tran (360-906-7340).



**Project #7 SMART Bus Purchase/PM/ Amenities and Technology 2022****Project Description:**

Maintenance and Bus Fleet Replacement and Software

**Identifications/Key Consistency Check Areas:**

- Lead Agency: SMART
- ODOT Key Number: **22192**
- MTIP ID#: 71144
- RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment increases the authorized FTA section 5307 funding for the project. The cost change equals a 92% increase which is above the FTA 30% threshold and requires a formal amendment to complete.

The funding increase results from summer update to the authorize FTA formula apportionments to the Urbanized Area (UZA) and subsequent split among TriMet, SMART and C-Tran.

**Support Items:****UZA Apportionment Revised Split Letter**

June 8, 2022  
Linda Gehrke, Regional Administrator  
Federal Transit Administration, Region X  
915 Second Avenue, Suite 3142  
Seattle, WA 98174-1002

Re: Split Letter for FFY2022 Apportionment funding

Dear Ms. Gehrke:

This letter confirms agreement between TriMet, SMART, and C-TRAN on distribution of the Federal FFY2022 full year apportionment Formula funding, ending September 30, 2022, available to the Portland, OR-WA Urbanized Area.

Formula funds include Section 5307 – Urbanized Area Funds (and Section 5340 – Growing States), Section 5337 – High Intensity Motorbus (HIMB), Section 5337 – High Intensity Fixed Guideway (HIFG), State of Good Repair Funds, Section 5339 – Bus and Bus Facilities Funds and Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Funds. Distribution of the funds are shown in the table as follows:

Agency	Section 5307	Section 5337 HIFG	Section 5337 HIMB	Section 5339	Section 5310	Total FFY2022 Formula Funds
TriMet	51,930,404 *	38,199,581	24,177	3,048,873	1,961,709 *	95,164,744
SMART	576,323 *	0	0	48,763	0 *	625,086
C-TRAN	7,201,228	0	164,470	618,915	545,101	8,529,714
<b>Total</b>	<b>\$ 59,707,955</b>	<b>\$ 38,199,581</b>	<b>\$ 188,647</b>	<b>\$ 3,716,551</b>	<b>\$ 2,506,810</b>	<b>\$104,319,544</b>

\* TriMet and SMART have agreed to a redistribution of SMART's allocation of Section 5310 funds (\$26,714) for TriMet's Section 5307 funds. Amounts in the above table have been adjusted to reflect that agreement.

Each agency will spend and report funds in accordance with respective requirements. If you have any questions or need additional information, please contact Nancy Young-Oliver at TriMet (503-962-5875), Kelsey Lewis at SMART (503-682-4523) or Julie Syring at C-Tran (360-906-7340).

**Project #8 SMART Senior and Disabled Program (2023)****Project Description:**~~Services and Facility Improvements for Elderly and Disabled Customers~~**Provides overall ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.****Identifications/Key Consistency Check Areas:**

- Lead Agency: SMART
- ODOT Key Number: **22193**
- MTIP ID#: 71135
- RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment decreases the authorized FTA Section 5310 funding to the project. The adjustment is being made per the updated FTA Urbanized Zone Area (UZA) apportionment and fund trade between SMART and TriMet. The et cost change is 36% which is above the 30% threshold and requires a formal/full amendment to complete.

**Support Items: FTA Apportionment and EOY Funding Update Split**

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
<b>FTA 5310 Funds</b>									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	\$ <del>41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ <del>41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ <del>41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ <del>41,000</del>	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	\$ <del>41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	\$ <del>41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
5310 Totals:					\$ 246,000	\$ 106,464	\$ 26,616	\$ -	\$ 133,080

Project #9

SMART Bus and Bus Facilities (Capital) 2023

Project Description:

Bus and Bus Facility Upgrades

Change to --> Supports replacement/rehab of buses and related amenities to include equipment and amenities such as ADA lift and technology components and bus shelters and signs for continued service

Identifications/Key Consistency Check Areas:

Lead Agency: SMART

ODOT Key Number: 22194

MTIP ID#: 71145

RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance

Proof-of Funding/Fiscal Constraint Demonstrated: Yes

Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements

OTC approval No – not applicable

Performance Measurements applicable: Yes – Transit

Special Amendment Performance Assessment Required: No

Were overall RTP Consistency checks achieved and satisfactory: Yes

Can the required changes be made, or can the project be added to the MTIP without issues: Yes

Description of Changes

The September FFY 2023 Formal Amendment decreases the authorized FTA Section 5339 funding to the project and slips the project to FFY 2024. The adjustment is being made per the updated FTA Urbanized Zone Area (UZA) apportionment and subsequent fund trade between TriMet and SMART

Support Items:

FTA Apportionment and EOY Funding Update Split

FTA 5339 Funds									
20869	SMART	SMART Bus and Bus Facilities (Capital) 2019	2022	5339	\$ —70,000	\$ 47,887	\$ 9,577	\$ -	\$ 57,464
20870	SMART	SMART Bus and Bus Facilities (Capital) 2020	2022 2023	5339	\$ —76,800	\$ 53,644	\$ 13,411	\$ -	\$ 67,055
20871	SMART	SMART Bus and Bus Facilities (Capital) 2021	2023	5339	\$ —80,000	\$ 50,800	\$ 12,700	\$ -	\$ 63,500
22191	SMART	SMART Bus and Bus Facilities (Capital) 2022	2023 2024	5339	\$ —80,000	\$ 48,763	\$ 12,190	\$ -	\$ 60,953
22194	SMART	SMART Bus and Bus Facilities (Capital) 2023	2023 2024	5339	\$ —80,000	\$ 50,000	\$ 12,500	\$ -	\$ 62,500
22197	SMART	SMART Bus and Bus Facilities (Capital) 2024	2024	5339	\$ —80,000	\$ 50,000	\$ 12,500	\$ -	\$ 62,500

Project #10SMART Bus Purchase/PM/ Amenities and Technology 2023

Project Description:

Maintenance and Bus Fleet Replacement and Software

Identifications/Key Consistency Check Areas:

Lead Agency: SMART

ODOT Key Number: 22195

MTIP ID#: 71145

RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance

Proof-of Funding/Fiscal Constraint Demonstrated: Yes

Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements

OTC approval No – not applicable

Performance Measurements applicable: Yes – Transit

Special Amendment Performance Assessment Required: No

Were overall RTP Consistency checks achieved and satisfactory: Yes

Can the required changes be made, or can the project be added to the MTIP without issues: Yes

Description of Changes

The September FFY 2023 Formal Amendment increases the projected authorized FTA section 5307 funding for the project. The cost change equals an 84% increase which is above the FTA 30% threshold and requires a formal amendment to complete.

The funding increase results from summer update to the authorize FTA formula apportionments to the Urbanized Area (UZA) and subsequent split among TriMet, SMART and C-Tran.

Support Items:

FTA Apportionment and EOY Funding Update Split

Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5307 Funds									
20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 417,404	\$ 104,351	\$ -	\$ 521,755
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	<del>\$ 298,758</del>	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	<del>\$ 298,758</del>	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500

Project #11

SMART Senior and Disabled Program (2023)

Project Description:

Services and Facility Improvements for Elderly and Disabled Customers

Provides overall ADA & para-transit services to improve Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on travel training for seniors and people with disabilities in Wilsonville.

Identifications/Key Consistency Check Areas:

Lead Agency: SMART

ODOT Key Number: 22196

MTIP ID#: 71136

RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance

Proof-of Funding/Fiscal Constraint Demonstrated: Yes

Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements

OTC approval No – not applicable

Performance Measurements applicable: Yes – Transit

Special Amendment Performance Assessment Required: No

Were overall RTP Consistency checks achieved and satisfactory: Yes

Can the required changes be made, or can the project be added to the MTIP without issues: Yes

Description of Changes

The September FFY 2023 Formal Amendment decreases the authorized FTA Section 5310 funding to the project. The adjustment is being made per the updated FTA Urbanized Zone Area (UZA) apportionment and fund trade between SMART and TriMet. The net cost change is 36% which is above the 30% threshold and requires a formal/full amendment to complete.

Support Items:

FTA Apportionment and EOY Funding Update Split

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	<del>\$ 41,000</del>	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	<del>\$ 41,000</del>	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	<del>\$ 41,000</del>	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	<del>\$ 41,000</del>	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	<del>\$ 41,000</del>	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
5310 Totals:					\$ 246,000	\$ 106,464	\$ 26,616	\$ -	\$ 133,080

**Project #12 SMART Bus Purchase/PM/ Amenities and Technology 2024****Project Description:**

Maintenance and Bus Fleet Replacement and Software

**Identifications/Key Consistency Check Areas:**

- Lead Agency: SMART
- ODOT Key Number: **22198**
- MTIP ID#: 71146
- RTP ID: 12097 - SMART Operations - Operations of transit services, such as drivers, security, facilities and rolling stock maintenance
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment increases the projected authorized FTA section 5307 funding for the project. The cost change equals an 84% increase which is above the FTA 30% threshold and requires a formal amendment to complete.

The funding increase results from summer update to the authorize FTA formula apportionments to the Urbanized Area (UZA) and subsequent split among TriMet, SMART and C-Tran.

**Support Items:****FTA Apportionment and EOY Funding Update Split**

Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
<b>FTA 5307 Funds</b>									
20873	SMART	SMART Bus Purchase/PM Amenities and Technology 2020	2023	5307	\$ 417,404	\$ 417,404	\$ 104,351	\$ -	\$ 521,755
20874	SMART	SMART Bus Purchase/PM Amenities and Technology 2021	2023	5307	<del>\$ 298,758</del>	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	<del>\$ 298,758</del>	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	<del>\$ 298,758</del>	\$ 550,000	\$ 137,500	\$ -	\$ 687,500



**Project #13** **Transit-Oriented Development (TOD) program (FFY 2023)**  
**Preventive Maintenance Support (FFY 2023)**

**Project Description:**

~~Partner with developers and local jurisdictions to attract private development near transit stations to reduce auto trips and improve the cost-effectiveness of regional transit investments. (FY 2023 allocation year)~~

**Metro (RFFA Step 1) STBG/Local exchange supporting TriMet's Bus and Rail Preventative Maintenance program needs for labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's 3 county service district**

**Identifications/Key Consistency Check Areas:**

- Lead Agency: TriMet
- ODOT Key Number: **22164**  
*Added note: Because the project is being advanced from FFY 2025 which is outside of the STIP years, ODOT will assign a new Key number for the project.*
- MTIP ID#: 71103
- RTP ID: 11335 - Operating Capital: Equipment and Facilities Phase 1
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment advances the project from FFY 2025 to FFY 2023 and updates the project scope to reflect that TriMet will use the fund exchange STBG in support of their Preventative Maintenance program. The programmed STBG is part of the annual Metro-TriMet fund exchange. Metro exchanges STBG allocated to the Transit Oriented Development (TOD) program for local funds from TriMet.

Metro commits the local funds to support Metro TOD program activities. TriMet will apply the STBG via a flex transfer to FTA to their Preventative Maintenance program. The TOD STBG program in Key 22164 is set up as a placeholder for TriMet to evaluate how they will use the funds. Once decided, an amendment occurs to change the project to reflect how TriMet will use the funds. Normally, TriMet applies the STBG to their Preventative Maintenance program.

The origin of the STBG funds is the Regional Flexible Fund Allocation (RFFA) – Step 1 program. Verification of the annual allocation is stated in the RFFA Step1 Summary Table.

**Support Items:**

**RFFA Step 1 Summary Allocation Table**

	Federal Fiscal Year							
	2016	2017	2018	2019	2020	2021	2022	2023
HCT Bond	\$16,000,000	\$16,000,000	\$16,000,000	\$20,380,000	\$21,390,000	\$21,390,000	\$21,830,000	\$21,840,000
TOD	\$3,021,148	\$3,063,139	\$3,105,713	\$3,198,884	\$3,294,851	\$3,393,696	\$3,495,507	\$3,600,373
TSMO Grant bucket	\$1,523,092	\$1,546,545	\$1,570,363	\$1,585,262	\$1,534,801	\$1,478,467	\$1,667,159	\$1,717,173
TSMO Administration (Metro)				\$113,045	\$178,852	\$183,211	\$188,707	\$194,369
RTO	\$2,302,760	\$2,336,500	\$2,370,740	\$2,522,695	\$2,598,451	\$2,676,405	\$2,756,697	\$2,839,398
RTO - Safe Routes to Schools				\$485,000	\$500,000	\$515,000	\$530,450	\$546,364
Corridor & System Planning	\$507,427	\$514,963	\$522,610	\$538,288	\$554,437	\$571,070	\$588,202	\$605,848
Freight & Eco Devo System Planning				\$67,900	\$70,000	\$72,100	\$74,263	\$76,491
MPO Planning	\$1,173,042	\$1,208,233	\$1,244,480	\$1,281,815	\$1,320,269	\$1,359,877	\$1,400,673	\$1,442,694
Total Bond Commitment (annual)	\$16,000,000	\$16,000,000	\$16,000,000	\$20,380,000	\$21,390,000	\$21,390,000	\$21,830,000	\$21,840,000
Total Step 1 (annual)	\$8,527,469	\$8,669,380	\$8,813,906	\$9,792,889	\$10,051,661	\$10,249,826	\$10,701,659	\$11,022,709
Bond Commitment & Step 1 (annual)						\$31,639,826	\$32,531,659	\$32,862,709

**Project #14    TriMet Bus and Rail Preventive Maintenance (2023)****Project Description:**Capital Maintenance For Bus And Rail **to ensure continued service****Identifications/Key Consistency Check Areas:**

- Lead Agency: TriMet
- ODOT Key Number: **22181**
- MTIP ID#: 71210
- RTP ID: 11335 - Operating Capital: Equipment and Facilities Phase 1
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment increases the estimate FTA 5337 formula funds for TriMet. The increase results from a significant revised FFY 2022 Urbanized Zone Area (UZA) appropriation which resulted in FFY 2023 estimates. TriMet is a direct recipient for the appropriated funds and works directly with FTA on the UZA formula apportionments. TriMet identified the revised estimate during July. The formal amendment completes the required increase to the project.

The added funding increases the 5337 to \$39,370,471 resulting in a total project cost of \$49,213,088 which equals a 49% increase and is above the FTA 30% threshold for cost change administrative changes. This triggers the need for a formal amendment.

**Support Items:****TriMet EOY Revised FFY 2023 Formula Estimates**

	Programming History		Programming Changes				
Capital Maintenance For Bus and Rail to ensure continued service.	2023	5337 HIFG & HIMB	<del>\$ 26,356,662</del>	\$ 39,370,471	\$ 9,842,618	\$ -	\$ 49,213,088



**Project #15    Enhanced Seniors Mobility/Individuals w/Disabilities (2023) 5310****Project Description:**

Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area

**Identifications/Key Consistency Check Areas:**

- Lead Agency: TriMet
- ODOT Key Number: **22184**
- MTIP ID#: 71213
- RTP ID: 11334 - Operating Capital: Safety & Security Phase 1
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval No – not applicable
- Performance Measurements applicable: Yes – Transit
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes
- Can the required changes be made, or can the project be added to the MTIP without issues: Yes

**Description of Changes**

The September FFY 2023 Formal Amendment increases the estimated 5310 apportionment to TriMet for FFY 2023. Similar to the needed changes to TriMet's 5337 program, the 5310 increases resulted in a 52% cost change to the project and above the FTA threshold of 30% which triggered the need for the formal amendment.

**Support Items:****TriMet EOY Revised FFY 2023 Formula Estimates**

FTA 5310 Funds										
22183	71212	Enhanced Seniors Mobility/ Individuals w/Disabilities (2022) 5310	Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	2022 2023	5310	<del>\$ 1,843,824</del>	\$ 1,961,709	\$ 490,427	\$ 151,464	\$ 2,603,600
22184	71213	Enhanced Seniors Mobility/ Individuals w/Disabilities (2023) 5310	Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area	2023	5310	<del>\$ 1,405,487</del>	\$ 2,020,560	\$ 505,140	\$ 151,463	\$ 2,677,163

## METRO REQUIRED PROJECT AMENDMENT REVIEWS

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

- Verification and eligible to be programmed in the MTIP.
- Passes fiscal constraint verification.
- Passes the RTP consistency review. Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
- Consistent with RTP project costs when compared with programming amounts in the MTIP
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and has completed required air conformity analysis and transportation demand modeling
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP.
- If not directly identified in the RTP's constrained project list, the project is verified to be part of the MPO's annual Unified Planning Work Program (UPWP) if federally funded and a regionally significant planning study that addresses RTP goals and strategies and/or will contribute or impact RTP performance measure targets.
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
- Does not violate supplemental directive guidance from FHWA/FTA's approved Amendment Matrix.
- Reviewed and determined that Performance Measurement will or will not apply.
- Completion of the required 30 day Public Notification period:
- Meets MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

## APPROVAL STEPS AND TIMING

Metro's approval process for formal amendment includes multiple steps. The required approvals for the September FFY 2023 Formal MTIP amendment (SP23-01-SEP) will include the following:

<u>Action</u>	<u>Target Date</u>
• TPAC Agenda mail-out.....	August 26,2022
• Initiate the required 30-day public notification process.....	August 30, 2022
• <b>TPAC notification and approval recommendation.....</b>	<b>September 2, 2022</b>
• JPACT approval and recommendation to Council.....	September 15, 2022
• Completion of public notification process.....	September 28, 2022
• Metro Council approval.....	October 6, 2022

### Notes:

\* The above dates are estimates. JPACT and Council meeting dates could change.

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

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

- | <u>Action</u>   | <u>Target Date</u>   |
|---|----------------------|
| • Final amendment package submission to ODOT & USDOT..... | October 12, 2022     |
| • USDOT clarification and final amendment approval.....   | Early November, 2022 |

**ANALYSIS/INFORMATION**

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

**RECOMMENDED ACTION:**

**Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 22-52XX consisting of additions and changes or new projects which are required to be added to the MTIP enabling federal reviews and fund obligations to then occur in early Fall of 2022.**

One Attachment: OTC July 14, 2022 Annual Amendment Staff Item



# Oregon

Kate Brown, Governor


## Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE  
Salem, OR 97301-3871

**DATE:** June 30, 2022

**TO:** Oregon Transportation Commission



**FROM:** Kristopher W. Strickler  
Director

**SUBJECT:** Agenda Item L – Annual STIP Adjustment

**Requested Action:**

Approve the attached list of added, modified, or canceled projects to the STIP.

**Background:**

Previously, when new project opportunities arose, actions were taken on a project-by-project basis. This was not efficient as it increased the number of amendments approved by the OTC, the Director, or the Delivery & Operations Division Administrator.

At the July 15, 2021 Oregon Transportation Commission meeting, a new proposed yearly OTC approval process was presented for an annual approval of the majority of STIP amendments. The OTC approved the new process. And in September 2021, the OTC approved the first annual STIP amendment.

This is the 2022 annual amendment. The attached list of added, modified, or canceled projects for the 21-24 STIP consists of the highest priority projects for each region (as determined by the region). These projects will be paid for with pre-determined funding reserves and/or the additional funding from the Infrastructure Investments and Jobs Act (IIJA).

In accordance with Governor Brown's Executive Order on Climate (EO 20-04), the Climate Office analyzed the 2022 STIP adjustments, assessing changes in climate outcomes. A majority of projects address increasing costs due to inflationary pressures. An additional set contain newly scoped project features or new projects. These funding decisions were assessed for whether their impact would be positive, neutral, or challenging towards ODOT's climate goals.

This process informs and monitors STIP decisions as the climate lens was applied to the 24-27 STIP and March 2022 Infrastructure Investment and Jobs Act (IIJA) funding allocation decisions, using the 2021-24 STIP as a baseline. More information on these results and the associated methodology can be found in Attachment 2.

Oregon Transportation Commission

June 30, 2022

Page 2

**Next Steps:**

With approval, ODOT will add, modify or cancel the attached projects in the 21-24 STIP.

Without approval, the OTC, Director, or Delivery & Operations Division Administrator will review and act upon each project as a separate amendment.

**Attachments:**

- Attachment 1 – 2022 Annual STIP Amendment – Project List
- Attachment 2 – Applying Climate Lens to the 2022 Annual STIP Adjustment

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
20435	1	OR99W: I-5 - McDonald St	7.47	13.74		CN	Preservation	Fix-It Region 1 SW ADA	\$26,000.00	\$35,285,466.00	\$35,259,466.00	Attachment 1: QTC July 14, 2022 Annual Amendment Staff Item
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00	\$2,537,377.00	Increase the Construction phase, adding funds for ADA and preservation scope.
22431	1	OR141/OR217 curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00	\$1,925,639.00	Add CN phase for 2024.
22432	1	US30BY curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06	\$8,333,068.06	Increase PE & RW
22603	1	I-405 Fremont bridge (Willamette River) West ramps	var	var		PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00	\$11,759,000.00	Add new project
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new project
22613	1	Portland Metro and surrounding areas safety reserve	var	var		OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new safety bucket
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00	Cancel CN phase. Add \$1.6M to PE. Schedule extended due to additional design work needed for fish passage. CN will be funded in next STIP.
							Fish Passage					
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00	Add \$500k to PE and \$14M to CN for full length widening to 3 lanes SB, replace Battle Cr Rd Br, add broadband to entire project length and inflation costs. Add NB Commercial St Br to location data.
							Modernization					
21538	2	I-105: Willamette R - Pacific Hwy	0.91	3.99	08689B, 08689C, 08689D, 08689E, 08689F, 08700A, 08965E	CN		Fix-It SW IM Fix-It SW Bridge	\$6,981,420.00	\$11,221,527.00	\$4,240,107.00	Add \$4,240,107 to CN to account for increase in paving material cost. Add bridge locations that were not added per CMR-01, update description to include repairing delamination on bridges.
							Preservation					
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert	\$2,000,000.00	\$2,946,123.00	\$946,123.00	Add \$946,123 to CN phase due to stream enhancement, inflation and increased materials cost.
							Fish Passage					
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition	\$11,109,200.00	\$12,063,225.00	\$954,025.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition	\$6,330,298.00	\$9,075,262.00	\$2,744,964.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed	\$1,757,001.00	\$750,000.00	-\$1,007,001.00	Cancel CN phase. Project can't be delivered within current schedule. Add \$454,999 to PE. Project expanded to entire city portion of trail route.
							Bike/Ped					
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
							Modernization					
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2	\$0.00	\$3,300,000.00	\$3,300,000.00	Add new CN-only project to complete paving project. Design was completed in K21548. Due to cost escalation the construction scope of that KN was reduced.
							Preservation					
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2	\$0.00	\$1,400,000.00	\$1,400,000.00	Add a new design-only project to construct a roundabout using \$500k Rail funds and \$900k of Region 2 funds.
							Operations					
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety	\$7,269,656.00	\$4,969,328.00	-\$2,300,328.00	Moving HB2017 Safety funds to new project K22597 for chip seal and safety improvements on US199 and OR42
							OP-ITS					
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS	\$3,237,000.00	\$4,417,000.00	\$1,180,000.00	Project was selected for SWIP strategic program. Project also adds local funds. Scope added for additional pedestrian features and sidewalks.
							Modernization					
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3	\$5,758,962.00	\$15,356,000.00	\$9,597,038.00	Combine portion of scope from K21713, advance CN funds from 24-27 STIP to fund addition of NB portion of project previously funded through PE
							Preservation					
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
							Preservation					
21676	3	OR99/OR238/OR62: Big X Intersection (Medford)	var	var	18525, 06605A, 08821, 09590	PE & CN		HB2017 Preservation JTA	\$11,162,700.00	\$14,273,172.00	\$3,110,472.00	Adding JTA and SW HB2017 funds; removing some AT Leverage and Fix-It SW Bridge funds to make project whole.
							Preservation					
21677	3	OR42: Lookinglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Adding IJA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
							Preservation					
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3	\$1,159,000.00	\$1,995,000.00	\$836,000.00	Adding funds from CN phase of 21698 to fund DAP estimate of this higher priority project
							Operations					
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3	\$969,000.00	\$133,000.00	-\$836,000.00	Cancel CN phase of this project to fund higher priority project; K21680. CN phase of this project will be a priority in the 24-27 STIP
							Operations					
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3	\$2,722,800.00	\$0.00	-\$2,722,800.00	Cancel project; scope and funding added to K21673 and K21674; Savings will go back to the R3 ARTS program
							Safety					

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22384	3	OR99: Glenwood - Coleman Creek	10.23	11.03		CN	Operations	SW Pedbike Strategic AT Leverage	\$19,900.00	\$1,127,496.00	\$1,107,596.00	Attachment 1: OTC July 14, 2022 Annual Amendment Staff Item
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	var	var		PE & RW	ADA	SW ADA Transition	\$6,427,380.00	\$8,066,607.00	\$1,639,227.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22438	3	Jackson County curb ramps, phase 2	var	var		PE & RW	ADA	SW ADA Transition	\$5,247,353.00	\$8,476,501.00	\$3,229,148.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22597	3	OR42: Lookingglass Crk - Benedict & US199: Applegate - CA	var	var		PE, CN, & OT	Preservation	SW Chip Seal, HB2017 Safety Region 3	\$0.00	\$8,471,000.00	\$8,471,000.00	Add new priority safety project. Funds coming from K21677 and K20166
	3	Payton Bridge Deck Rehabilitation	35.41	35.41	16063	PE	Bridge	Fix-It SW Bridge	\$0.00	\$1,235,000.00	\$1,235,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
	3	I-5: Cabin Creek - Sutherlin	136.52	143		PE	Preservation	Fix-It SW IM	\$0.00	\$750,000.00	\$750,000.00	New Project to review existing forensic info and complete additional field investigation to determine extent of repairs needed. Once identified, will design project through DAP
	3	OR99: Rogue River Bridge, Gold Hill Spur	2.65	2.65	00576	PE	Bridge	Fix-It SW Bridge	\$0.00	\$2,139,000.00	\$2,139,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
20011	4	US20: Tumalo - Cooley Rd. (Bend)	14.31	18.3		CN	Preservation	Enhance region 4 - \$914,939 R4 Highway Leverage Region 4 - \$44,874 R4 Fix-It Region 4 - \$700,000 ARTS Region 4 - \$1,485,745	\$20,446,815.00	\$23,592,373.00	\$3,145,558.00	Additional funds being added to account for market changes and construction cost increases. Project current includes HWY Leverage, Safety, Preservation, ARTS funds; the added funds reflect increases in the corresponding construction items.
20167	4	OR126: Redmond-Powell Butte	0.22	6.9		PE, RW, UR, & CN	Preservation	Fix-it SW Bridge - \$868,697 SWIP - \$122,692 Fix-It Region 4 - \$3,310,458	\$8,917,395.00	\$13,219,242.00	\$4,301,847.00	Additional preservation funds being added to account for market changes and construction cost increases, bridge funds are being added to address new bridge scope added to the project, SWIP funds added to address sidewalk deficiencies.
21644	4	I-84: Rufus and Arlington Bridge deck rehabilitation	108.96 137.77	109.06 138.05	08820 & 09213	CN	Bridge	Fix-it SW Bridge	\$9,908,366.00	\$17,440,923.00	\$7,532,557.00	Approximately half of the funds being added are to account for market changes and construction cost increases. The remaining funds are needed to account for added bridge scope, with one bridge on I-84 being added as well as one bridge on US197. The US197 bridge will be moving \$745,789 in CN funds from K21640 to K21644.
22442	4	Sisters and Bend curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$6,502,701.00	\$9,042,316.00	\$2,539,615.00	Increase the Preliminary Engineering and Right of Way phase estimates.
22473	4	Chiloquin Community Safe and Healthy Connections				PE & CN	BikePed	SW Off-Sys BikePed	\$508,525.00	\$0.00	-\$508,525.00	Cancelling as the city withdrew their application.
22607	4	Revere Avenue Rail Crossing (Bend)				PL	Safety	SW Rail Crossing	\$0.00	\$500,000.00	\$500,000.00	Add new project for planning and analysis for ped/bike improvements, ADA accommodations, cross section modifications, signal upgrades, and crossing surface upgrades to improve the safety of the existing rail crossing.
22616	4	Reed Rd Rail Crossing (LaPine)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22617	4	Celilo Frontage Road Rail Crossing (Celilo Village)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22618	4	Merrill Pit Road Rail Crossing (Klamath County)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates, lighting, signage and striping to improve the safety of the existing rail crossing for the traveling public.
22620	4	US97: Bridge Over OR422 (Chiloquin)	247.54	247.54	06886	PE, RW, UR, & CN	Bridge	Fix-it SW Bridge	\$0.00	\$1,285,401.00	\$1,285,401.00	Add new project for structural overlay for the bridge.
	4	Warm Springs Tribe fund transfer				OT	Bike/Ped	SW Off Sys BikePed	\$0.00	\$319,080.80	\$319,080.80	Add a new project to transfer funds to the Bureau of Indian Affairs (BIA).
21873	5	OR86: Fish Creek	63.22	63.22		CN	Culvert	Fix-it SW Culvert	\$4,854,007.00	\$5,854,007.00	\$1,000,000.00	add \$1M CON for inflation.
21874	5	Morgan Lake Road safety improvements				CN	Safety	ARTS Region 5	\$1,283,369.00	\$1,782,562.00	\$499,193.00	add \$499,193 CON for inflation
21877	5	I-84: Emigrant Hill - Meacham (west-bound)	217.77	237.99		CN	Preservation	Fix-it SW IM	\$4,568,908.00	\$5,215,159.00	\$646,251.00	Add \$646,251 CON for inflation
21898	5	Baker & Union Counties Traffic Signal Safety Improvements	var	var		CN	Safety	ARTS Region 5	\$1,142,999.00	\$2,144,515.00	\$1,001,516.00	add \$1,001,516 CON for inflation
22383	5	OR86: Guardrail Upgrades Final Phase	34.03	70.75		CN	Safety	1R, Fix-it SW Bridge	\$3,469,000.00	\$5,392,000.00	\$1,923,000.00	add \$1.6M to Construction for inflation and \$323,000 in bridge funding for new scope.

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22445	5	Burns & Hines curb ramps	0 128.00	0.50 132.2		PE & RW		SW ADA Transition	\$5,222,246.00	\$7,261,783.00	\$2,039,537.00	Increased the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22446	5	Grant County curb ramps	var	var		PE & RW		SW ADA Transition	\$4,544,038.00	\$6,279,410.00	\$1,735,372.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22447	5	Jordan Valley/Ontario/Huntington/Adrian curb ramps	var	var		PE & RW		SW ADA Transition, Fix-it SW SWIP bikeped	\$3,163,476.00	\$5,750,309.00	\$2,586,833.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22453	5	Belt Park Greenway Trail (Hermiston)				PE & CN		SW Off Sys BikePed	\$297,000.00	\$297,000.00	\$0.00	Cancel the Construction phase, moving funds to the Preliminary Engineering phase.
	5	OR52 Snake River Bridge (Payette)	21.3		04335A	PE & RW	Bridge	Fix-it SW Bridge	\$0.00	\$3,651,550.00	\$3,651,550.00	Add New Project PE=\$3,603,600 ROW=\$47,950
	5	I-82: Eastbound Umatilla (Columbia River) Bridge Phase 2	0	0.39	02230A	PE	Bridge	Fix-it SW Bridge	\$0.00	\$715,650.00	\$715,650.00	Add New Project
21797	6	Safe Routes to School non-infrastructure FFY 23-24				OT		SW SRTS Education, SW SRTS	\$1,000,000.00	\$3,000,000.00	\$2,000,000.00	Increase the project cost by \$2,000,000, combining in project key 21798 (\$1M) and adding IJIA flexible funds allocated to the Safe Routes to School program (\$1M).
21820	6	Workforce Development SFY24				OT		SW Work Dev/OJT	\$2,550,000.00	\$3,600,000.00	\$1,050,000.00	Advance \$1,050,000 from the 24-27 STIP, adding funding for SFY 25. Update project name to Workforce Development SFY24-25.
	6	Oregon Community Paths Scoping Support				PL		SW Off Sys BikePed	\$0.00	\$222,890.90	\$222,890.90	Add a new project for ODOT HQ to provide scoping support to local agencies for the upcoming Oregon Community Paths grant solicitation cycle. \$200,000 fed matched by \$22,891 TOF split from K22481.
	6	Safe Routes to School Project Identification Program SFY 23-24				OT		SW SRTS	\$0.00	\$750,000.00	\$750,000.00	Add a new project, using IJIA flexible funds allocated to the Safe Routes to School program.
	6	Safe Routes to School Quick Build Signs and Lines				PL & OT		SW SRTS	\$0.00	\$100,000.00	\$100,000.00	Add a new project, using IJIA flexible funds allocated to the Safe Routes to School program. \$50K for a PL phase and \$50K for an OTH phase for ODOT HQ to perform planning activities and purchase equipment for future quick build signs and lines projects to be delivered by local agencies.
	6	Culvert Repair Mitigation				OT		HB2017 Culvert	\$0.00	\$4,410,000.00	\$4,410,000.00	Add a new project. These are state funds to be transferred to ODFW per the ODFW-ODOT Culvert Repair Programmatic Agreement (CRPA).
									\$269,890,414.00	\$423,005,139.76	\$153,114,725.76	

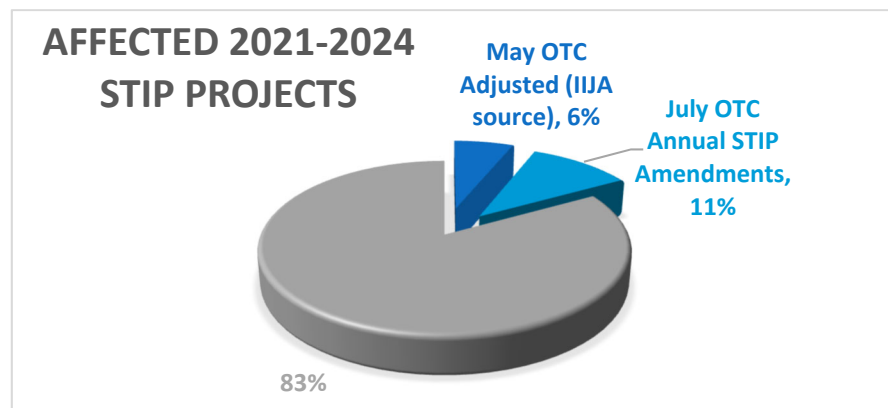


### Applying Climate Lens to the 2022 Annual STIP Adjustment

In accordance with Governor Brown's Executive Order on Climate (EO 20-04), the ODOT Climate Office reviewed the 2022 STIP adjustments (May 2022 and July 2022 Annual) using the climate lens. This document provides high-level observations from that analysis. The annual adjustment contains amendments to nearly 80 existing and new projects that will be added to the 21-24 STIP.

### Scope of Analysis

The analysis observations below are based on the Climate Office review of this limited subset of projects, not the full 2021-2024 STIP. The May 2022 Adjustment (with primarily Infrastructure Investment and Jobs Act (IIJA) funds) and the July Annual STIP amendments are 17% of the 21-24 STIP funding representing \$211M in new funds added to a \$426M base for these projects. These funding decisions were assessed for whether their impact would be positive, neutral, or challenging towards ODOT's climate goals. A majority of project adjustments address increasing costs due to inflationary pressures. An additional set are newly scoped project features, including \$47M in new projects.



### Process

Staff assessed each project using 23 identified project attributes that tie to seven priority outcome areas (listed below) and assigned a dollar value to each based on its portion of the total project.

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

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

This process informs and monitors STIP decisions as the climate lens was applied to the 24-27 STIP and March 2022 primarily Infrastructure Investment and Jobs Act (IIJA) funding allocation decisions, using the 2021-24 STIP as a baseline. Some variability from year to year is expected based on project timing changes.

## **Results: Key Climate Observations**

The 2022 STIP adjustments will result in a net increase of \$211 million programmed project funding: \$59M in May, \$152M in July once approved. The rough return on investment calculation, based on projected outcomes and co-benefits anticipated, shows that these investments will generate \$454 million of new benefits when we look at co-benefits across outcome areas: \$93M in May, \$361 in July. The May projects show a smaller net return, as some of the projects' benefits are offset by investments that may contribute to more emissions.



### **Climate Adaptation/Resilience**

Climate Adaptation/Resilience will see 12% of \$454M projected new benefits.

These include investments in bridges and culverts in nearly all regions, including a fish passage structure with greater environmental and resilience outcomes over a standard culvert in the same location.

Later in 2022, a new Climate Hazard Mapping system will increase the agency's ability to identify priority locations for climate resiliency projects.



### **Climate Greenhouse Gas Emissions Reduction/Mitigation**

GHG Emissions Reduction/Mitigation will see 6% of \$454M projected new benefits.

Several projects improve high priority Active Transportation Needs Inventory (ATNI) corridor segments for bicycling and ADA usage, and benefit areas with high equity populations.

These gains are offset by nearly \$40M in additional funding for six larger roadway enhancement projects.



# Oregon

Kate Brown, Governor

## Oregon Transportation Commission


Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

**DATE:** June 30, 2022

**TO:** Oregon Transportation Commission



**FROM:** Kristopher W. Strickler  
Director

**SUBJECT:** Agenda Item L – Annual STIP Adjustment

**Requested Action:**

Approve the attached list of added, modified, or canceled projects to the STIP.

**Background:**

Previously, when new project opportunities arose, actions were taken on a project-by-project basis. This was not efficient as it increased the number of amendments approved by the OTC, the Director, or the Delivery & Operations Division Administrator.

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22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new project
22613	1	Portland Metro and surrounding areas safety reserve	var	var		OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new safety bucket
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00	Cancel CN phase. Add \$1.6M to PE. Schedule extended due to additional design work needed for fish passage. CN will be funded in next STIP.
							Fish Passage					
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00	Add \$500k to PE and \$14M to CN for full length widening to 3 lanes SB, replace Battle Cr Rd Br, add broadband to entire project length and inflation costs. Add NB Commercial St Br to location data.
							Modernization					
21538	2	I-105: Willamette R - Pacific Hwy	0.91	3.99	08689B, 08689C, 08689D, 08689E, 08689F, 08700A, 08965E	CN		Fix-It SW IM Fix-It SW Bridge	\$6,981,420.00	\$11,221,527.00	\$4,240,107.00	Add \$4,240,107 to CN to account for increase in paving material cost. Add bridge locations that were not added per CMR-01, update description to include repairing delamination on bridges.
							Preservation					
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert	\$2,000,000.00	\$2,946,123.00	\$946,123.00	Add \$946,123 to CN phase due to stream enhancement, inflation and increased materials cost.
							Fish Passage					
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition	\$11,109,200.00	\$12,063,225.00	\$954,025.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition	\$6,330,298.00	\$9,075,262.00	\$2,744,964.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed	\$1,757,001.00	\$750,000.00	-\$1,007,001.00	Cancel CN phase. Project can't be delivered within current schedule. Add \$454,999 to PE. Project expanded to entire city portion of trail route.
							Bike/Ped					
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
							Modernization					
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2	\$0.00	\$3,300,000.00	\$3,300,000.00	Add new CN-only project to complete paving project. Design was completed in K21548. Due to cost escalation the construction scope of that KN was reduced.
							Preservation					
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2	\$0.00	\$1,400,000.00	\$1,400,000.00	Add a new design-only project to construct a roundabout using \$500k Rail funds and \$900k of Region 2 funds.
							Operations					
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety	\$7,269,656.00	\$4,969,328.00	-\$2,300,328.00	Moving HB2017 Safety funds to new project K22597 for chip seal and safety improvements on US199 and OR42
							OP-ITS					
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS	\$3,237,000.00	\$4,417,000.00	\$1,180,000.00	Project was selected for SWIP strategic program. Project also adds local funds. Scope added for additional pedestrian features and sidewalks.
							Modernization					
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3	\$5,758,962.00	\$15,356,000.00	\$9,597,038.00	Combine portion of scope from K21713, advance CN funds from 24-27 STIP to fund addition of NB portion of project previously funded through PE
							Preservation					
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
							Preservation					
21676	3	OR99/OR238/OR62: Big X Intersection (Medford)	var	var	18525, 06605A, 08821, 09590	PE & CN		HB2017 Preservation JTA	\$11,162,700.00	\$14,273,172.00	\$3,110,472.00	Adding JTA and SW HB2017 funds; removing some AT Leverage and Fix-It SW Bridge funds to make project whole.
							Preservation					
21677	3	OR42: Lookinglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Adding IJA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
							Preservation					
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3	\$1,159,000.00	\$1,995,000.00	\$836,000.00	Adding funds from CN phase of 21698 to fund DAP estimate of this higher priority project
							Operations					
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3	\$969,000.00	\$133,000.00	-\$836,000.00	Cancel CN phase of this project to fund higher priority project; K21680. CN phase of this project will be a priority in the 24-27 STIP
							Operations					
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3	\$2,722,800.00	\$0.00	-\$2,722,800.00	Cancel project; scope and funding added to K21673 and K21674; Savings will go back to the R3 ARTS program
							Safety					

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22384	3	OR99: Glenwood - Coleman Creek	10.23	11.03		CN	Operations	SW Pedbike Strategic AT Leverage	\$19,900.00	\$1,127,496.00	\$1,107,596.00	Attachment 1: OTC July 14, 2022 Annual Amendment Staff Item
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	var	var		PE & RW	ADA	SW ADA Transition	\$6,427,380.00	\$8,066,607.00	\$1,639,227.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22438	3	Jackson County curb ramps, phase 2	var	var		PE & RW	ADA	SW ADA Transition	\$5,247,353.00	\$8,476,501.00	\$3,229,148.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22597	3	OR42: Lookingglass Crk - Benedict & US199: Applegate - CA	var	var		PE, CN, & OT	Preservation	SW Chip Seal, HB2017 Safety Region 3	\$0.00	\$8,471,000.00	\$8,471,000.00	Add new priority safety project. Funds coming from K21677 and K20166
	3	Payton Bridge Deck Rehabilitation	35.41	35.41	16063	PE	Bridge	Fix-It SW Bridge	\$0.00	\$1,235,000.00	\$1,235,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
	3	I-5: Cabin Creek - Sutherlin	136.52	143		PE	Preservation	Fix-It SW IM	\$0.00	\$750,000.00	\$750,000.00	New Project to review existing forensic info and complete additional field investigation to determine extent of repairs needed. Once identified, will design project through DAP
	3	OR99: Rogue River Bridge, Gold Hill Spur	2.65	2.65	00576	PE	Bridge	Fix-It SW Bridge	\$0.00	\$2,139,000.00	\$2,139,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
20011	4	US20: Tumalo - Cooley Rd. (Bend)	14.31	18.3		CN	Preservation	Enhance region 4 - \$914,939 R4 Highway Leverage Region 4 - \$44,874 R4 Fix-It Region 4 - \$700,000 ARTS Region 4 - \$1,485,745	\$20,446,815.00	\$23,592,373.00	\$3,145,558.00	Additional funds being added to account for market changes and construction cost increases. Project current includes HWY Leverage, Safety, Preservation, ARTS funds; the added funds reflect increases in the corresponding construction items.
20167	4	OR126: Redmond-Powell Butte	0.22	6.9		PE, RW, UR, & CN	Preservation	Fix-it SW Bridge - \$868,697 SWIP - \$122,692 Fix-It Region 4 - \$3,310,458	\$8,917,395.00	\$13,219,242.00	\$4,301,847.00	Additional preservation funds being added to account for market changes and construction cost increases, bridge funds are being added to address new bridge scope added to the project, SWIP funds added to address sidewalk deficiencies.
21644	4	I-84: Rufus and Arlington Bridge deck rehabilitation	108.96 137.77	109.06 138.05	08820 & 09213	CN	Bridge	Fix-it SW Bridge	\$9,908,366.00	\$17,440,923.00	\$7,532,557.00	Approximately half of the funds being added are to account for market changes and construction cost increases. The remaining funds are needed to account for added bridge scope, with one bridge on I-84 being added as well as one bridge on US197. The US197 bridge will be moving \$745,789 in CN funds from K21640 to K21644.
22442	4	Sisters and Bend curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$6,502,701.00	\$9,042,316.00	\$2,539,615.00	Increase the Preliminary Engineering and Right of Way phase estimates.
22473	4	Chiloquin Community Safe and Healthy Connections				PE & CN	BikePed	SW Off-Sys BikePed	\$508,525.00	\$0.00	-\$508,525.00	Cancelling as the city withdrew their application.
22607	4	Revere Avenue Rail Crossing (Bend)				PL	Safety	SW Rail Crossing	\$0.00	\$500,000.00	\$500,000.00	Add new project for planning and analysis for ped/bike improvements, ADA accommodations, cross section modifications, signal upgrades, and crossing surface upgrades to improve the safety of the existing rail crossing.
22616	4	Reed Rd Rail Crossing (LaPine)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22617	4	Celilo Frontage Road Rail Crossing (Celilo Village)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22618	4	Merrill Pit Road Rail Crossing (Klamath County)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates, lighting, signage and striping to improve the safety of the existing rail crossing for the traveling public.
22620	4	US97: Bridge Over OR422 (Chiloquin)	247.54	247.54	06886	PE, RW, UR, & CN	Bridge	Fix-it SW Bridge	\$0.00	\$1,285,401.00	\$1,285,401.00	Add new project for structural overlay for the bridge.
	4	Warm Springs Tribe fund transfer				OT	Bike/Ped	SW Off Sys BikePed	\$0.00	\$319,080.80	\$319,080.80	Add a new project to transfer funds to the Bureau of Indian Affairs (BIA).
21873	5	OR86: Fish Creek	63.22	63.22		CN	Culvert	Fix-it SW Culvert	\$4,854,007.00	\$5,854,007.00	\$1,000,000.00	add \$1M CON for inflation.
21874	5	Morgan Lake Road safety improvements				CN	Safety	ARTS Region 5	\$1,283,369.00	\$1,782,562.00	\$499,193.00	add \$499,193 CON for inflation
21877	5	I-84: Emigrant Hill - Meacham (west-bound)	217.77	237.99		CN	Preservation	Fix-it SW IM	\$4,568,908.00	\$5,215,159.00	\$646,251.00	Add \$646,251 CON for inflation
21898	5	Baker & Union Counties Traffic Signal Safety Improvements	var	var		CN	Safety	ARTS Region 5	\$1,142,999.00	\$2,144,515.00	\$1,001,516.00	add \$1,001,516 CON for inflation
22383	5	OR86: Guardrail Upgrades Final Phase	34.03	70.75		CN	Safety	1R, Fix-it SW Bridge	\$3,469,000.00	\$5,392,000.00	\$1,923,000.00	add \$1.6M to Construction for inflation and \$323,000 in bridge funding for new scope.

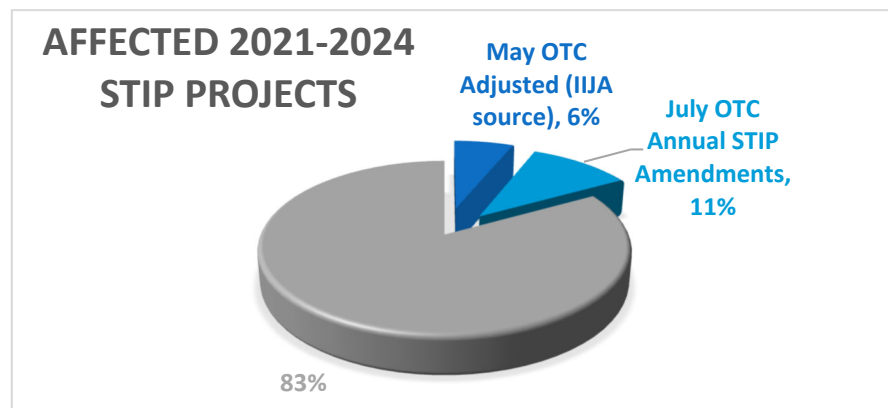
Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22445	5	Burns & Hines curb ramps	0 128.00	0.50 132.2		PE & RW		SW ADA Transition	\$5,222,246.00	\$7,261,783.00	\$2,039,537.00	Increased the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22446	5	Grant County curb ramps	var	var		PE & RW		SW ADA Transition	\$4,544,038.00	\$6,279,410.00	\$1,735,372.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22447	5	Jordan Valley/Ontario/Huntington/Adrian curb ramps	var	var		PE & RW		SW ADA Transition, Fix-it SW SWIP bikeped	\$3,163,476.00	\$5,750,309.00	\$2,586,833.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22453	5	Belt Park Greenway Trail (Hermiston)				PE & CN		SW Off Sys BikePed	\$297,000.00	\$297,000.00	\$0.00	Cancel the Construction phase, moving funds to the Preliminary Engineering phase.
	5	OR52 Snake River Bridge (Payette)	21.3		04335A	PE & RW	Bridge	Fix-it SW Bridge	\$0.00	\$3,651,550.00	\$3,651,550.00	Add New Project PE=\$3,603,600 ROW=\$47,950
	5	I-82: Eastbound Umatilla (Columbia River) Bridge Phase 2	0	0.39	02230A	PE	Bridge	Fix-it SW Bridge	\$0.00	\$715,650.00	\$715,650.00	Add New Project
21797	6	Safe Routes to School non-infrastructure FFY 23-24				OT		SW SRTS Education, SW SRTS	\$1,000,000.00	\$3,000,000.00	\$2,000,000.00	Increase the project cost by \$2,000,000, combining in project key 21798 (\$1M) and adding IJIA flexible funds allocated to the Safe Routes to School program (\$1M).
21820	6	Workforce Development SFY24				OT		SW Work Dev/OJT	\$2,550,000.00	\$3,600,000.00	\$1,050,000.00	Advance \$1,050,000 from the 24-27 STIP, adding funding for SFY 25. Update project name to Workforce Development SFY24-25.
	6	Oregon Community Paths Scoping Support				PL		SW Off Sys BikePed	\$0.00	\$222,890.90	\$222,890.90	Add a new project for ODOT HQ to provide scoping support to local agencies for the upcoming Oregon Community Paths grant solicitation cycle. \$200,000 fed matched by \$22,891 TOF split from K22481.
	6	Safe Routes to School Project Identification Program SFY 23-24				OT		SW SRTS	\$0.00	\$750,000.00	\$750,000.00	Add a new project, using IJIA flexible funds allocated to the Safe Routes to School program.
	6	Safe Routes to School Quick Build Signs and Lines				PL & OT		SW SRTS	\$0.00	\$100,000.00	\$100,000.00	Add a new project, using IJIA flexible funds allocated to the Safe Routes to School program. \$50K for a PL phase and \$50K for an OTH phase for ODOT HQ to perform planning activities and purchase equipment for future quick build signs and lines projects to be delivered by local agencies.
	6	Culvert Repair Mitigation				OT		HB2017 Culvert	\$0.00	\$4,410,000.00	\$4,410,000.00	Add a new project. These are state funds to be transferred to ODFW per the ODFW-ODOT Culvert Repair Programmatic Agreement (CRPA).
									\$269,890,414.00	\$423,005,139.76	\$153,114,725.76	

### Applying Climate Lens to the 2022 Annual STIP Adjustment

In accordance with Governor Brown's Executive Order on Climate (EO 20-04), the ODOT Climate Office reviewed the 2022 STIP adjustments (May 2022 and July 2022 Annual) using the climate lens. This document provides high-level observations from that analysis. The annual adjustment contains amendments to nearly 80 existing and new projects that will be added to the 21-24 STIP.

### Scope of Analysis

The analysis observations below are based on the Climate Office review of this limited subset of projects, not the full 2021-2024 STIP. The May 2022 Adjustment (with primarily Infrastructure Investment and Jobs Act (IIJA) funds) and the July Annual STIP amendments are 17% of the 21-24 STIP funding representing \$211M in new funds added to a \$426M base for these projects. These funding decisions were assessed for whether their impact would be positive, neutral, or challenging towards ODOT's climate goals. A majority of project adjustments address increasing costs due to inflationary pressures. An additional set are newly scoped project features, including \$47M in new projects.



### Process

Staff assessed each project using 23 identified project attributes that tie to seven priority outcome areas (listed below) and assigned a dollar value to each based on its portion of the total project.

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

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

This process informs and monitors STIP decisions as the climate lens was applied to the 24-27 STIP and March 2022 primarily Infrastructure Investment and Jobs Act (IIJA) funding allocation decisions, using the 2021-24 STIP as a baseline. Some variability from year to year is expected based on project timing changes.



## **Results: Key Climate Observations**

The 2022 STIP adjustments will result in a net increase of \$211 million programmed project funding: \$59M in May, \$152M in July once approved. The rough return on investment calculation, based on projected outcomes and co-benefits anticipated, shows that these investments will generate \$454 million of new benefits when we look at co-benefits across outcome areas: \$93M in May, \$361 in July. The May projects show a smaller net return, as some of the projects' benefits are offset by investments that may contribute to more emissions.



### **Climate Adaptation/Resilience**

Climate Adaptation/Resilience will see 12% of \$454M projected new benefits.

These include investments in bridges and culverts in nearly all regions, including a fish passage structure with greater environmental and resilience outcomes over a standard culvert in the same location.

Later in 2022, a new Climate Hazard Mapping system will increase the agency's ability to identify priority locations for climate resiliency projects.



### **Climate Greenhouse Gas Emissions Reduction/Mitigation**

GHG Emissions Reduction/Mitigation will see 6% of \$454M projected new benefits.

Several projects improve high priority Active Transportation Needs Inventory (ATNI) corridor segments for bicycling and ADA usage, and benefit areas with high equity populations.

These gains are offset by nearly \$40M in additional funding for six larger roadway enhancement projects.

# Memo

**Date:** August 26, 2022

**To:** TPAC and Interested Parties

**From:** Dan Kaempff, Principal Transportation Planner

**Subject:** Recommendation to JPACT for Regional Flexible Fund Step 2 projects

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## Introduction

Following input gathered at the August TPAC and JPACT meetings, staff have prepared a draft recommendation for TPAC consideration and action for the 2025-2027 Regional Flexible Funds Allocation Step 2 project list to JPACT.

This recommendation was developed taking into account all the various sources of information and input gathered through the nine-month process of project solicitation and evaluation. It is a funding package striking a balance between achieving both regional outcomes and local priorities. It focuses on improving Equity and Safety outcomes and funds the top two RFFA projects as identified by coordinating committees as the most important for that part of the region.

During the August discussions at TPAC and JPACT, there were differing points of view among members regarding how the overall funding package should be developed as well as their preferences for either Example 2 or 3 of the examples prepared by staff. Based on input from TPAC and JPACT members as well as prioritization from coordinating committees, staff has developed their recommendation based on Example 2.

## Investing throughout the region

The idea was expressed at JPACT that RFFA funding should be allocated in a manner that takes into account population, the number of applications or dollar amounts requested, or the specific needs of a sub-region with the goal of the funding being fairly invested in the region. While the desire for funding to be distributed in a manner considered to be fair is understandable, there is no federal or regional policy direction which defines a fair method of distribution or indicates fairness is a consideration in the RFFA funding decision. Federal regulations are clear that the transportation dollars allocated to Metropolitan Planning Organizations (MPO) are to be awarded through a competitive process. Allocating these funds in a formulaic manner such as population is not permitted. The RFFA Program Direction states that these funds should be used to make investments throughout the region, but also cautions specifically against using a formula or establishing funding targets to do so.

Either of the two staff-developed funding options fulfills the RFFA Program Direction funding objective to invest throughout the region. The Excel workbook accompanying this staff report summarizes how the funding is distributed throughout the region to illustrate that this objective is met.

### Recommendation options

The staff recommendation is based on Example 2 as presented in the August TPAC and JPACT discussions. This example funded the top two priority projects in each sub-region and then funded additional projects based on their combined Equity and Safety ratings until there were insufficient dollars remaining to fully fund the next project on the list. This resulted in nine projects being funded at their full requested amounts. There was \$1.46 million shown in Example 2 as unallocated funding, providing TPAC and JPACT with the opportunity to consider different investment approaches.

The staff recommendation adds one additional project – Fanno Creek Trail – to the Example 2 funding package. This package total is slightly over the \$47.3 million funding forecast, but the difference can be accommodated through adjustments in the MTIP programming schedule.

<b>RFFA Staff Recommendation</b>				
<b>Project</b>	<b>Applicant</b>	<b>Sub-region</b>	<b>Phases funded</b>	<b>Funding award</b>
162nd Ave	Gresham	Mult	Const	\$7,575,882
148th Ave	PBOT	Port	Const	\$7,100,335
I-205 Multi-use-path	Clackamas Co	Clac	Plan/PD	\$1,094,858
Council Creek Trail	Washington Co	Wash	Const	\$5,511,000
57th Ave-Cully Blvd	PBOT	Port	Const	\$7,643,201
Sandy Blvd	Multnomah Co	Mult	Const	\$6,500,000
Willamette Falls Dr	West Linn	Clac	Const	\$3,497,580
NP Greenway (Columbia Blvd to Cathedral Pk)	PPR	Port	Const	\$4,860,647
Beaverton Creek Trail	THPRD	Wash	Const	\$2,055,647
Fanno Creek Trail	Tigard	Wash	Plan/PD	\$1,606,705
		<b>Total funded:</b>		<b>\$47,445,855</b>

### Parks Bond staff recommendation

As presented in the August TPAC and JPACT meetings, the table below illustrates projects included in the staff recommendation to Metro Council for funding through the 2019 Metro Parks and Nature bond measure dedicated to trails projects. This staff recommendation results in funding 14 of the 15 trails projects requesting either Parks Bond or RFFA funding. The Tigard-Lake Oswego Trail project is not included in the Parks Bond recommendation but may receive funding depending on the outcome of the RFFA project selection process.

TPAC and JPACT do not have a formal role in allocation of these funds. As the Parks Bond project solicitation and evaluation was conducted as part of the RFFA processes this recommendation is provided for information purposes only.

<b>Parks Bond Staff Recommendation</b>				
<b>Project</b>	<b>Applicant</b>	<b>Sub-region</b>	<b>Phases funded</b>	<b>Funding award</b>
Gresham-Fairview Trail	Gresham	Mult	Const	\$4,232,979
Trolley Trail	NCPRD	Clac	Const	\$651,750
Westside Trail Bridge	THPRD	Wash	Plan/PD	\$1,907,500
Marine Dr Trail	PPR	Port	Const	\$2,261,645
Sandy River Greenway	Troutdale	Mult	Const	\$1,945,800
Clackamas River Trail	Happy Valley	Clac	Const	\$666,175
Scott Creek Trail	Happy Valley	Clac	Plan/PD	\$89,562
Emerald Necklace Trail	Forest Grove	Wash	Plan/PD	\$200,000
Brookwood Pedestrian Overpass	Hillsboro	Wash	Plan/PD	\$1,000,000
NP Greenway (Kelley Pt Pk to Columbia Slough)	PPR	Port	Const	\$1,881,008
Cornfoot Rd	PBOT	Port	Const	\$4,900,000
Westside Trail: Seg 1	King City	Wash	Plan/PD	\$210,000
		<b>Total funded:</b>		<b>\$19,946,419</b>

### TPAC action on recommendation to JPACT

Staff is requesting TPAC to consider this RFFA funding package recommendation, as well as additional information which may be provided subsequent to this memo and associated materials, as a basis for their recommendation to JPACT. At the September 2 meeting TPAC will be requested to take action to recommend a RFFA project package to JPACT.

2025-2027 RFFA staff recommendation

Project	Applicant	Subregion	Fund Source	Phases funded	Requested amount	Funded amount	Equity  Safety	Equity	Safety	Climate	Con. Rel.	Trails	Overall	Risk Assessment		Public Comment		CCC Priority	Previous RFFA?	Additional Information
														Rating	Archaeological Probability	Responses (avg. 75)	Avg rating (avg. 4.47)			
Parks Bond projects (staff recommendation to Metro Council)																				
NP Greenway (Columbia Bl to Cathedral Pk)	PPR	Port	Either	Const	\$ 4,860,647	funded in RFFA	81%	78%	83%	44%	N/A	71%	69%	Med-High	Very High	112	4.80	1	Y	Completes section of regional trail, adds safer crossing of Columbia Blvd, safer on-street connections, improves access to town center, natural areas and parks.
Gresh-Fairview Trail	Gresham	Mult	Bond	Const	\$ 4,232,979	\$ 4,232,979	73%	67%	79%	56%	N/A	65%	67%	Low	High	80	4.65	1		Adds safe AT improvements on high crash street. Continuation northward of regional trail
Trolley Trail	NCPRD	Clac	Bond	Const	\$ 651,750	\$ 651,750	69%	67%	71%	56%	N/A	88%	70%	Med-Low	Very High	168	4.67	1	Y	Improves deficiencies to heavily used section of existing regional trail, access to park and river
Westside Trail Bridge	THPRD	Wash	Bond	Plan/PD	\$ 1,907,500	\$ 1,907,500	80%	89%	71%	33%	N/A	76%	67%	Med-High	Low	139	4.76	-		Planning and project development of trail crossing of US 26. Improves access to high school, employment, recreation sites
Marine Dr Trail	PPR	Port	Either	Const	\$ 2,261,645	\$ 2,261,645	63%	56%	71%	56%	N/A	59%	60%	Med-Low	High	71	4.62	2	Y	Fills gap of regional trail between I-205 & 122nd. Replaces narrow bike lanes on high crash street, heavy truck traffic
Sandy River Greenway	Troutdale	Mult	Bond	Const	\$ 1,945,800	\$ 1,945,800	44%	22%	67%	44%	N/A	47%	45%	Med-Low	Mod-High	214	4.84	2		Regional trail connection between town center, transit and industrial area. Connects to state trail, add safe crossing of rail line, improves access to nature, parks
Clackamas River Trail	Happy Valley	Clac	Bond	Const	\$ 666,175	\$ 666,175	38%	33%	42%	11%	N/A	29%	29%	High	Moderate	59	4.58	2		MUP along section of Clackamas River, part of series of improvements and natural area
Council Ck Trail	Washington Co	Wash	Either	Const	\$ 5,511,000	funded in RFFA	79%	67%	92%	67%	N/A	82%	77%	Medium	Mod-High	56	4.45	-	Y	Improves 20 street crossings of regional trail. Creates safe AT route parallel to high crash road (OR 8).
Scott Creek Trail	Happy Valley	Clac	Bond	Plan/PD	\$ 89,562	\$ 89,562	79%	78%	79%	44%	N/A	47%	62%	Med-High	Moderate	39	4.64	3		Creates off street trail option to 117th, safer crossing of Sunnyside Rd, connection between parks
Tigard-LO Trail	Tigard	Wash	Either	Plan/PD	\$ 245,000		69%	67%	71%	56%	N/A	82%	69%	Med-Low	High	90	4.48	-		Planning for potential regional trail connection through I-5 & OR 217 interchange. Will connect to bike/ped crossing of I-5
Emerald Necklace Trail	Forest Grove	Wash	Either	Plan/PD	\$ 200,000	\$ 200,000	59%	56%	63%	33%	N/A	53%	51%	Med-High	Mod-High	47	4.62	-		Connector to other trails in regional and state networks. May potentially receive \$2.24 million federal funding award in July
Brookwood Ped Overpass	Hillsboro	Wash	Either	Plan/PD	\$ 4,500,000	\$ 1,000,000	58%	44%	71%	33%	N/A	71%	55%	High	Mod-High	20	4.15	-		Bridge over parkway as portion of Crescent Greenway. Connect to future employment area, link to section of trail being constructed in 2022
NP Greenway (Kelley to Slough)	PPR	Port	Either	Const	\$ 3,483,699	\$ 1,881,008	57%	56%	58%	44%	N/A	56%	54%	Low	Very High	92	4.68	3		Completes section of regional trail, adds safer crossing of Marine Drive, connections to other regional trails, improves access to nature, water
Cornfoot Rd	PBOT	Port	Either	Const	\$ 5,225,500	\$ 4,900,000	51%	56%	46%	44%	N/A	59%	51%	Medium	High	35	4.66	4		Connects EFA with employment area, improves freight route, builds section of regional trail
Westside Trail: Seg 1	King City	Wash	Bond	Plan/PD	\$ 210,000	\$ 210,000	47%	44%	50%	22%	N/A	56%	43%	High	Mod-High	13	4.08	-	Y	Planning for section of regional trail network. Creates safer AT access to park and recreation opportunities
Legend:											Ratings legend:									
Project is funded through Parks Bond											BEST									
Project is funded through RFFA											BETTER									
Project is not funded through either source											GOOD									
RFFA projects																				
162nd Ave	Gresham	Mult	RFFA	Const	\$ 7,575,882	\$ 7,575,882	92%	100%	83%	67%	79%	N/A	82%	Med-Low	Moderate	43	4.40	1		Adds bike lanes, sidewalks, lighting safe crossings to major N/S arterial on Gresham/Portland boundary. Improves AT gap in network, access to school, transit
148th Ave	PBOT	Port	RFFA	Const	\$ 7,100,335	\$ 7,100,335	76%	89%	63%	67%	54%	N/A	68%	Low	Moderate	36	3.72	1	Y	Adds protected bike lanes, sidewalks, lighting safe crossings to major N/S arterial in E Portland. Improves access to MAX
I-205 MUP	Clackamas Co	Clac	RFFA	Plan/PD	\$ 1,094,858	\$ 1,094,858	74%	78%	71%	56%	71%	N/A	69%	Low	Moderate	60	4.28	1		Design for section of regional MUP which is currently on-street
Council Ck Trail	Washington Co	Wash	Either	Const	\$ 5,511,000	\$ 5,511,000	79%	67%	92%	67%	79%	N/A	76%	Medium	Mod-High	56	4.45	-	Y	Improves 20 street crossings of regional trail. Creates safe AT route parallel to high crash road (OR 8).
57th Ave-Cully Blvd	PBOT	Port	RFFA	Const	\$ 7,643,201	\$ 7,643,201	65%	67%	63%	67%	71%	N/A	67%	Low	Mod-High	23	4.43	2	Y	Continues previous phases of protected bike and pedestrian facilities S of Prescott. Adds safer crossings, access to grocery, pharmacy, transit
Sandy Blvd	Multnomah Co	Mult	RFFA	Const	\$ 6,500,000	\$ 6,500,000	53%	44%	63%	67%	79%	N/A	63%	Medium	High	38	4.68	2	Y	Serves low-income housing, improves transit access, connections to employment, extends previous RFFA funded improvements eastward
Willamette Falls Dr	West Linn	Clac	RFFA	Const	\$ 3,497,580	\$ 3,497,580	48%	33%	63%	56%	54%	N/A	51%	Med-Low	High	138	4.30	2		Parallels I-205, improves safety and transit access on street likely to see increased traffic due to tolling
NP Greenway (Columbia Bl to Cathedral Pk)	PPR	Port	Either	Const	\$ 4,860,647	\$ 4,860,647	81%	78%	83%	44%	79%	N/A	71%	Low	Very High	112	4.80	3	Y	Completes section of regional trail, adds safer crossing of Columbia Blvd, safer on-street connections, improves access to town center, natural areas and parks.
Beaverton Creek Trail	THPRD	Wash	RFFA	Const	\$ 2,055,647	\$ 2,055,647	74%	78%	71%	56%	79%	N/A	71%	High	High	46	4.65	-	Y	Replaces on-street sections of regional trail. Improves access to MAX, bus lines. Connects to Westside Trail
Fanno Creek Trail	Tigard	Wash	RFFA	Plan/PD	\$ 1,606,705	\$ 1,606,705	74%	89%	58%	56%	54%	N/A	64%	Low	Mod-High	262	4.71	-	Y	Planning and design options for 3/5 of final section of regional trail. Technically challenging area. Improves access to schools
MLK Blvd	PBOT	Port	RFFA	Const	\$ 5,532,955		70%	78%	63%	78%	88%	N/A	76%	Low	Moderate	50	4.60	4	Y	Continues previous phases of crossing, intersection improvements
Tigard-LO Trail	Tigard	Wash	Either	Plan/PD	\$ 245,000		69%	67%	71%	56%	79%	N/A	68%	Med-Low	High	90	4.48	-		Planning for potential regional trail connection through I-5 & OR 217 interchange. Will connect to bike/ped crossing of I-5
Marine Dr Trail	PPR	Port	Either	Const	\$ 2,899,104	funded in Parks Bond	63%	56%	71%	56%	79%	N/A	65%	Med-Low	High	71	4.62	2	Y	Fills gap of regional trail between I-205 & 122nd. Replaces narrow bike lanes on high crash street, heavy truck traffic
7th Ave	PBOT	Port	RFFA	Const	\$ 10,692,227		63%	56%	71%	67%	79%	N/A	68%	Low	High	88	4.43	5		Upgrades existing AT infrastructure in high traffic corridor. Protected bike lanes, upgraded signals, parallels freight route
Emerald Necklace Trail	Forest Grove	Wash	Either	Plan/PD	\$ 200,000	funded in Parks Bond	59%	56%	63%	33%	54%	N/A	51%	Med-High	Mod-High	47	4.62	-		Connector to other trails in regional and state networks. May potentially receive \$2.24 million federal funding award in July
Allen Blvd	Beaverton	Wash	RFFA	Plan/PD	\$ 723,670		58%	67%	50%	67%	79%	N/A	66%	Low	Mod-High	38	4.39	-		Planning and design options for safety improvements on high-volume street in EFA
Brookwood Ped Overpass	Hillsboro	Wash	Either	Plan/PD	\$ 4,500,000	part funded in Parks Bond	58%	44%	71%	33%	67%	N/A	54%	High	Mod-High	20	4.15	-		Bridge over parkway as portion of Crescent Greenway. Connect to future employment area, link to section of trail being constructed in 2022
Troutdale Rd	Multnomah Co	Mult	RFFA	Plan/PD	\$ 1,720,000		57%	56%	58%	44%	50%	N/A	52%	Low	Mod-High	45	4.49	-		Planning and design options for 3/5 of final section of regional trail. Technically challenging area. Improves access to schools
Taylors Fy Rd	PBOT	Port	RFFA	Const	\$ 10,124,236		57%	56%	58%	56%	67%	N/A	59%	Med-High	Mod-High	66	4.94	6		Improves access to transit, adds AT infrastructure, improves crossings. Design options limited due to geographical, environmental constraints
NP Greenway (Kelley to Slough)	PPR	Port	Either	Const	\$ 4,465,605	part funded in Parks Bond	57%	56%	58%	44%	54%	N/A	53%	Low	Very High	92	4.68	-		Completes section of regional trail, adds safer crossing of Marine Drive, connections to other regional trails, improves access to nature, water
Cornfoot Rd	PBOT	Port	Either	Const	\$ 6,698,345	part funded in Parks Bond	51%	56%	46%	44%	83%	N/A	57%	Medium	High	35	4.66	7		Connects EFA with employment area, improves freight route, builds section of regional trail
Lakeview Blvd	Lake Oswego	Clac	RFFA	Plan/PD	\$ 450,036		40%	67%	13%	56%	13%	N/A	37%	Med-Low	Mod-High	18	3.06	3		Planning and design options for street bordering residential and industrial zones
Legend:											Ratings legend:									
Project is funded through RFFA											BEST									
Project is funded through Parks Bond											BETTER									
Project is not funded through either source											GOOD									

	projs requested	funding requested	% of regional funding requested (\$67.3M avail.)	projects funded	amount awarded	% of requested projects funded	% of regional funding awarded	project phases funded	
								Planning/PD	Const
Clackamas County	6	\$ 6,449,961	10%	5	\$ 5,999,925	83%	9%	2	3
Multnomah County	5	\$ 21,974,661	33%	4	\$ 20,254,661	80%	30%	0	4
Portland	9	\$ 60,016,655	89%	6	\$ 28,646,836	67%	43%	0	6
Washington County	9	\$ 16,959,522	25%	7	\$ 12,490,852	78%	19%	5	2
totals		\$ 105,400,799		22	\$ 67,392,274		100%	7	15

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: August 26, 2022  
To: Transportation Policy Alternatives Committee (TPAC) and interested parties  
From: Kim Ellis, AICP, RTP Project Manager  
Subject: 2023 Regional Transportation Plan (RTP) – Proposed 2023 RTP Vision and Goals

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## PURPOSE

The purpose of this memo is to seek TPAC feedback on proposed vision and goals for the 2023 Regional Transportation Plan (*See **Attachment 1** for a summary of the proposed RTP vision and goals*).

The proposed vision and goals reflect feedback received during the scoping phase of the RTP update through stakeholder interviews and an on-line survey and subsequent feedback received during subsequent engagement activities and discussions of TPAC, the Metro Technical Advisory Committee (MTAC), the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Council, including a joint workshop of JPACT and the Metro Council on June 30, 2022.

## BACKGROUND

A major update to the [Regional Transportation Plan](#) (RTP) is underway. The plan is a tool that guides investments in all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and freight throughout greater Portland. The RTP is a key tool for implementing the [2040 Growth Plan](#) and [Climate Smart Strategy](#) and connecting people to their jobs, families, school and other important destinations in the region. The current RTP establishes four overarching priorities – equity, safety, climate and mobility – and eleven goals and supporting objectives, performance targets and policies that together guide planning and investment priorities to meet current and future needs of our growing and changing region.

Previous public and stakeholder input received during the scoping phase and during the first phase of the update showed strong support for the vision, all of the RTP goals and the four overarching priorities – equity, climate safety and mobility. During the scoping phase, TPAC and JPACT requested additional discussion of the adopted 2018 RTP vision and goals to consider ways to provide further focus on the priorities to address through the 2023 RTP update and the role of the RTP in supporting the region's economic vitality.

The proposed vision and goals have been further focused and consolidated to address feedback from JPACT and the Metro Council on June 30 following these principles:

- Honor prior public feedback
- Tailor the vision and goals to our region
- Avoid redundancy
- Provide more focus by reducing the number of goals (to 4 or 5)
- Focus on what the RTP can measurably address

A summary of the joint workshop is provided in **Attachment 2**. The summary also includes the existing 2018 RTP vision and goals for reference.

Below are questions Metro staff would like TPAC when providing feedback on the proposed 2023 RTP vision and goals:

1. Do you have suggestions for ways to improve the revised vision? Is anything important missing?
2. Do you have suggestions for ways to improve the consolidated the goals? Is anything important missing?

#### **NEXT STEPS**

JPACT and Metro Council will also discuss the proposed revisions to the RTP vision and goals in September. TPAC feedback on the proposed changes to the vision and goals will be shared with JPACT and the Metro Council for consideration in their discussions.

Pending JPACT and Metro Council support for the 2023 RTP vision and goals, Metro staff will begin updating and consolidating the objectives to align with the updated vision and goals.

For more information about this request or questions, please contact Kim Ellis at [kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov).

#### **ATTACHMENTS**

- **Attachment 1** – 2023 Regional Transportation Plan – Proposed Vision and Goals
- **Attachment 2** - JPACT and Metro Council RTP Workshop 1 Summary Report

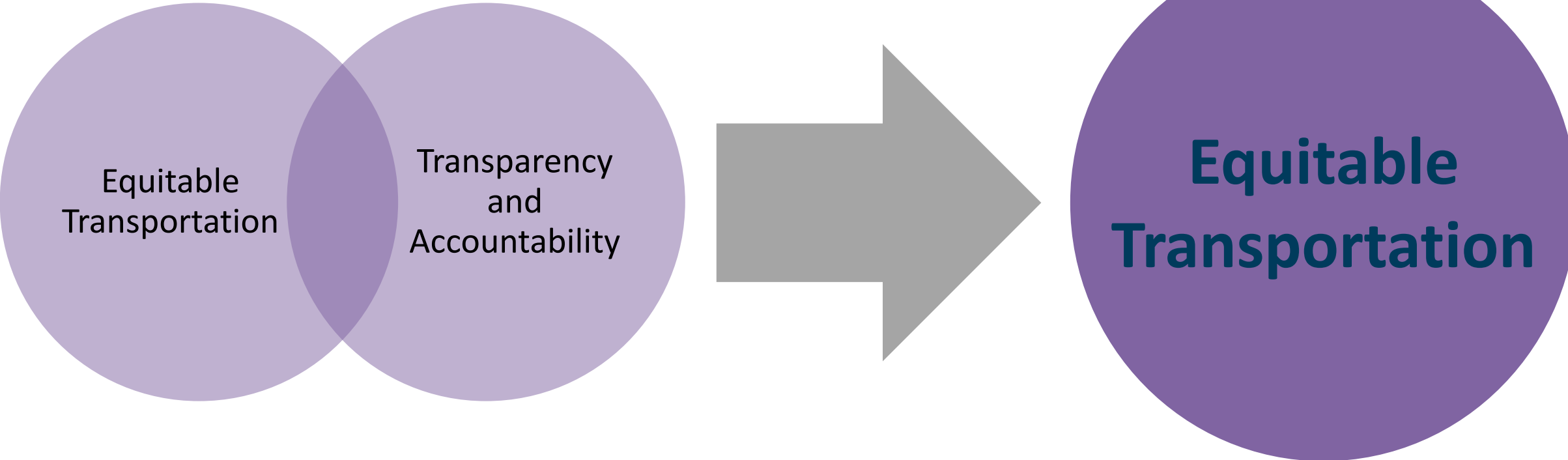
# Draft Vision Statement for 2023 RTP

“Everyone in the greater Portland region will have safe, reliable and affordable travel options that support equitable, resilient, healthy and economically vibrant communities.





## Draft Goal 1



The diagram illustrates the consolidation of two goals into a single one. On the left, two overlapping light purple circles represent 'Equitable Transportation' and 'Transparency and Accountability'. A large grey arrow points from the intersection of these two circles to a single, larger purple circle on the right labeled 'Equitable Transportation'.

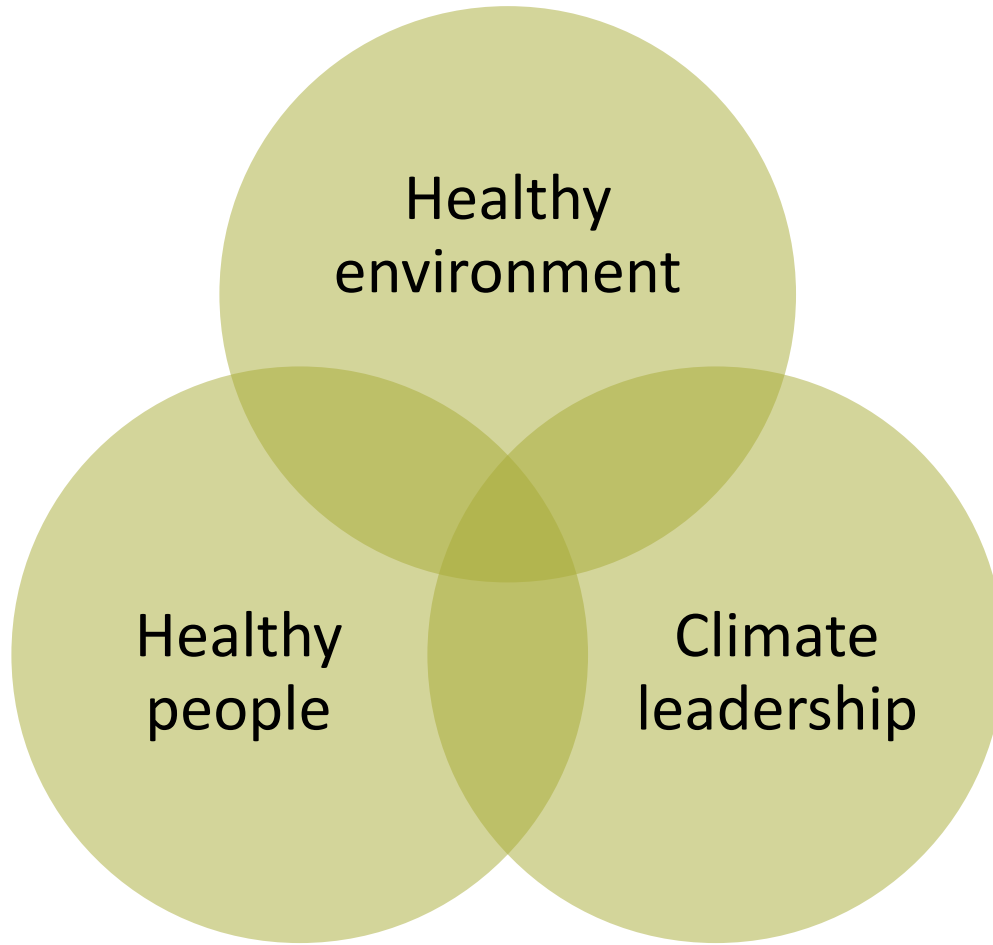
Equitable  
Transportation

Transparency  
and  
Accountability

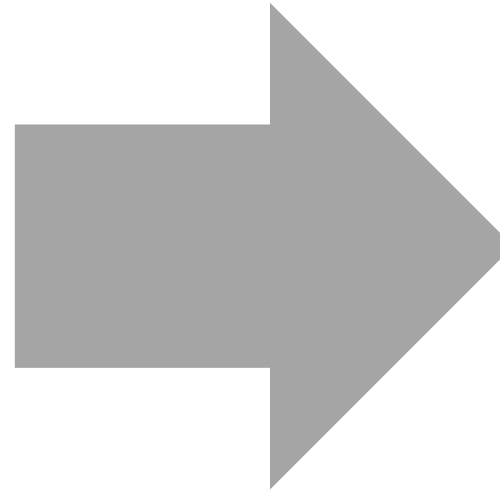
**Equitable  
Transportation**

Consolidates 2018 RTP Goals 9 and 11

*Transportation system disparities experienced by Black, Indigenous and other people of color and people with low incomes, are eliminated.*



Consolidates 2018 RTP Goals 6, 7 and 8



## Draft Goal 2



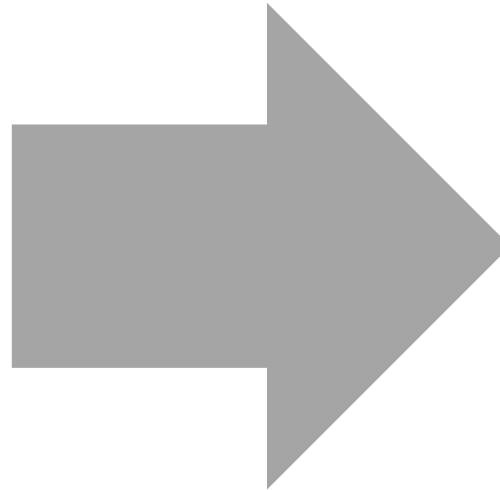
*People, communities and ecosystems are healthy and resilient, carbon emissions and other pollution are reduced and travel by transit, walking and bicycling is increased.*

## Draft Goal 3



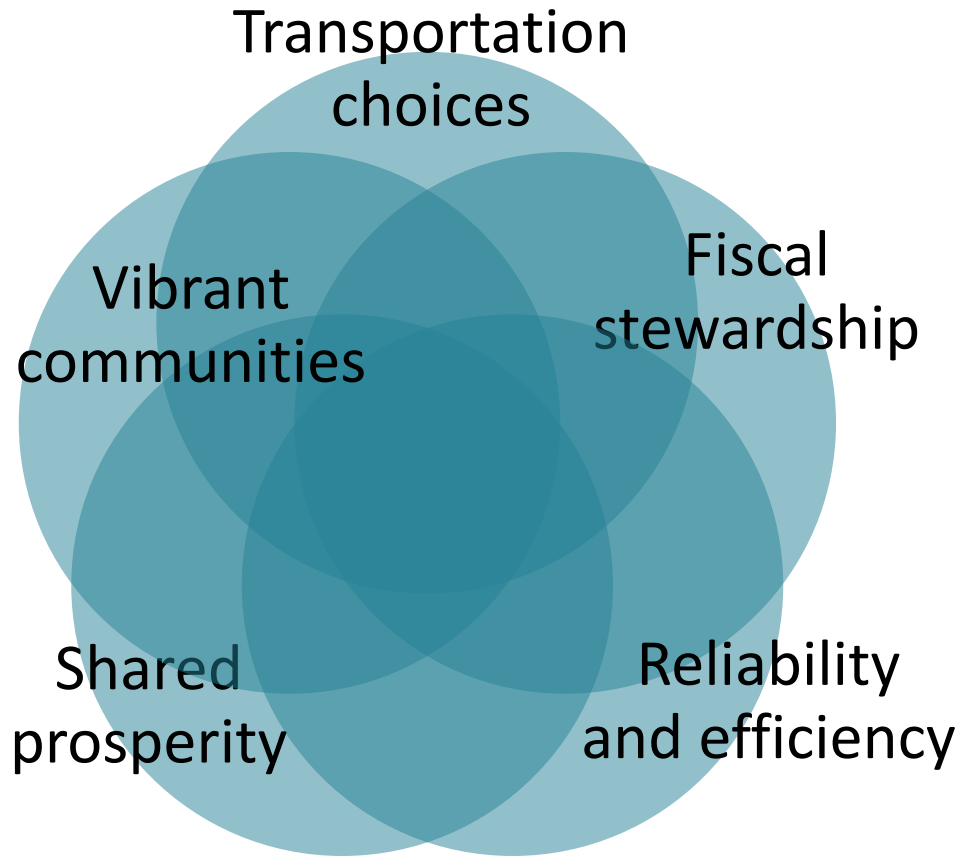
Safety and Security

Revises 2018 RTP Goal 5

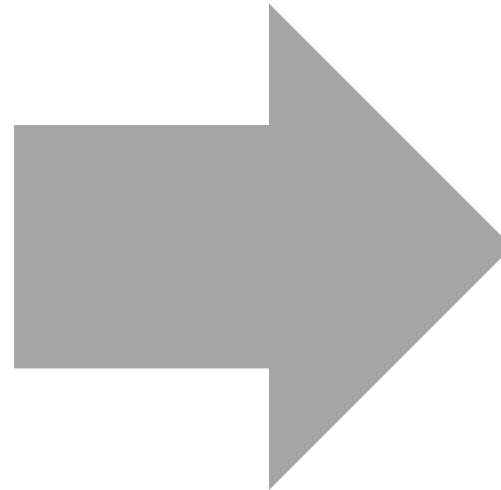


Safe  
System

*Serious crashes are eliminated and people are safe and secure when traveling in the region.*



Consolidates 2018 RTP Goals 1, 2, 3, 4 and 10



## Draft Goal 4



*People and businesses can reach the goods, services and opportunities they need by affordable travel options that are safe, connected, convenient, reliable, accessible, and welcoming for all.*



2023 Regional Transportation Plan update

# JPACT and Metro Council RTP Workshop 1

Updating Our Vision and Goals for the Future  
of Transportation

*A summary of the June 30, 2022 workshop with Council and JPACT,  
which includes a discussion on the 2023 Regional Transportation  
Plan process, vision statement, and goals.*

June 2022



# Meeting minutes

Meeting: JPACT & Metro Council RTP Workshop 1  
Date: Thursday, June 30, 2022  
Time: 7:30 a.m. to 9:30 a.m.  
Place: Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221  
Livestream: <https://www.youtube.com/watch?v=gqjOMBt7tEY&t=0s>  
Purpose: Launch series of workshops with Council and JPACT, discuss 2023 Regional Transportation Plan process, vision statement and goals.  
Outcome(s): Prioritized and consolidated goals for 2023 RTP, refine vision statement.

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## Attendance

### Members present

Councilor Shirley Craddick (JPACT Chair)  
Councilor Christine Lewis (Deputy President)  
Councilor Juan Carlos Gonzalez  
Councilor Mary Nolan  
Councilor Gerritt Rosenthal  
Commissioner Nafisa Fai  
Commissioner Paul Savas  
Chris Warner, Chief of Staff for Commissioner Jo Ann Hardesty  
Mayor Travis Stovall  
Mayor Steve Callaway  
Kathy Hyzy, Milwaukie City Councilor President  
Rian Windsheimer  
Sam Desue  
Mayor Anne McEnerny-Ogle

### Affiliation

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

### Alternates present

Michael Orman

### Affiliation

DEQ

### Members excused

Council President Lynn Peterson  
Councilor Duncan Hwang  
Commissioner Jessica Vega Pederson  
Curtis Robinhold  
Carley Francis  
Commissioner Temple Lentz

### Affiliation

Metro Council  
Metro Council  
Multnomah County  
Port of Portland  
Washington Department of Transportation  
Clark County

### Staff present

Allison Brown  
Camille Pearce

### Affiliation

JLA Public Involvement  
JLA Public Involvement

### Observers present

Chris Ford  
Brendan Finn  
06/30/22

### Affiliation

ODOT  
ODOT

Glen Bolen  
 Mayor Julie Fitzgerald  
 Councilor Baumgardener  
 Tom Markgraf  
 JC Vannatta

ODOT  
 City of Wilsonville  
 City of West Linn  
 TriMet  
 TriMet

## Key Takeaways

Below are the major themes based on the participants' comments and feedback during the workshop:

- Incorporate safety and security as the main priorities
- Need to redefine the term use to describe the geographical area so that it resonates with the people it serves
- Consider how the state can become a global leader in transportation
- Improve the climate action plan and incorporate it more thoroughly into the goals
- Strive to create complete communities
- Reduce number of goals to approximately five, proactive goals

## Welcome & Introductions

Councilor Shirley Craddick (Metro) began the workshop with attendance.

Councilor Christine Lewis (Metro) then gave opening remarks. Current trends suggest people want more from transportation. It shapes our community and every lives. The Regional Transportation Plan (RTP) will act as a blueprint to guide investment in all modes of travel and movement of goods and freight across the region. This document also acts a reference for how we achieve future growth and climate goals. Metro will strive to invite more voices to the table and show how government and community can work together to overcome challenges.



Allison Brown (Facilitator with JLA) then gave an overview of meeting protocols and agenda. The focus of the workshop is to review and update the region's transportation goals and vision statement.

## 2023 RTP: Context and Background

Councilor Craddick gave a brief presentation on the RTP, its history, and the workshop's role. The RTP is a twenty-year plan that is updated every five years. It serves as a tool for local, regional, and state action towards a common vision for the future. This plan includes investment priorities and connects with the climate action plans to achieve the region's climate goals.

The 2018 RTP included extensive engagement, including over 19,000 touch points with residents and key stakeholder groups in the region. The 2023 RTP will continue to build on these extensive engagement efforts with this workshop acting as the initial effort. 2022 is very different than 2018,

## JPACT &amp; METRO COUNCIL RTP WORKSHOP 1

and Metro wants to make sure the vision and goals of the plan fits the region's future and where we are today.

Margi Bradway (Metro) then reviewed the current RTP goals, which this workshop will seek to refine and narrow. She charged the group with thinking about the future with the understanding of what has been done in the past.

**The current RTP goals are:**

- Vibrant communities
- Shared prosperity
- Transportation choices
- Reliability and efficiency
- Safety and security
- Healthy environment
- Healthy people
- Climate leadership
- Equitable transportation
- Fiscal stewardship
- Transparency and accountability



## Small group breakouts

Allison then led the group into the small group exercises. The workshop consisted of four small groups comprised of the following participants:

- Table 1 - Councilor Craddick, Steve Callaway, Sam Desue, Commissioner Paul Savas
- Table 2 - Councilor Lewis, Commissioner Fai, Chris Warner, *Michael Orman*
- Table 3 - Councilor Gonzalez, Councilor Nolan, Rian Windsheimer, *Temple Lentz*
- Table 4 - Councilor Rosenthal, Mayor Anne McEnerny-Ogle, Councilor Kathy Hyzy, Mayor Stovall

## Goals & Priorities

During the first exercise, Allison invited the group to review the current RTP goals and define their top priorities. She encouraged them to consolidate goals whenever possible and consider their reasoning for these conclusions.

One participant asked Allison to clarify if they are aiming to narrow the priorities down to a specific number. Allison responded the groups should do whatever they feel is right, and Margi confirmed.

**Table 1**

This group began their introduction by recognizing





the importance of developing achievable goals. They also stated their main priority is safety and security. The group affirmed their desire for communities and transportation systems to be safe.

**The group defined the following top priorities:**

- A combination of five goals into the first priority - Shared prosperity, transportation choices, reliability and efficiency, and equitable transportation.
- Safety and security.
- Healthy environment and healthy people.
- For the region to be a climate leader.
- Fiscal stewardship.

The group transitioned the goals of vibrant communities and transparency and accountability to the vision statement. They also noted climate action effort needs to be improved and should include reduction in greenhouse gas emissions as well as the impact on future generations.

***Table 2***

This table also recognized safety and security as a main priority. They felt vibrant communities and shared prosperity were more suited for the vision statement and less about outcomes.

***The group defined the following top priorities:***

- Climate and environment
- Equitable
- Reliability and efficiency
- Fiscally transformative

They also noted there is no definition for the best return on investment in terms of fiscal stewardship, which could be a place where we transform the current system. Transparency and accountability have a place within government planning and some application within the regional transportation system.

***Table 3***

This group sought to define five goals that are proactive and help chart a vision for the future. One participant noted the effort should consider land use and finding a balance between transportation and land use choice.

**The group defined the following top priorities:**

- Vibrant and prosperous communities
- Modernization in electrification and safety
- Climate leadership
- Racial equity and equitable transportation
- Themes of good government

***Table 4***

This group focused more on the spirit of the goals and offered several observations. The RTP needs to be forward thinking in terms of using advancing technology as well as recognize the need to put climate and housing first. The focus should be on complete communities and transportation networks. This can be achieved through connecting communities to the level that's necessary, rather than at the same level throughout.

The group includes representatives from Vancouver, Gresham, Milwaukie, and various communities within the Metro region, and these communities have vastly different needs and experiences with the transit system. The region is growing economically, and the built environment plays a critical role in meeting the growing communities' needs. It's important to recognize these communities within the plan.

The transportation system should be resilient as well as reliable, efficient, and attractive. To achieve these things, we need to think about how to efficiently allocate our resources. Transportation options should meet various community needs and directly serve its people.

*"Even though this is a Regional Transportation Plan, our land use does very directly impact all of these things. We're trying to create a system that has the potential to support complete communities."*

*- Kathy Hyzy, City of Milwaukie*

The RTP goals have different implications for the individual experience and the collective experience. The group liked the idea of having five main goals and charged the group with considering how these goals serve the individual, the system, and the intersection between these two. They group also noted that freight was missing in this conversation, clarifying that "goods" is not the same as "freight." They liked table 3's thoughts on adaptability and table 1's idea to reduce redundancy. Lastly, the group encouraged everyone to read the RTP and consider what the future system looks and how we will address the defined goals. The encouraged thinking about the transportation system more broadly as the Portland-Vancouver transportation system.

## Discussion

Allison then asked the group if they had any questions for each other. The following summarizes the questions and comments provided by the workshop participants.

One participant asked the workshop to consider how are these goals going to be used. These goals would be organized differently if they were stated as priorities, pillars, or goals. Margi responded that the RTP includes priorities, plans, and projects, and the goals provide a lens to view all three and have various applications in each circumstance. The participant also wondered whether all projects should meet all the goals or a portion of the goals. Margi noted modeling and analysis are tools Metro uses to look into these details. When they develop a project, they look at the plans within the lens of the RTP as part of the first efforts.



One participant noted the group has defined several values and outcomes but wondered how these will be transformed into goals. Margi noted Metro's process starts with values as part of the process – they are meant to inform rather than define the goals and objectives.

One participant asked how Metro plans to measure performance of the previous RTP and whether this kind of evaluation has helped the region progress in the past. For example, what projects have been completed, did we do the planning in Chapter 8 of the RTP that we said we would do and what needs still exist or have emerged since the last update to the plan. Margi responded that task is a heavy technical lift that happens at the staff level. Metro takes an assessment on what has been accomplished, the current needs, and a network analysis to determine gaps or where we are falling short of where we want to be. This information will help inform updating the 2023 RTP. Another participant asked if the whole system undergoes similar performance measurement, and Margi noted Metro staff are working on a needs analysis of the whole system (that includes identifying gaps) and offered to discuss further offline.

## Vision statement

Allison then led the final small group exercise to discuss the following vision statement and how it can be refined to capture the goals they prioritized.

---

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

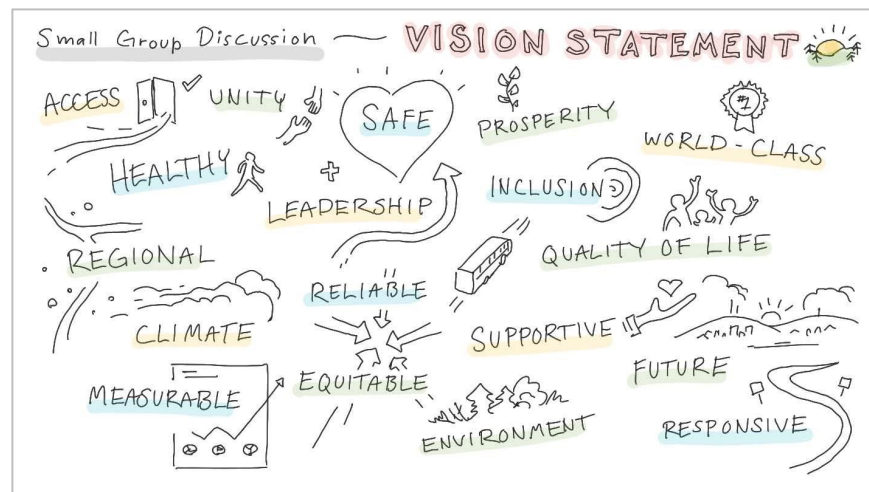
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She asked the group to consider if the current vision reflects the region's priorities and where we are now in 2022. The goal of this exercise is to change, shape, or refine the vision statement.

**Table 1**

This group noted how the goals have changed over the years, but the vision statement has not and therefore needs more clarity. They suggested the following edits:

"In 2040, everyone in the Portland metropolitan region will share in a prosperous, equitable economy and exceptional quality of life sustained by a regionally balanced, reliable, healthy, accessible, affordable, and environmentally responsible transportation system."



The group mused about whether to Vancouver and if they want to be included. Margi affirmed that the federal transportation designation of the Metro area includes Vancouver and their MPO, the Southwest Washington Regional Transportation Council (SW RTC). There is no question they are included in the TMA.

"Our federal designation as a Transportation Management Agency (TMA), which by definition includes [the] City of Vancouver and our colleagues across the river. [...] So they are absolutely included in our vision and they are absolutely included in our goals."

Margi

Councilor Lewis charged the group with better serving the people who don't live in Portland proper and be diligent about including Vancouver and the surrounding areas. Commissioner Fai also noted we have to identify a less technical term for the region. It's a matter of helping people identify with the vision and plan and help them understand it serves them, not just Portland. Allison suggested the need to define a regional term that resonates with the folks it serves could be an indication of where JPACT and the Metro Council would like to go with the workshops.

### Table 2

The group felt the language "Portland metropolitan area" doesn't resonate with many folks they serve so they used the term "region" as a placeholder in their vision statement reiteration. They also felt the vision statement focuses more on the short term rather than long term vision, so they updated the timeframe to 2050 and offered the following suggestion:

"In 2050, everyone in the region will have access to a safe, reliable, healthy, equitable transportation system making it a great place to live, work, and play."

*"We're trying to solve the problem with one tool, but there are two issues there. One is that we have to better serve people who don't live in Portland proper and also acknowledge our neighbors to the north."*

*- Christine Lewis, Metro Council*

### Table 3

This group sought to design a bold, concise vision statement that invites and entices the public to engage with the effort and embrace the efforts of the RTP. It was also noted that the vision isn't just constituents and the public – it is the vision we express to the world.

"The RTP will transform our transportation system by 2040 to sustain a healthy environment where everyone prospers."

The vision should not only be considered at the local, regional, and state level but also within a global context. **How do we define our regional transportation system as a world class infrastructure?** What kind of region do we want to be as we move from a medium to a large size region? How do we elevate our region?

The vision statement is a chance to come together as a unified body and will be an important tool the agencies take to legislature and USDOT.

*"This vision is not only for our constituents and for our plans, [...] I would like for this to be a vision for what we tell the world. There needs to be a global context."*

*- Juan Carlos Gonzalez, Metro Council*

### Table 4

"In 2040, the Portland-Vancouver metro area will have a complete transportation system that prioritizes access to healthy transportation options that meet and exceed the transportation goals."

The RTP is a regional plan and should acknowledge Portland's sister city (Vancouver) within the statement; Safety and healthy environments both capture the nexus of the system and the individual experiences the group spoke of earlier. The vision statement should also tie to specific deliverables and measurable outcomes.

## **Next Steps & Closing**

Allison closed the meeting with an expression of gratitude for the thoughts and perspectives shared from the regional representatives. The team will summarize the feedback and share it with the representatives for their comments. The next workshop will be held in July and continue through the fall.

Councilor Craddick thanked everyone for their time, shared Kim Ellis' contact information, and encouraged those on live stream to provide feedback on the meeting accessibility.



## Appendix A: PowerPoint Slides

**2023 Regional Transportation Plan**

**Shaping our goals and vision for the future of transportation**

JPACT and Metro Council Workshop 1

June 30, 2022

 Metro



**WELCOME**

 **Metro Councilor Shirley Craddick**  
*JPACT Chair*

 **Metro Councilor Christine Lewis**  
*Deputy Metro Council President*

**AGENDA REVIEW**

**Facilitator: Allison Brown**  
*JLA Public Involvement*

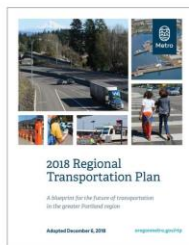
**2023 Regional Transportation Plan Context and background**

**Presenter: Shirley Craddick, Metro Councilor**  
*JPACT Chair*

### What is the Regional Transportation Plan (RTP)?

#### 20+ year transportation plan

- Sets the vision and goals for moving people and goods safely, reliably and affordably for decades to come
- Uses projections of future population and job growth to identify travel needs and solutions through 2045
- Includes policies and projects
- Coordinates local, regional, and state investments on regional system
- Establishes priorities for federal and state funding



5

### The RTP is a key tool for implementing the 2040 Growth Concept and Climate Smart Strategy

**2040 Growth Concept** - regional blueprint for growth  
(and Climate Smart Strategy)  
*Adopted in 1995*



**CLIMATE SMART STRATEGY**  
*Adopted in 2014*

Implemented through adopted community and regional plans



Building toward six desired outcomes

6

## JPACT &amp; METRO COUNCIL RTP WORKSHOP 1

## Inclusive, equitable engagement built the 2018 RTP



7

## Many meaningful opportunities to listen, learn and collaborate



8

## Partnerships and collaboration will continue in this update



9

## 2023 RTP timeline



10

## 2023 Regional Transportation Plan Shaping our goals for the future of transportation

**Presenter: Margi Bradway**  
Metro Planning and Development Deputy Director

## Current RTP goals

WHAT WE WANT TO ACHIEVE	HOW WE GET THERE
1. Vibrant communities	10. Fiscal stewardship
2. Shared prosperity	11. Transparency and accountability
3. Transportation choices	
4. Reliability and efficiency	
5. Safety and security	
6. Healthy environment	
7. Healthy people	
8. Climate leadership	
9. Equitable transportation	

12

*Table discussion 1*

What's missing?

What feels critical to focus on in this moment?

Do you see opportunities to consolidate some goals together?

**Report back  
and group  
discussion**

2023 Regional Transportation Plan

**Shaping our vision  
for the future of  
transportation**

***Facilitator: Allison Brown**  
JLA Public Involvement*

### **Current RTP vision**

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

Vision approved by the Metro Policy Advisory Committee, Joint Policy Advisory Committee on Transportation and the Metro Council in May 2017.

16

*Table discussion 2*

How would you update the vision statement to reflect what's most important and your vision for the future of transportation?

**Report back  
and group  
discussion**





## RTP workshop series for JPACT and the Metro Council

- 1 Vision and Goals For the Future of Transportation  
6/30/22
- 2 Regional Congestion Pricing Policy  
7/28/22
- 3 Safe and Healthy Urban Arterials  
8/25/22
- 4 High Capacity Transit Strategy Update/Future of Transit  
9/29/22
- 5 Climate Smart Strategy Update  
10/27/22

### MARK YOUR CALENDARS!

The workshops for JPACT and the Metro Council will be held from 7:30-9:30 AM.

20

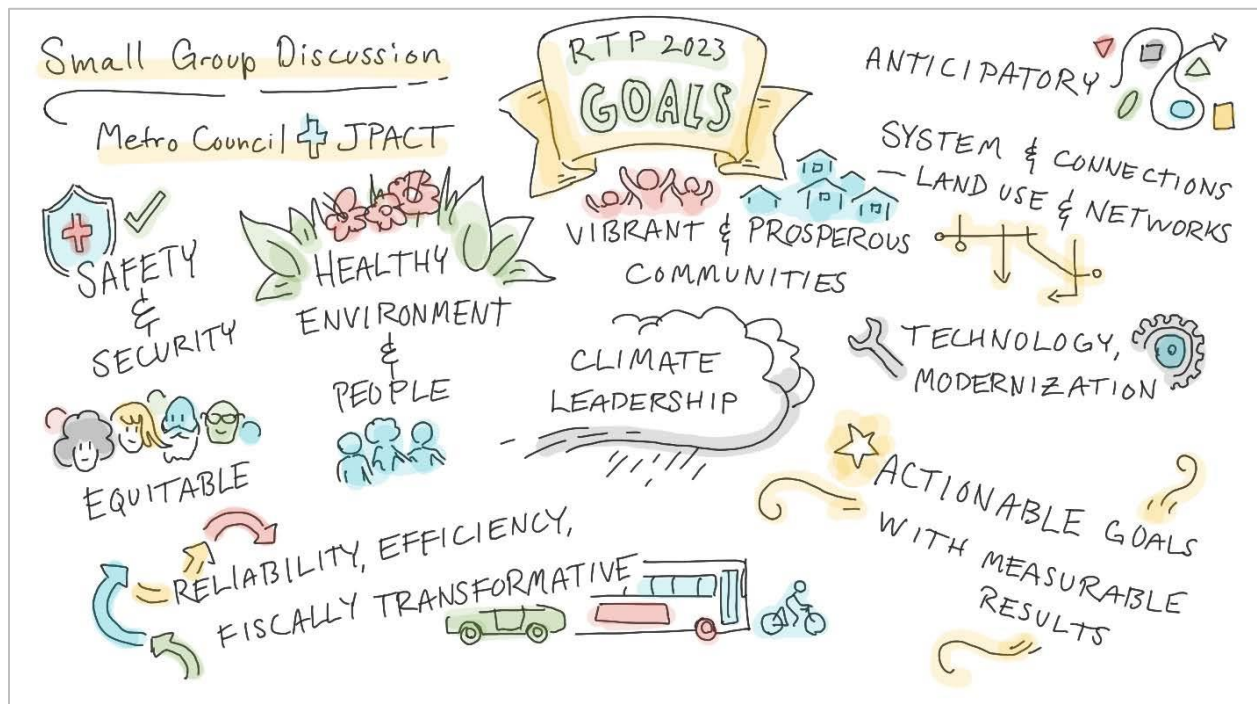
Learn more about the **Regional Transportation Plan** at:



Kim Ellis, AICP  
RTP Project Manager  
[kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov)

[oregonmetro.gov/rtp](http://oregonmetro.gov/rtp)

## Appendix B: Visual Illustrations





## Appendix C: Other Resources

Meeting:	JPACT & Metro Council RTP Workshop 1
Date:	Thursday, June 30, 2022
Time:	7:30 a.m. to 9:30 a.m.
Place:	Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221
Livestream:	<a href="https://youtu.be/r2_ZkCoOU_c">https://youtu.be/r2_ZkCoOU_c</a>
Purpose:	Launch series of workshops with Council and JPACT, discuss 2023 Regional Transportation Plan process, vision statement and goals.
Outcome(s):	Prioritized and consolidated goals for 2023 RTP, refine vision statement.

---

- 7 a.m. Venue opens, optional breakfast.
- Venue setup with 5 small group tables (with assigned seating for participants); food at the back of the room
  - Option for participants to arrive early and mingle
- 7:30 a.m. Welcome & Introductions Councilor Craddick opens the meeting
- Calls the role
  - Invites Councilor Lewis to make opening remarks
  - Councilor Lewis welcomes folks as the Metro Council Deputy President
    - Provides opening remarks
    - Hands back to Allison
  - Allison to introduce herself,
  - Allison to review livestream, group agreements for our discussion, meeting agenda and purpose
- 7:45 a.m. 2023 RTP: Context and Background
- Short presentation on RTP overview by Councilor Craddick (*powerpoint slides*)
  - Staff outlines Goal identified in the 2018 RTP (*powerpoint slides*)
  - Allison facilitated questions/comments from the group (short)
- 8:05 a.m. Small group breakouts: RTP Goals
- Allison to introduce activity: We'll focus first on the RTP goals: these were the concrete things that drove the 2018 update, and were the result of extensive engagement. We recognize that having so many goals (and corresponding objectives) presents some challenges. Our intention in this activity is to choose our top goals for the 2023 update: what is most important to us now? What feels critical to focus on in this moment?
  - Additionally, if you see opportunities to consolidate some goals together, feel free to do so!
  - Allison to explain activity: (*5 mins for explanation, 20 mins in groups, 15 mins report back*) (*turn off table mics when this activity starts*)
    - In table groups, folks to review the 11 goals and select (as a group!) their top 4.
    - Also, groups are invited to consolidate goals

## JPACT &amp; METRO COUNCIL RTP WORKSHOP 1

- We have folks at the table to help facilitate (someone pre-selected who is willing to lightly facilitate): they'll just make sure everyone gets a chance to speak, but also going to fully participate
- Allison is available if any group needs help
- Choose someone to report back to the broader group  
*(turn off table mics when this activity starts)*
- Report back:
  - Each group shares their top 4 goals, and the rationale
  - Make sure this is visible/audible for livestream
  - Opportunity for questions/comments  
*(turn table mics back on when they do report back)*
- Let folks know that Metro staff will be taking these priorities and suggestions and refining the goals, and you'll see them again soon.

8:45 a.m. Small group discussion: Vision statement

- Allison to review vision statement
  - Explain the purpose of vision statement, remind folks of where it came from
- Explain that goal today is to review the vision statement, and make sure it mirrors the goals that we just identified as most important
- Yes, this is a wordsmithing activity! We want you to change those words, their order, or edit the statement to best reflect what's most important, and the vision we want to see in the region.
- Table groups to review statement:
  - Discuss together (10 mins) *(turn off table mics during activity)*
  - Report back where they've landed (15 minutes total)
  - Any additional suggestions/options from large group (5 mins): what did you like? What resonates?

9:15 a.m. Next steps

- Outline what happens next, how feedback from meeting will be used
- Feedback for next time?
- Adjourn (try to let folks go before 9:30 for parking!)

9:25 a.m.

- Councilor Craddick to thank participants and attendees, and adjourn the meeting!





## 2023 REGIONAL TRANSPORTATION PLAN UPDATE

Transportation shapes our communities and our everyday lives. Access to transit, biking and walking connections, and streets and highways where traffic flows allows us to reach our jobs, schools and families. It connects us to the goods and services we depend on and helps keep nature and recreation opportunities within reach. Investment in the transportation system to provide safe, healthy, accessible and reliable options for getting around is important for the region's long-term prosperity and quality of life.

As the federally designated Metropolitan Planning Organization (MPO), Metro is responsible for leading and coordinating updates to the [Regional Transportation Plan](#) every five years. Together, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council serve as the MPO board for the region in a unique partnership that requires joint approval of updates to the plan. The plan was last updated in 2018. The next update is due by Dec. 6, 2023, when the current plan expires.

The greater Portland region is facing urgent challenges. The impacts of climate change, generations of systemic racism, economic inequities and the pandemic have made clear the need for action. Safety, housing affordability, homelessness, and public health and economic disparities have been intensified by the global pandemic. Technology is changing quickly and our roads and bridges are aging.

During 2022 and 2023, Metro will engage local, regional and state partners, business and community leaders and the public to update the RTP through the year 2045. This document provides background about the RTP and timeline for the update.

### WHAT IS THE REGIONAL TRANSPORTATION PLAN?

The RTP is the greater Portland area's long-range plan that guides planning and investments in the region's transportation system for all forms of travel – motor vehicle, transit, biking, and walking – and the movement of goods and freight.

The plan identifies current and future regional transportation needs, investment priorities to meet those needs, and local, regional, state and federal transportation funds the region expects to have available to make those investments. The plan contains:

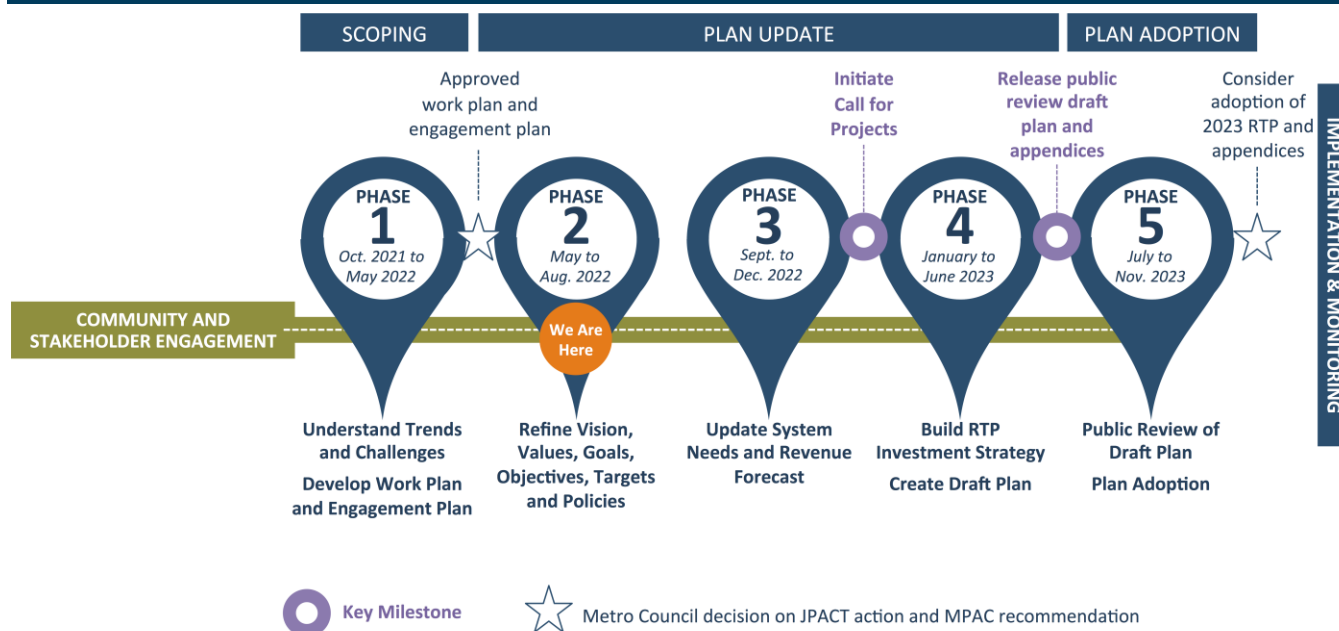
- **a long-term vision** for the region's transportation system;
- **eleven goals and supporting objectives and performance targets** that identify what outcomes the region wants to achieve and indicators to measure progress;
- **policies** that guide decisions and actions in pursuit of our vision and goals;
- **a financial plan** that identifies how the region will pay for investments; and
- **an investment strategy** that includes major local, regional and state transportation investment priorities that address transportation needs and help achieve the vision and goals identified in the plan.

Together these elements guide planning and investment decisions to meet the transportation needs of the people who live, work and travel in greater Portland today and in the future.

Figure 1. Elements of the Regional Transportation Plan



## WHAT IS THE TIMELINE FOR THE UPDATE?



## Scoping

Oct. 2021 to May 2022

- Seek Metro Council, JPACT and MPAC feedback on trends and challenges facing the region and priorities for the update to address.
- Engage local, regional, state and community partners and the public to inform the overall scope of the update and process that will guide the development of the updated plan.

**Decision:** JPACT and the Metro Council approval of work plan and public engagement plan (by Resolution). (April and May 2022)

## Plan Update

May 2022 to June 2023

- **Data and Policy Analysis:** Update vision, goals and policies and document how people travel and performance of the transportation system today by August 2022 to inform regional needs analysis and project list updates.
- **Revenue and Needs Analysis:** Update revenue forecast and complete needs analysis by December 2022 to support updating investment priorities.

**Milestone:** Call For Projects released. (anticipated in January 2023)

- **Investment Priorities:** Update project list priorities, evaluate performance and seek community feedback on updated priorities from Jan. to June 2023.

- **Draft Plan and Investment Strategy:** Prepare public review draft plan and investment strategy.

**Milestone:** Public review draft 2023 RTP and appendices released for 45-day public comment period. (anticipated in July 2023)

## Plan Adoption

July to November 2023

- **~July 1 to Aug. 14, 2023:** 45-day public comment period with hearings, briefings to regional policy and technical advisory committees and county coordinating committees and other stakeholders, and Consultation activities with tribes and state, federal and resource agencies.
- **Sept. and Oct.:** MTAC and TPAC consider public comment and recommendations to MPAC and JPACT.
- **Oct. and Nov.:** MPAC and JPACT consider public comment and recommendations to the Metro Council.
- **Nov. 30:** Metro Council considers final action.

**Decision:** JPACT and the Metro Council consider adoption of the plan (by Ordinance). (anticipated in November 2023)



## 2018 REGIONAL TRANSPORTATION PLAN GOALS (adopted)

Source: 2018 Regional Transportation Plan (Chapter 2)

### GOAL 1: Vibrant Communities

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

### GOAL 2: Shared Prosperity

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

### GOAL 3: Transportation Choices

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

### GOAL 4: Reliability and Efficiency

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

### GOAL 5: Safety and Security

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

### GOAL 6: Healthy Environment

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

### GOAL 7: Healthy People

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

### GOAL 8: Climate Leadership

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

### GOAL 9: Equitable Transportation

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

### GOAL 10: Fiscal Stewardship

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

### GOAL 11: Transparency and Accountability

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



# CURRENT RTP VISION

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

**Vision approved by the Metro Policy Advisory Committee, Joint Policy Advisory Committee on Transportation and the Metro Council in May 2017.**

February 2, 2022



# 2023 Regional Transportation Plan scoping

## Summary of stakeholder interviews

*In December 2021 Metro contracted with JLA Public Involvement to conduct 40 interviews with local, regional, and state public officials and staff, business groups and community-based organizations. The interviews identified issues and ideas that Metro should consider for the 2023 Regional Transportation Plan (RTP).*



### Future Trends

**Stakeholders weighed in on changes they have observed and long-term trends to consider during the RTP process.**

**Uncertainty.** Everything we think we know about transportation is shifting radically and the future is unclear.

**New travel patterns.** Work-from-home has changed the nature of the daily commute. Many people are now traveling at different times of the day and week and are increasingly dependent on freight and home delivery services. Meanwhile, other types of jobs do not offer work-from-home options.

**More driving, more congestion.** More people are buying cars than ever. There is a sense that (given the choice) people will continue to drive because it is the easy choice.

**More danger.** Vehicle and pedestrian fatalities are up. Fear of COVID and violence is affecting how people travel and use public spaces.

**Shifting costs.** Transportation funding is poorly understood and unsustainable. Funding mechanisms will need to evolve and impacts on low-income people will need to be considered.

**Transit.** Transit is seen as essential for reducing congestion, improving transportation equity, and reducing greenhouse gas emissions. Investments and strategies that rebuild ridership will be an important near-term goal.

**Climate.** It will be critical to figure out how to accelerate the transition to electric vehicles and pay for related infrastructure.

**New priorities.** COVID and telework has prompted the “Great Resignation” and people are reevaluating infrastructure priorities. Many have discovered the importance of safe, walkable neighborhoods.

**New technologies.** Considerations should include hybrid work infrastructure, electric and autonomous vehicles, e-bikes and scooters, travel data/information technology, ride-share, and alternative fuels.

### Vision

**Stakeholders provided their feedback on the existing Regional Transportation Plan vision.**

*“Everyone in the Portland metropolitan region will share in a prosperous, equitable economy and exceptional quality of life sustained by a safe, reliable, healthy, and affordable transportation system with travel options.”*

**An ambitious and solid foundation.** The vision Statement still makes sense as an aspirational and ambitious goal for the region’s future. The vision was praised as clearly stated, comprehensive, positive, and consistent with the vision statements of other groups.

Some described the vision as “idealistic” and “utopian” but felt that it was appropriate for a vision to be broad and to aspire to lofty goals. Others felt that the vision may be trying to achieve too much and realizing the vision will depend on factors outside of the transportation system.

**Stakeholder suggested changes to the Vision: consider more emphasis on...**

**Accessibility.** Improved access and affordability should be a primary goal. Transportation access is closely related to concerns about having an equitable system.

**Equity.** The Vision should speak more directly to equity and include specific language that addresses historically marginalized and oppressed communities.

**Climate.** The Vision needs to include more explicit focus on climate and resilience.

**Economic prosperity.** The Vision should reflect how transportation drives the regional economy and supports manufacturing and freight.

**Travel options.** The Vision should be inclusive of all modes of transportation and recognize that different regions have different needs.

**Transit.** Transit is critical to achieving the Vision and will require greater focus to become a safer and more reliable transportation option.

## Priority Areas

**The 2018 RTP prioritized equity, safety, climate, and congestion. Stakeholders discussed whether these priority areas still make sense?**

While all the priorities were seen as important and interrelated, **safety** and **equity** were most consistently rated as higher priorities relative to climate and congestion:

*"The system should be safe, or it is not a good system."*

*"It is important to address disparities with people of color, urban, and rural communities to ensure they are not overlooked."*

## Equity

**Stakeholders provided their thoughts on what makes an equitable process for selecting projects and what an equitable transportation system looks like.**

**An equitable system.** While there was no universal definition, most offered a variation of the following:

*"Equity means that we have a transportation system that serves everyone, regardless of income and geography."*

Most agreed that such a system should be affordable, safe, accessible, convenient, and provide equal opportunity for users. However, the perceptions of who should be the primary beneficiaries of an equitable system varied. Suggested focus included "everyone", "people of color", "underserved areas", and "the most vulnerable users."

**Equitable projects** should focus on improving safety, particularly with regard to last-mile connectivity, improving transit accessibility, and multimodal travel options. Projects should yield objectively beneficial outcomes for specific areas ... not just vague regional benefits.

**Equitable process** should not presuppose outcomes in advance. A truly equitable process should center diverse voices who are closest to the problems and empower them to make their own decisions. Such a process could involve using data to identify underserved areas, going to those places and nurturing relationships with individuals and organizations who are trusted community ambassadors, agreeing on how Metro can support the process, providing information, education, and compensation for time as required, and then standing back to let the people lead.

Throughout, Metro must be a good listener and foster an open, collaborative process that develops a thorough understanding of local needs. At the end, Metro should circle back to let people know they were heard, to build trust and maintain ongoing relationships with the community.

**Critical Partnerships.** Metro has a solid reputation for engaging with community-based organizations (CBOs) and Black, Indigenous and People of Color communities, but some regional cities and business groups have felt left out of recent transportation conversations. Existing relationships with CBOs should not be taken for granted or overused. Partnerships should not be infrequent, only when Metro wants something. Commitment to partnership means being transparent about the role and decision-making power of participants, and not asking for time if it will not make a difference. It also means honoring prior input.

## Hopes

**Stakeholders described what they hope will be different in two years because of the 2023 RTP process?**

**Improved reputation for Metro.**

**Partnerships.** More coordination and better relationships between agencies and communities.

**A better RTP.** The RTP should be an exciting, useful tool that honors diverse voices and lays out a clear plan with metrics for success.

**Visible change.** Demonstrate tangible accomplishments and successes.

**A picture of what's coming.** We must understand the new normal.

**Renewed optimism.** People should feel listened to and are hopeful that solutions are coming.



## 2023 Regional Transportation Plan

# Summary of public survey #1: Vision and goals

*Metro hosted an online public survey from February 14 to April 4, 2022, during the scoping phase of the 2023 Regional Transportation Plan (RTP). The survey collected input from 1,372 participants. This is a high-level summary of the input received on the vision and goals.*

### Vision

**The 2018 RTP vision continues to be aligned with many people's vision for the future of transportation in the greater Portland region.**

**Vision: Everyone in the Portland metropolitan region will share in a prosperous, equitable economy and exceptional quality of life sustained by a safe, reliable, healthy, and affordable transportation system with travel options.**

Most survey respondents (65% people) indicated that the 2018 RTP vision matches their vision for transportation well or very well. Twenty percent (20%) of respondents indicated that the vision does not or does not very well match their vision. The most frequent comments made about the vision were related to:

- **Elevating addressing the climate impacts of transportation** (30 comments)
- **The vision being too vague or all-encompassing to be effective** (26 comments)

### Goals

**People are supportive of the all RTP goals indicating that they remain important goals for the region.<sup>1</sup>**

#### 2023 RTP Goals

1. **Vibrant communities**
2. **Shared prosperity**
3. **Transportation choices**

4. **Reliability and efficiency**
5. **Safety and security**
6. **Healthy environment**
7. **Healthy people**
8. **Climate leadership**
9. **Equitable transportation**

There is especially high support for:

- **Safety and security** (84% of respondents rated important)
- **Healthy environment** (81% of respondents rated important)
- **Vibrant communities** (78% of respondents rated important)

However, most people think **the region is *not* making good progress on achieving the goals.**

**Safety and security are a top concern.** It was the most important goal to the highest number of survey respondents. **The region is also performing the lowest on safety and security, according to survey respondents.** Sixty-nine (69%) of respondents indicated that greater Portland is not doing very well toward meeting this goal.

Most of the more than 100 survey comments about safety and security focused on traffic safety including crashes and driving behavior.

"I think about safety for our kids who have to walk on the sides of the roads because our streets don't have sidewalks, or how I'm forced to use my vehicle out of the safety of my kids because I don't want us to get hit while walking half a mile to our destination."

– Survey participant

<sup>1</sup> The survey did not include the two process goals: fiscal stewardship and transparency and accountability.

These comments most often referred to concerns about **speed, lack of enforcement and the vulnerability of people walking, biking and living near roadways.**

Commenters also voiced concerns about safety on transit and in public spaces related to crime and violence. There were several comments that requested a distinction be made between the security of goods and the safety of people. Respondents also indicated that **the region is not making good progress toward meeting the following goals:**

- **Shared prosperity** (58% indicated that we are not doing very well)
- **Vibrant communities** (58% indicated that we are not doing very well)
- **Climate leadership** (58% indicated that we are not doing very well)
- **Equitable transportation** (56% indicated that we are not doing very well)

Respondents indicated that the **region is doing ok on:**

- **Reliability and efficiency** (52% indicated that we are not doing very well)
- **Transportation choices** (48% indicated that we are not doing very well)
- **Healthy environment** (48% indicated that we are not doing very well)

The survey asked **how transportation in greater Portland equitable could be more equitable.** There were 502 comments. Some of the themes include:

- Affordable transit
- Increase transit accessibility
- Increase transportation choices
- Involve communities experiencing inequities in decision-making
- Equitable funding sources for transportation

Additional analysis of the equity responses is forthcoming.

## Survey participants

The survey was provided in English, Spanish and a screen-reader accessible version. Upcoming 2023 RTP surveys will be bolstered by outreach through community liaisons with the goal of increasing participation in underrepresented communities. Groups that are underrepresented in respondent information by 4 percent or more are indicated **in red.**

**Table 1. County of residence** (1,066 respondents)

County	Survey Percent	2020 Census
Clackamas	17%	19%
Multnomah	58%	47%
Washington	<b>24%</b>	34%
Clark	1%	--
Other	17.1%	

**Table 2. Race/ethnic identity** (1,066 respondents)

Racial or ethnic identity	Survey Percent*	2020 census
American Indian/Native American or Alaska Native	2%	3%
Asian or Asian American	<b>4%</b>	11%
Black or African American	3%	5%
Hispanic, Latino or Spanish origin	<b>5%</b>	14%
Pacific Islander	1%	1%
White	74%	66%
Other	3%	--
An ethnicity not included here	4%	--
Prefer not to answer	12%	--

\* Participants could select as many race/ethnicity identities as applicable. Therefore, the total is greater than 100%.

**Table 3. Income** (1,024 respondents)

Annual household income	Survey Percent*	2020 census
\$10,000 to \$19,999	2%	5%
\$20,000 to \$29,999	<b>2%</b>	6%
\$30,000 to \$39,999	<b>3%</b>	7%
\$40,000 to \$49,999	<b>4%</b>	14%
\$50,000 to \$74,999	<b>7%</b>	17%
\$75,000 to \$99,999	15%	13%
\$100,000 to \$149,999	<b>14%</b>	19%
\$150,000 or more	19%	20%
Don't know/prefer not to answer	19%	--



# Memo

Date: August 26, 2022  
To: Transportation Policy Alternatives Committee (TPAC) and interested parties  
From: Kim Ellis, AICP, RTP Project Manager  
Subject: 2023 RTP Call for Projects – Preliminary Information

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## Purpose

This memo provides preliminary information on the 2023 Regional Transportation Plan (RTP) Call for Projects. This information is being provided to help jurisdictional staff responsible for developing the list of projects for the 2023 RTP begin to prepare.

## Overview

Metro staff will issue a “Call for Projects” in January. Starting in early January 2023, jurisdictions responsible for developing the draft projects lists will have about 6 weeks to:

- work through coordinating committees to finalize their recommended list of RTP project and programs within financially constrained revenue forecast targets;
- update or add new projects (and related project information and modeling details) to the 2023 RTP Project HUB, an online project database;
- submit a completed and signed Form A: Public engagement and non-discrimination certification and documentation; and
- submit a letter of endorsement from their respective governing body (e.g., city council, board or commission) that indicates support for projects being submitted by their staff to the 2023 RTP.

There will be a financially constrained budget that the updated project list will have to fit within and policy direction from the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council on needs and priorities for the 2023 RTP project list to address. Work is underway to update the vision, goals and policies in the RTP, to identify needs and priorities for investment, and to develop the financially constrained revenue forecast for the 2023 RTP. As with past RTP updates, project sponsors will coordinate project list updates across jurisdictions and within the financially constrained budget through county coordinating committees. Metro staff will provide more information about the timeline and process in the next month to help agencies plan ahead and begin preparing for the Call for Projects this fall. Refer to the anticipated timeline provided in **Attachment 1**.

## Project that will be information requested

To help agencies prepare, the following information will be requested for projects and programs submitted by jurisdictional partners during the Call for Projects:

- **Project details** submitted via the 2023 RTP Project Hub, the same platform that was used in the 2018 RTP update. Project information from the 2018 RTP will be carried forward as a starting point. The 2023 RTP Hub project is being updated to minimize the burden on project sponsors, while continuing to collect sufficient project details for the RTP performance assessment and for accountability and transparency. A guidance document is being developed that will provide instructions and information on each of the questions in the RTP Project Hub, including:
  - Project name and description
  - Cost (costs for projects/programs in the 2018 RTP will be updated to 2022 dollars); costs should be reviewed and updated to account for elements such as inflation, materials cost increases, right-of-way acquisition, environmental mitigation, stormwater management, etc. Jurisdictional partners are encouraged to work with appropriate agency staff to update project costs to account for these elements as much as possible.

- Primary project sponsor and project partner(s)
- Location
- Time period
- Constrained list (2023 to 2030 or 2031 to 2045 time periods)
- Strategic list (2031 to 2045 time period)
- Project or program features that provide more details
- Investment category (e.g. capital, maintenance, operations)
- Identification of safety projects
- Details on projects that change roadway capacity or add bicycle facilities (for modeling)
- Source of project/program (e.g. plans, studies, etc.)

Additionally, following the Call for Projects, Metro will conduct a GIS analysis to identify a variety of attributes for each project recommended for the 2023 RTP, including: 2040 land use, regional trail, regional system, high injury corridor, fish and wildlife habitat area and equity focus area.

- **Certification and documentation of public engagement and non-discrimination** will be provided by jurisdictions using Form A (see **Attachment 2**). Form A must be signed and submitted with the list of projects, and provides documentation and a description of the public engagement opportunities that have been provided by project sponsors during the planning and development of projects submitted in the 2023 RTP call for projects as well as the plan(s) a project has been adopted in through a public process with opportunities for input.
- **A letter of endorsement** from the project sponsor's governing body (e.g., city council, board or commission) for all projects submitted. The letter indicates support for the list of projects.

### Preparing for the Call for Projects

Project sponsors can start preparing for the Call for Projects now.

- Confirm with Metro staff who will be responsible for updating information in the RTP Project Hub
- Begin reviewing the 2018 project list to identify potential updates and new projects – an excel spreadsheet of the 2018 RTP project list is available to download at:  
<https://www.oregonmetro.gov/sites/default/files/2022/05/06/2018%20RTP%20Master%20Project%20List%20All%20Projects20220426.xls>
- Schedule time with the governing body that must provide a letter of endorsement
- Begin completing the Form A checklist
- Review draft documents in this memo and guidance documents when they are available
- Contact Metro staff with questions
- Participate in an on-line Metro-hosted training for jurisdictional staff responsible for submitting project information to the RTP Hub. The training will be held in Fall 2022 and will focus on how to access and use the RTP Project Hub to review and submit updated or new project information and modeling details. An announcement and registration details will be sent to jurisdictional staff in September.

### Metro staff contacts about the Call for Projects

- Ally Holmqvist, Senior Transportation Planner at [ally.holmqvist@oregonmetro.gov](mailto:ally.holmqvist@oregonmetro.gov)
- Lake McTighe, Principal Transportation Planner at [Lake.McTighe@oregonmetro.gov](mailto:Lake.McTighe@oregonmetro.gov)

### Attachments

**Attachment 1.** Tentative Schedule and Timeline for Call for Projects and Plan Adoption

**Attachment 2.** Draft Form A: Public engagement and non-discrimination certification and documentation for projects submitted in the 2023 Regional Transportation Plan Call for Projects



## 2023 REGIONAL TRANSPORTATION PLAN

**Tentative**

# Schedule and Timeline for Call for Projects and Plan Adoption

January to November 2023

Jan. 6 to Feb. 17	Cities, counties, ODOT, Port, TriMet and SMART work through technical and policy coordinating committees to finalize list of 2023 RTP project and programs within financially constrained revenue forecast targets developed in 2022
Jan. 6	<b>Call for Projects begins</b> ( <i>6 weeks</i> )
Jan. 27	<b>Deadline</b> for agencies to provide Metro staff with preliminary list of projects and programs anticipated to be submitted for 2023 RTP by time period (e.g., 10-year constrained list, outer years constrained list, strategic list)
Feb. 17	<p><b>Deadline</b> for project lead agencies to update/submit new project information, including modeling details, through on-line RTP Hub</p> <p><b>Deadline</b> for project lead agencies to submit Form A: Public engagement and non-discrimination certification and documentation to Metro staff</p> <p><b>Deadline</b> for project lead agencies to submit a letter of endorsement from their governing body (e.g., city council, board or commission) that indicates support for projects being submitted by their staff to the 2023 RTP</p>
Feb. 21 to 28	Metro reviews submittals for completeness and compiles draft project lists for review by sponsoring agencies
March and April	<p>Metro staff evaluates investment packages and seeks public feedback on draft project list</p> <p>Metro staff prepares draft RTP and appendices</p>
May and June	JPACT and Metro Council discuss results and public input, and provide feedback to Metro staff on finalizing draft plan, projects and appendices for public review
July 1 to Aug. 14	<b>45-day public comment period on draft RTP, project list and appendices</b> (engagement activities will include a public hearing, online comment opportunity and other activities); comment period ends at 5 P.M.



September	MTAC and TPAC discuss public comments and staff recommendations for refinement of draft RTP and project list
	Metro Council, JPACT and MPAC discuss public comments and staff recommendations for refinement of draft RTP and project list
October	MTAC and TPAC consider public comments and make recommendations to MPAC and JPACT, respectively
<b>October 25</b>	<b>MPAC recommendation to the Metro Council</b>
<b>November 16</b>	<b>JPACT considers final action</b>
<b>November 30</b>	<b>Metro Council considers final action</b>



## 2023 REGIONAL TRANSPORTATION PLAN

### Form A. Public engagement and non-discrimination certification and documentation for projects submitted in the 2023 Regional Transportation Plan Call for Projects

#### Purpose

This form provides documentation and a description of the public engagement opportunities that have been provided by project sponsors during the planning and development of projects submitted in the 2023 Regional Transportation Plan (RTP) call for projects. Completion of the form declares that the project sponsors have provided adequate opportunities for public engagement during the development of plans and projects, including identifying and engaging marginalized communities, including people with low income, people with disabilities, people with limited English proficiency, and Black, Indigenous and other people of color.

Metro retains these forms to demonstrate compliance with federal (U.S. Department of Transportation, Federal Highways Administration and Federal Transit Administration) and state (Oregon Department of Transportation) guidance on public engagement and on Title VI of the Civil Rights Act and other civil rights requirements (see [FTA Circular 4702.1B](#) and Code of Federal Regulations [450.210](#) and [450.316](#)). Documentation of the local actions described in this form may be requested by federal or state regulators.<sup>1</sup>

The state also outlines requirements for public engagement in transportation system planning activities by cities and counties in the Oregon Administrative Rules (OAR) as follows:

- OAR [660-012-0120](#): Transportation System Planning Engagement
- OAR [660-012-0125](#): Underserved Populations
- OAR [660-012-0130](#): Decision-making with Underserved Populations
- OAR [660-012-0135](#): Equity Analysis

One (1) Form A must be completed for the list of projects submitted by each project sponsor for the 2023 Regional Transportation Plan. Metro will use the information provided to describe the array of public engagement opportunities that contributed to the development of the 2023 RTP. All or parts of the completed Form A may be included in the 2023 RTP public engagement report.

<sup>1</sup> If such a request is unable to be met, the Regional Transportation Plan itself may be found to be out of compliance, requiring regional corrective action.

#### Overview of Instructions

**1) Complete Form A** for all projects and programs submitted to 2023 RTP.

- **Section A:** Public Engagement Checklist
- **Section B:** Signed Certification Statement
- **Section C:** Documentation of Source(s) of Projects Submitted
- **Section D:** Summary of Engagement (*for NEPA projects only*)

**2) Submit list of projects for 2023 Regional Transportation Plan**

**3) Submit letter of endorsement from your governing body** (e.g., city council, board, commission) for all projects submitted

**4) Ensure records are retained by your agency** in accordance with instructions in this form

For questions, contact Ally Holmqvist, Senior Transportation Planner at [ally.holmqvist@oregonmetro.gov](mailto:ally.holmqvist@oregonmetro.gov)

## Instructions

**By Feb. 17, 2023**, project sponsors must fill out each section of this form and submit the completed form to Metro along with the list of projects submitted to the 2023 RTP and a letter of endorsement from your governing body that indicates support for projects submitted to the 2023 RTP on behalf of the sponsoring jurisdiction. Project sponsors should keep referenced records on file in case of a request for information.

### Section A: Public Engagement Checklist

The checklist in this section outlines federal and state Title VI and engagement requirements for transportation planning and project development. By checking each box, project sponsors are confirming that the submitted projects have met the associated requirements to support Title VI and engagement compliance for the 2023 RTP. The type of records that should be retained are listed where appropriate. These do not need to be submitted to Metro, but must be retained by project sponsors as described above. The completed checklist may be included in the final 2023 RTP public engagement report.

### Section B: Signed Certification Statement

By signing this section, project sponsors certify:

- (1) That projects submitted to the 2023 RTP comply with federal and state Title VI and engagement requirements;
- (2) their commitment to retaining records documenting this compliance; and
- (3) their commitment to conducting future project development processes for projects in the RTP that are compliant with federal and state Title VI and engagement requirements.

### Section C: Documentation of Source(s) of Projects Submitted

In this section, project sponsors provide a list of (1) the adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans or any other such plans or studies that were developed with opportunities for public feedback, in which the submitted projects are included and where additional information on public engagement may be found; and, if needed, (2) information for plans, strategies, etc. that are not yet adopted, but are anticipated to be adopted through a public process prior to the adoption of the 2023 RTP.

### Section D: FOR NEPA PROJECTS ONLY - Summary of non-discriminatory, inclusive engagement for NEPA projects

In this section, project sponsors provide additional information on public engagement elements and activities that illustrate how requirements are being met and best practices that are being utilized for any projects subject to the [National Environmental Policy Act](#) (NEPA). These are typically large-scale, major projects, anywhere from \$100 to 500 million in cost ([CFR 40 1508.18](#)), may be constructed in multiple phases, have a high level of public, legislative or congressional interest and require more extensive public outreach and engagement. Completed summaries may be included in the final 2023 RTP public engagement report.

### **Letter of Endorsement Signed by Governing Body**

A letter of endorsement from your governing body that indicates support for projects submitted to the 2023 RTP must be provided to Metro.

### **Requirements for Retention of Records**

Records should be retained until the related local transportation system plan, subarea plan or strategy, topical plan or strategy, modal plan or strategy, transit service plan or other plan or study is superseded, or the submitted projects have been completed or removed from the RTP plus six years. Retained records do not have to be submitted unless requested by Metro, state regulators or federal regulators.

DRAFT

## Section A. Public Engagement Checklist for Projects Submitted

*This checklist outlines federal and state Title VI and engagement requirements for transportation planning and project development. By checking each box, project sponsors are confirming that the submitted projects have met the associated requirements to support engagement compliance for the 2023 RTP.*

**Project Sponsor Agency:** \_\_\_\_\_

**Total number of projects submitted in 2023 RTP Call for Projects:** \_\_\_\_\_

- ☐ All projects submitted in the call for projects are included in one or more of the documents listed in Table 1 in Section C of this form.

**Retained records:** *Copies of all documents listed in Section C.*

**OR**

- ☐ Not all projects submitted in the call for projects are included in one or more of the documents listed in Table 1 in Section C of this form. These projects are listed in Table 2 in Section C of this form.

- ☐ The sponsoring agency or governing body has adopted a Title VI Plan and administrative procedures to implement it in compliance with Federal Title IV of the Civil Rights Act and implementing regulations.
- ☐ Projects submitted for the 2020-30 implementation timeframe have included and documented project-specific public engagement and analyzed potential inequitable impacts for Black, Indigenous and other people of color, people with limited English proficiency and people with low income compared to those for other populations groups.

**Retained records:** *Documentation of public engagement activities.*

- ☐ Projects submitted for the 2031-45 implementation timeframe will include project-specific public engagement and analyze potential inequitable impacts for Black, Indigenous and other people of color, people with limited English proficiency and people with low income compared to those for other population groups.
- ☐ A public engagement plan was developed for each of the plans, strategies, etc., listed in Table 1 of Section C, in compliance with Federal Title IV of the Civil Rights Act of 1964 and implementing regulations and these Oregon Administrative Rules: OAR [660-012-0120](#), [660-](#)

[012-0125](#), [660-012-0130](#), and [660-012-0135](#), including the following (check all that are true):

- ☐ A statement of non-discrimination.
- ☐ Public notices were published and requests for input were sent in advance of the project start, engagement activity or input opportunities.
- ☐ Timely, convenient and accessible forums for public input throughout the process. These forums included accommodations for people with disabilities (e.g., screen reader-compatible materials, ASL interpretation), people with limited English proficiency (e.g., translation) and other accommodations (e.g., hybrid meetings).
- ☐ Interested and affected groups were identified, and contact information maintained, in order to share plan information; updates were provided for key decision points; and opportunities to engage and comment were provided throughout the process.
- ☐ Efforts were made to engage marginalized populations, including Black, Indigenous and other people of color, people with limited English proficiency, people with low income, people with disabilities, older adults and youth. Meetings or events were held at times and locations that are convenient and accessible for marginalized populations with access to transit. Language assistance was provided, as needed, such as translation of key materials, use of a telephone language line service to respond to questions or take input in different languages, and interpretation at meetings or events.
- ☐ During project and/or plan development, a demographic analysis was completed to understand the locations of Black, Indigenous and other communities of color, people with limited English proficiency, people with low income and, to the extent reasonably practicable, people with disabilities, older adults and youth in order to include them in engagement opportunities, at the minimum consistent with Title VI requirements.
- ☐ Analysis was conducted to document potential inequitable impacts for Black, Indigenous and other communities of color, people with limited English proficiency and people with low income compared to those for other residents.
- ☐ Public comments were considered throughout the process, and comments received on the staff recommendation were compiled, summarized and responded to, as appropriate.
- ☐ Adequate notification was provided regarding final adoption of the plan, including how to obtain more detailed information, at least 15 days in advance of adoption. Notice included information on providing public testimony.

***Retained records: Public engagement plans and documentation of each element that is checked.***

- ☐ One or more projects or programs included in the submitted list identified potential inequitable impacts through demographic analysis and public outreach. If box is checked, list each project and describe the response to identified potential inequitable impacts.
  - RTP # (if assigned)
  - Project name

- Project description
- Response to potential inequitable impacts

***Retained records:*** Summary of comments, key findings and changes made to final staff recommendation or adopted plan to reflect public comments (may be included in retained public engagement reports or legislative staff reports).

DRAFT

## Section B. Signed Certification Statement – 2023 Regional Transportation Plan

*By signing this section, project sponsors certify:*

- (1) that projects submitted to the 2023 RTP comply with federal and state Title VI and engagement requirements;*
- (2) their commitment to retaining records documenting this compliance; and*
- (3) their commitment to conducting future project development processes for projects in the RTP that are compliant with federal and state Title VI and engagement requirements.*

\_\_\_\_\_ (project sponsor agency)  
certifies the information provided in Section A of this form is accurate.

As attested by:

\_\_\_\_\_  
(agency manager signature)

\_\_\_\_\_  
(name and title)

\_\_\_\_\_  
(date)



**Section C. Documentation of Source(s) of Projects Submitted**

*Projects in the Regional Transportation Plan must come from plans, strategies, or studies developed and adopted through a public process with opportunities for public input. In this section, project sponsors provide a list of (1) the adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans or any other such plans or studies, in which the submitted projects are included and where additional information on public engagement may be found; and, if needed, (2) information for projects that were not identified in an adopted plan.*

**Table 1. Adopted Transportation Plans, Strategies and Studies**

Complete this table listing all adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans, or other such plans or strategies, in which the submitted projects are identified. Please include the plan, strategy, or study name, the adoption date and link to where the document can be accessed online. Add additional rows, if needed.

Plan name	Date adopted/ anticipated adoption date	Link

**Table 2. Projects Not From an Adopted Plan**

Identify any projects that are not from an adopted plan identified in Table 1 above (at the time of the call for projects). Provide the requested project information and a brief explanation as to how the project or program was identified outside of an adopted plan or strategy.

RTP Project ID (if assigned)	Project name	Project Sponsor	Agency Partner(s)	Project cost	Explanation

## Section D. For NEPA Projects Only - Summary of non-discriminatory, inclusive engagement

*In this section, the project sponsor provides additional information on public engagement elements and activities that illustrate how requirements are being met and best practices are being utilized for any projects subject to the National Environmental Policy Act (NEPA).*

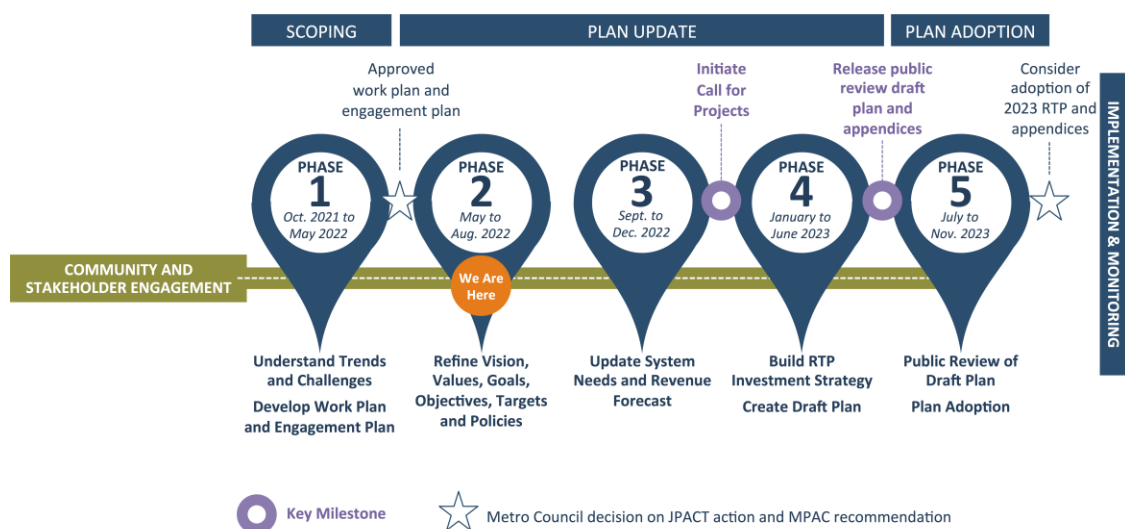
Provide a brief summary describing the engagement approach, practice and processes for each project subject to the [National Environmental Policy Act](#) (NEPA). The summary may be included in the final public engagement report for the 2023 RTP. List the project name and number for each project. Please respond to each of the following:

- Project name
- RTP Project ID#
- Project sponsor and agency partner(s)
- Brief description of the overall public engagement process, including time period
- Description of compliance with Title VI and Oregon [Goal 1: Citizen Involvement](#) and Goal [12: Transportation Planning](#) Administrative Rules, including:
  - Description of how the community has been involved to date and how community will continue to be involved through project design and/or development, including Black, Indigenous and other people of color, people with limited English proficiency and people with low income.
  - How input helped shape project or plan development and prioritization, including what changes came about because of community input particularly for Black, Indigenous and other people of color, people with limited English proficiency and people with low income; and what community stability and anti-displacement strategies have been or will be considered and included in the project and/or plan development.
- Any additional best practices that contributed to equity, transparency, and accountability.

## 2023 REGIONAL TRANSPORTATION PLAN

## Project Timeline and 2022 Discussions and Engagement Activities

Dates subject to change. Additional engagement activities are being scheduled for Fall 2022.



## Upcoming Discussions and Engagement Activities

Date	Who	2023 RTP Topic(s)
8/4/22	CTAC	HCT Strategy Update: Introduction and Policy Considerations
8/10/22	BIPOC Business Leaders Workshop	Active Transportation Return on Investment (ATROI) Study and Transportation Needs and Challenges
8/15/22	WCCC	HCT Strategy Update: Introduction and Policy Considerations
8/16/22	HCT Working Group	#2 HCT Strategy Update: Policy Analysis, Draft Policies, Corridor Analysis Approach
8/17/22	TPAC/MTAC workshop	Regional Mobility Policy: Draft Recommendations
8/18/22	JPACT	HCT Strategy Update: Introduction and Policy Considerations
8/24/22	MPAC	HCT Strategy Update: Introduction and Policy Considerations
Week of 8/29	Public On-line Survey	Transportation Needs and Priorities and High Capacity Transit Update
8/31/22	EMCTC TAC	Regional Mobility Policy: Draft Recommendations
September <i>Date TBD</i>	Business Roundtable	Transportation Needs and Challenges
9/1/22	CTAC	Regional Mobility Policy: Draft Recommendations
	WCCC TAC	RTP Vision and Goals and Process Update
9/2/22	TPAC	RTP Vision and Goals and Process Update
		Regional Congestion Pricing Policy Development
9/13/22	Metro Council Work Session	Vision and Goals and Objectives for the 2023 RTP
		Regional Congestion Pricing Policy Development
9/14/22	TPAC Workshop	RTP Financial Plan: Draft Revenue Forecast and Equitable Funding Research
		Climate Smart Strategy Preliminary Findings and Policy Considerations
9/15/22	JPACT	Regional Congestion Pricing Policy Development
		Vision, Goals and Objectives for the 2023 RTP

**2023 REGIONAL TRANSPORTATION PLAN: Project Timeline and 2022 Discussions and Engagement Activities**

Date	Who	2023 RTP Topic(s)
9/21/22	MTAC	Regional Congestion Pricing Policy Report
9/27/22	HCT Working Group	#3 HCT Strategy Update: Policies, Potential Investment Corridors, Network Vision, and Readiness Tiers Approach
9/28/22	MPAC	Regional Congestion Pricing Policy Report
9/29/22	JPACT/Metro Council Workshop #3	Creating Safe and Healthy Urban Arterials
10/3/22	R1ACT (requested)	Regional Mobility Policy: Draft Recommendations
10/5/22	EMCTC TAC	HCT Strategy Update: Visioning Corridors for Investment
10/6/22	CTAC	HCT Strategy Update: Visioning Corridors for Investment
	WCCC TAC	HCT Strategy Update: Visioning Corridors for Investment
		Regional Mobility Policy: Draft Recommendations
10/7/22	TPAC	RTP Financial Plan: Draft Revenue Forecast and Equitable Funding Research
		Safe and Healthy Urban Arterials
		Regional Mobility Policy Recommendation for 2023 RTP
10/10/22	WCCC	HCT Strategy Update: Visioning Corridors for Investment
10/TBD/2022	Freight Stakeholder Advisory Committee	Regional Freight Delay & Commodities Movement Study
10/17/22	EMCTC	HCT Strategy Update: Visioning Corridors for Investment
		Regional Mobility Policy: Draft Recommendations
10/18/22	Metro Council Work Session	Regional Mobility Policy: Draft Recommendations
10/19/22	TPAC/MTAC Workshop	RTP Needs Assessment Findings
		HCT Strategy Network Vision
	Clackamas County C-4 Subcommittee	HCT Strategy Update: Visioning Corridors for Investment
10/20/22	JPACT	RTP Financial Plan: Revenue Forecast and Equitable Funding Research
		Regional Mobility Policy: Draft Recommendations
		Safe and Healthy Urban Arterials ( <i>followup if needed</i> )
10/25/22	Metro Council Work Session	Regional Transportation Needs Assessment Findings
		RTP Financial Plan: Revenue Forecast and Equitable Funding Research
		RTP Call for Projects Policy Framework and Approach
10/26/22	MPAC	HCT Network Vision
		Regional Transportation Needs Assessment Findings
10/27/22	JPACT/Metro Council Workshop #4	Strengthening the Backbone of Regional Transit
11/3/22	Metro Council Meeting	Regional Mobility Policy Recommendation for 2023 RTP
11/4/22	TPAC	RTP Call for Projects Policy Framework and Approach
		Regional Mobility Policy Recommendation for 2023 RTP-Rec'd to JPACT
11/9/22	TPAC Workshop	Regional Freight Delay & Commodities Movement Study
	MPAC	Regional Transportation Needs Assessment Findings
		Climate Smart Strategy Update
11/10/22	JPACT/Metro Council Workshop #5	Working Together to Tackle Climate Change

**2023 REGIONAL TRANSPORTATION PLAN: Project Timeline and 2022 Discussions and Engagement Activities**

Date	Who	2023 RTP Topic(s)
Mid-Nov.	HCT Working Group	#4 HCT Strategy Update: Results of Vision Engagement, Follow-up on Readiness Tiers Approach, Needs and Revenue Forecast Updates
11/16/22	MTAC	Climate Smart Strategy Update
		RTP Call for Projects Approach
11/17/22	JPACT	RTP Call for Projects Policy Framework and Approach
		RTP Financial Plan: Revenue Forecast
		Regional Transportation Needs Assessment Findings
12/2/22	TPAC	RTP Call for Projects Policy Framework and Approach
		Climate Smart Strategy Update
		RTP Financial Plan: Revenue Forecast
	REMTEC	Regional Mobility Policy Recommendation for 2023 RTP –Rec’d to JPACT
12/15/22	JPACT	Call for Projects Approach
		RTP Call for Projects Policy Framework and Approach
		Regional Mobility Policy Recommendation for 2023 RTP
	Metro Council	Climate Smart Strategy Update
		RTP Call for Projects Policy Framework and Approach
Mid-Dec.	HCT Working Group	Climate Smart Strategy Update
		Regional Mobility Policy Recommendation for 2023 RTP
		#5 HCT Strategy Update: Corridor Investment Readiness Tiers

## 2023 REGIONAL TRANSPORTATION PLAN: Project Timeline and 2022 Discussions and Engagement Activities

### Past discussions and engagement activities

Date	Who	2023 RTP Topic(s)
3/9/22	TPAC Workshop	Safe and Healthy Urban Arterials
4/21/22	JPACT	Approval of work plan and engagement plan for 2023 RTP
5/5/22	Metro Council	Approval of work plan and engagement plan for 2023 RTP
5/25/22	Confederated Tribes of the Umatilla Indian Reservation	Consultation on 2023 RTP
6/3/22	REMTEC	RTP Process Briefing
6/3/22	TPAC	Vision, Goals and Objectives for the 2023 RTP Regional Congestion Pricing Policy
6/6/22	Metro Council, JPACT, MPAC, TPAC and MTAC	Regional Transportation Modeling 101 Workshop
6/14/22	Metro Council	Emerging Transportation Trends: final results & recommendations for 2023 RTP
6/15/22	TPAC/MTAC workshop	Regional Mobility Policy: Draft Framework, Measures and Action Plan Emerging Transportation Trends: final results & recommendations for 2023 RTP Regional Freight Delay & Commodities Movement Study
6/16/22	JPACT	Emerging Transportation Trends: final results & recommendations for 2023 RTP Regional Freight Delay & Commodities Movement Study
6/21/22	Metro Council	Regional Congestion Pricing Policy
6/22/22	JPACT and Metro Council	Climate and Transportation Expert Panel
6/22/22	MPAC	Emerging Transportation Trends: final results & recommendations for 2023 RTP
6/29/22	Confederated Tribes of the Grand Ronde	Consultation on 2023 RTP
6/30/22	Metro Council/JPACT Workshop #1	Vision, Goals and Objectives for the 2023 RTP
6/30/22	HCT Working Group Meeting #1	HCT Strategy Update: Introduction and Policy Considerations
7/8/22	TPAC	Safe and Healthy Urban Arterials
7/11/22	Freight Stakeholder Advisory Committee	Regional Freight Delay & Commodities Movement Study
7/12/22	Confederated Tribes of Siletz Indians	Consultation on 2023 RTP
7/13/22	TPAC Workshop	Regional Transportation Needs Assessment Approach HCT Strategy Update: Introduction and Policy Considerations Regional Congestion Pricing Policy
7/20/22	MTAC	HCT Strategy Update: Introduction and Policy Considerations
7/26/22	Metro Council Work Session	HCT Strategy Update: Introduction and Policy Considerations Regional Mobility Policy: Draft Framework, Measures and Action Plan
7/27/22	MPAC	Regional Congestion Pricing Policy
7/28/22	Metro Council/JPACT Workshop #2	Regional Congestion Pricing Policy and ODOT OHP Tolling Amendments

Date: August 26, 2022  
To: Transportation Policy Alternatives Committee and Interested Parties  
From: Alex Oreschak, Senior Transportation Planner  
Subject: 2023 Regional Transportation Plan Policy Brief –Pricing Policy Development

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## Purpose

This meeting is to:

1. Discuss with and receive feedback from TPAC on revised proposed pricing policy language for the 2023 Regional Transportation Plan (RTP)

## Request to TPAC

Provide input and comment on proposed pricing policy language for the 2023 RTP update.

## 2023 RTP Draft 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. Metro staff worked with a consultant team (Nelson\Nygaard) to review TPAC and MTAC feedback following that meeting and develop draft pricing policy language for the 2023 RTP. That draft language was presented to TPAC on June 3, 2022. Following that meeting, TPAC members provided input on the draft language, and revised draft policy language was shared with TPAC at a workshop on July 13, 2022.

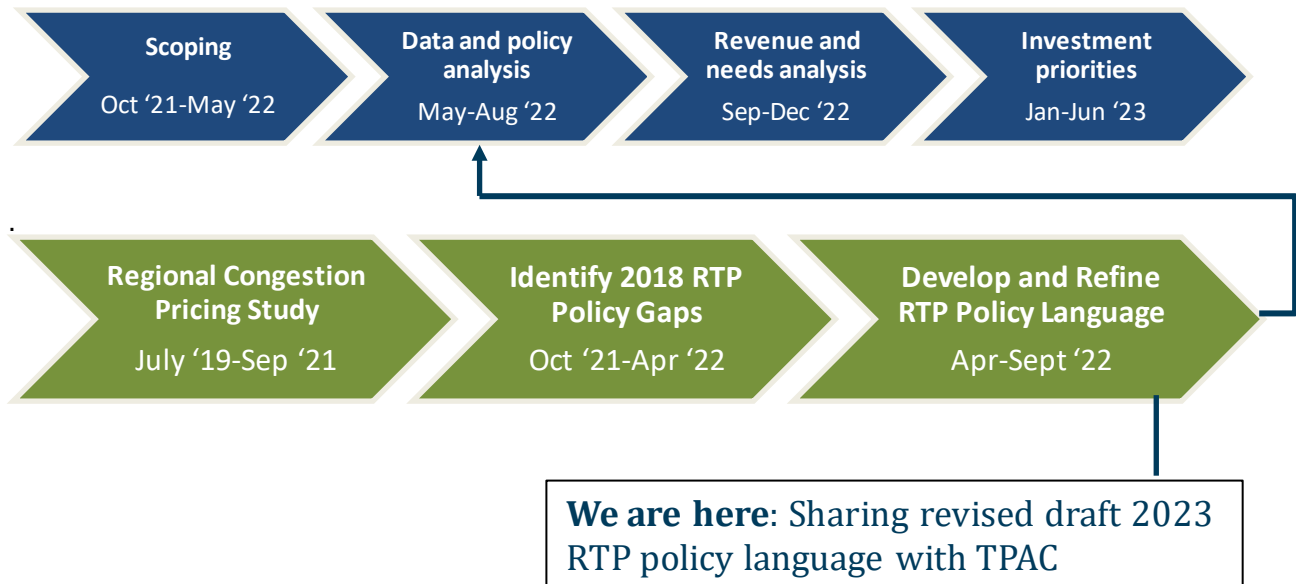
Since the July 13, 2022 workshop, TPAC members have provided additional feedback on the draft pricing policy language. Metro staff and the consultant team have further revised the draft language to reflect that feedback; the revised draft language is documented in **Attachment 1: Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context August 2022**.

A summary table of the meetings and workshops at which this policy development has been discussed (including upcoming meetings in September 2022) is shown below.

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



Staff is requesting feedback from TPAC members on the revised draft pricing policy language. Input received at and following this month's meetings will conclude the current phase of developing and refining the proposed 2023 RTP policy language, as shown in the figure below. Feedback received this month will help guide final refinement of the draft language for inclusion in the draft 2023 RTP chapters, which will be shared with TPAC and other committees in late winter / early spring.



### Summary of July 2022 Feedback on 2023 RTP Pricing Policy

At the July 13, 2022 TPAC workshop, Metro staff shared a presentation on revised pricing policies for the 2023 RTP update and requested feedback from committee members by July 29, 2022. Written feedback was received from seven partner agencies and is documented in **Attachment 2: Feedback from July 2022 TPAC Meeting**. Attachment 2 also includes a high-level summary of the feedback received, identifying key themes and how Metro staff has or will address those themes. Metro staff also collected input at a joint JPACT & Metro Council Workshop on July 28, 2022. A summary of that workshop and the feedback received is documented in **Attachment 3: JPACT & Council Workshop #2 (July 28, 2022) Summary August 2022**. This information was used to help revise the 2023 RTP pricing policy recommendations identified above.

### Next Steps – Refined Pricing Policy Options

Metro staff requests that TPAC provide feedback on the revised draft pricing policy language by **Friday, October 28**. Staff will also present the revised pricing policy options identified in this packet to, and seek input from, Metro Council, JPACT, MTAC, and MPAC in September 2022.

Following those meetings, staff will further refine the draft pricing policy recommendations and incorporate the revised policy language into the draft 2023 RTP chapters, which will be shared with TPAC and other committees in late winter / early spring.

### Questions for TPAC

- Are there still gaps in the revised policy that you would like to see addressed?
- Are there any additional specific changes would you like to see to improve the revised policy language?

- Do you generally support advancing the proposed language to the next phase of RTP development?

**Attachments:**

Attachment 1: Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context August 2022

Attachment 2: Feedback from July 2022 TPAC Meeting

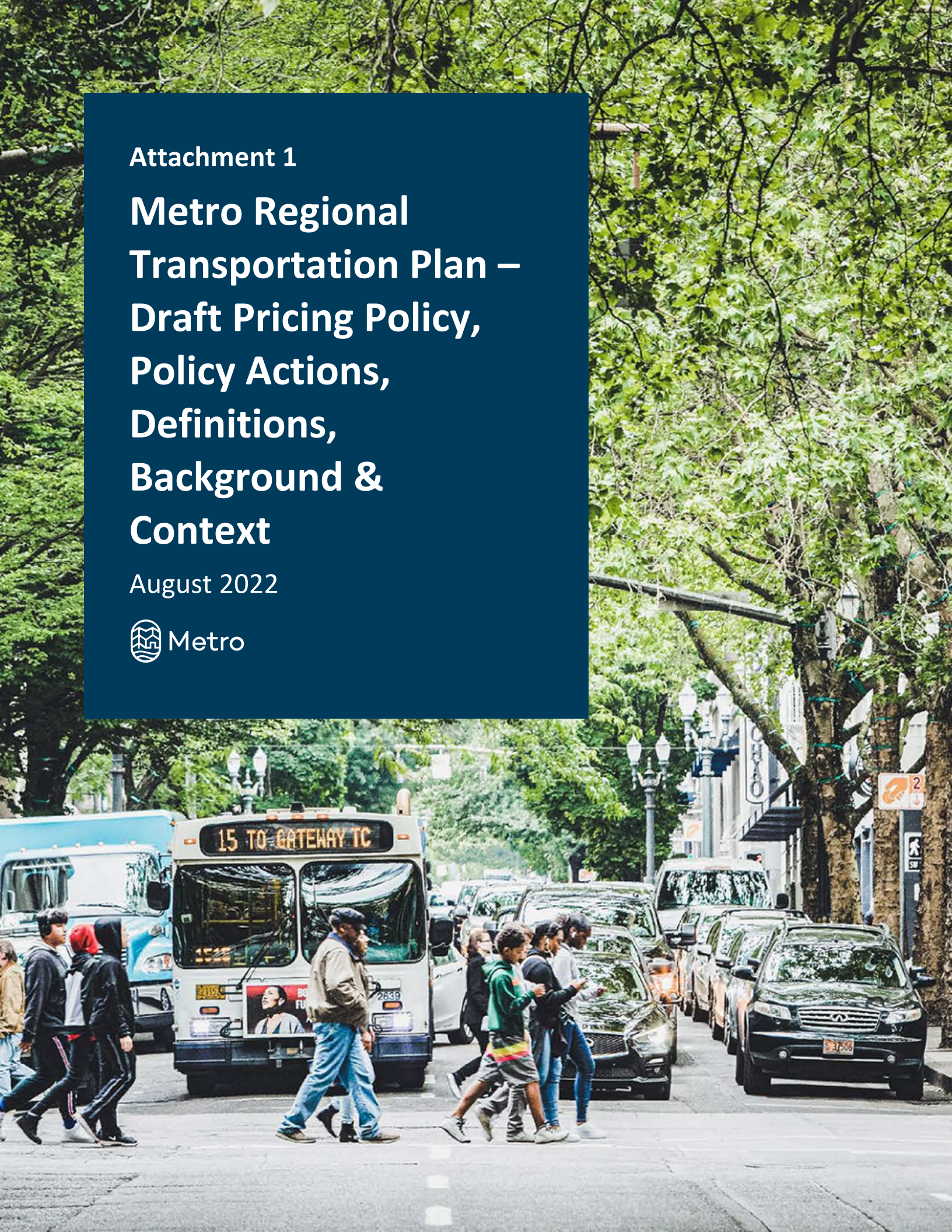
Attachment 3: JPACT & Council Workshop #2 (July 28, 2022) Summary August 2022



Attachment 1

# Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context

August 2022







### 3.2.5 Pricing Policies

With transportation pricing, our region can have better, faster transit, cleaner air, fewer hours sitting in traffic, and more equitable access to jobs and opportunities. Pricing programs will need to be carefully designed to ensure the process to develop them is equitable, revenue is reinvested equitably and to support regional goals, diversion on local streets is mitigated, and pricing strategies are interoperable throughout the region.

## What is transportation pricing?

Transportation pricing is the use of a pricing mechanism, such as tolls or parking fees, to reduce traffic congestion and greenhouse gas emissions, encourage a shift to travel via different modes, a different route, or a different time of day, and raise revenue for transportation investments and mitigation for impacts resulting from pricing.

While parking pricing has proven to be an effective strategy in the region for many years, cordons, roadway pricing, and other pricing strategies are only beginning to be discussed and implemented as a strategy in the greater Portland region. However, these strategies have been effective in cities around the world for many leaders and government agencies in the Portland metro region recognized pricing as a needed, high-impact, tool in the 2018 Regional Transportation Plan (RTP) and other plans.<sup>1</sup>

## Pricing Strategies

Pricing could include a range of tools, including:



### VEHICLE MILES TRAVELED FEE

*Drivers pay a fee for every mile they travel*



### CORDON PRICING

*Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)*



### ROADWAY PRICING

*Drivers pay a fee or toll to drive on a particular road, bridge, or highway*



### PARKING PRICING

*Drivers pay to park in certain area*

Each of these pricing strategies could vary by time of day, by area, by types of drivers on the road, and by income levels. Pricing strategies can also take the form of a “program” (i.e. parking pricing) or a “project” (i.e. the I-205 toll project).

<sup>1</sup> 2018 Regional Transportation Plan, TSMO Strategic Plan (2010), Climate Smart Strategy (2014), The Federal Congestion Management Process, 2021 City of Portland Pricing Options for Equitable Mobility Final Report, 2018 Oregon Department of Transportation Value Pricing Feasibility Analysis.

Figure 1 outlines which local, regional, and state agencies could potentially implement various types of pricing strategies based on Oregon state law. Other federal or local laws may provide additional guidance or restrictions on the use of pricing.

**Figure 1 Pricing and Implementing Agency**

Type of Pricing	Definition	Implementing Agency
Road User Charge / Vehicle Miles Traveled Fee	Drivers pay a fee for every mile they travel	State DOT, potentially local roadway authorities
Cordon Pricing	Drivers pay a fee to enter an area, like downtown Portland (and sometimes pay to drive within that area)	City, County
Roadway Pricing and Tolling	Drivers pay a fee or toll to drive on a particular road, bridge, or highway	Local Roads: City, County
		Highways and Freeways: State DOT
Parking Pricing	Drivers pay to park in certain areas	City, County, Transit Agency (park-and-rides)

## Why is pricing an important strategy for our region?

Congestion is a problem in the Portland metro region. Changing travel patterns and a growing population mean more traffic and less freedom to travel reliably around the region. Congestion can also have significant economic, social, and environmental impacts.

- **Greenhouse gas emissions are on the rise.** Transportation in Oregon contributes to 42 percent of our greenhouse gas emissions. These emissions have increased 8% since 1990, while other sectors declined during the same time period.<sup>2</sup>
- **Congestion impacts our equity focus areas most significantly.** In the Portland region, the 10 lowest income and 10 highest minority neighborhoods experience more exposure to toxic air than the average neighborhood.<sup>3</sup>
- **Travel patterns for people and goods are unreliable.** The Portland metro region is the 11<sup>th</sup> most congested region in the country.<sup>4</sup> In 2021, people in the Portland metro region spent 52 hours stuck in traffic and freight accounted for 9.4 percent of off-peak regional freeway

<sup>2</sup> 2021 Pricing Options for Equitable Mobility Final Report.

<sup>3</sup> 2012 Portland Air Toxics Solutions Committee Report and Recommendations, Oregon Department of Environmental Quality.

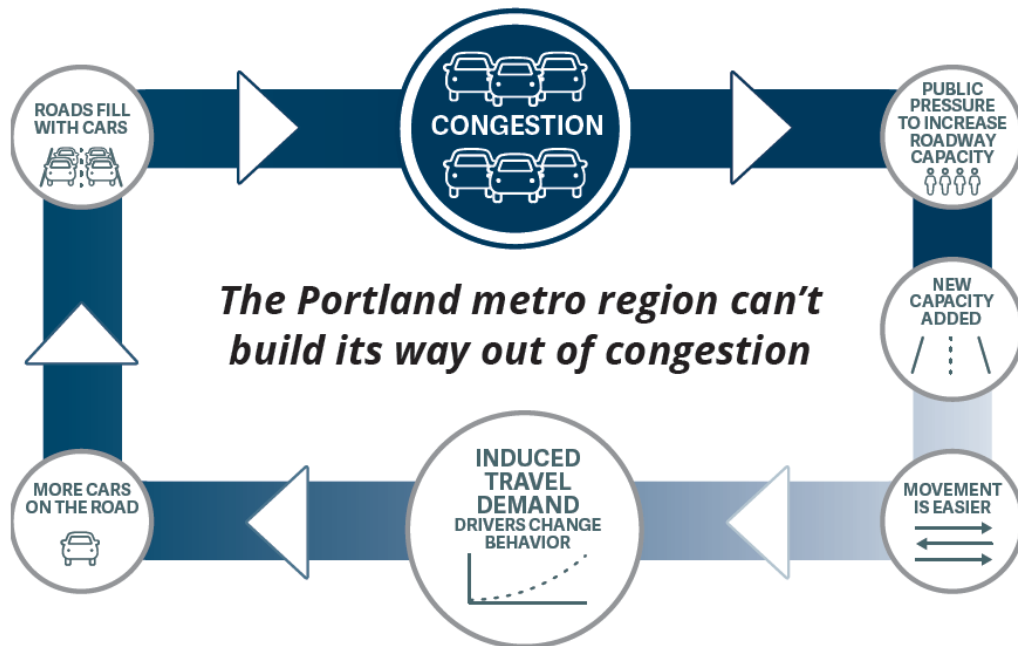
<sup>4</sup> 2021 Inrix Global Scorecard.

congestion.<sup>5</sup> After a brief subsidence with the COVID-19 pandemic, congestion and traffic volumes are on the rise again.<sup>6</sup>

- **Our region is growing.** The Portland metro region is expected to grow by more than 600,000 new residents and 350,000 more jobs by 2040.<sup>7</sup>

Without pricing programs and policies in place, traffic volumes and congestion will continue to increase beyond supportable levels, impacting low-income populations and people of color, contributing to catastrophic climate impacts, and hurting our regional economy.

## The Cycle of Congestion



<sup>5</sup> 2040 Freight Existing Conditions Report, July 2021.

<sup>6</sup> [2022 ODOT Impacts of Covid-19 on Traffic](#).

<sup>7</sup> 2018 Regional Transportation Plan.

## How can pricing help our region?

Transportation investments in the Portland metro region have a long history of contributing to racial inequity and neighborhood displacement. Decades ago, public agencies planned and built new highways that cut through Black communities, splitting neighborhoods, and contributing to poor air quality, noise pollution and safety issues.

Transit investments have also been made without complementary affordable housing strategies, leading to gentrification and further displacement.

Today, while the region’s residents all feel the impacts of congestion, historic inequities in the transportation system amplify impacts on people of color and low-income people:

- Housing costs are increasing faster than incomes, making travel distances longer for people of color and low-income people.
- Communities of color and low-income communities have longer commutes that are made slower and more unreliable when roadways are congested.
- Major roads and freeways often run through communities of color and low-income communities, resulting in disproportionately high rates of air pollution and chronic illnesses

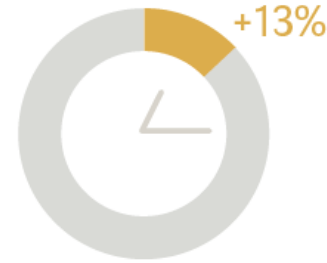
Pricing can be a key tool for jurisdictions as they look to meet state, regional, and local goals around mobility, climate, safety and equity.

Pricing that is designed and implemented through an equity and climate change lens has the potential to transform transportation in our region in a variety of ways. While pricing programs introduce new costs to users, they also lead to more efficient use of streets and highways and can help address current and historic inequities borne by people of color and people with low incomes.

Pricing has been shown to encourage use of transit or other modes and reduce overall vehicle miles traveled (VMT). Lower VMT results in decreased congestion, reduced travel times for personal vehicles, freight and buses, and lower greenhouse gas emissions. Pricing is more likely to be successful in areas where transit service is already well established and is improved in conjunction with pricing.

Pricing can also have positive impacts on safety. A combination of lower VMT as a result of pricing and reinvestment of pricing revenue in projects that increase safety can, in the long term, lead to decreases in crashes and injuries in and around priced areas.

*In the Portland region, average commute times for Black commuters are 13% longer than white commuters.*



*The lowest income households spend 35% of their income on transportation. Those with the highest income spend 13% or less.*

*Source: U.S. Bureau of Transportation Statistics*



Additionally, for many jurisdictions, pricing may be identified as a tool to raise revenue for specific projects and be a key element of a funding plan. This could include, for example, replacement of an aging bridge, or investments in multimodal infrastructure and transit service or amenities. However, for a pricing program to successfully meet state, regional, and local goals, pricing revenue must do more than simply fund specific infrastructure projects. To be most successful, pricing should:

- **Allocate revenue where it matters most.** If designed thoughtfully, pricing programs that have built equity into the program can introduce progressive fee structures and reinvest revenue in the people and places that have historically been, and continue to be, the most negatively impacted.
- **Reinvest revenue to support our region's goals.** Revenue collected from pricing programs can be reinvested to enhance transit service and access, safety improvements, and walking and bicycling networks. It can also be used to provide incentives and subsidies to increase the number of people biking, walking, and taking transit for more trips.

With pricing our region can have better, faster transit, cleaner air, fewer hours sitting in traffic, and more equitable access to jobs and opportunities.

## Benefits to Freight and Businesses

Pricing strategies can help freight and businesses succeed by reducing congestion on highways and local roads:

- Pricing can benefit freight, especially truck transportation, as it supports a more reliable system.
- Pricing can encourage people to use other forms of transportation to travel and leave highways open for people and businesses, like freight, who do not have other options.
- Pricing can support lowered cost of doing business – time is money.

## Revenue Reinvestment

Equitable revenue reinvestment is a critical consideration from the outset of a pricing program. Reinvestment strategies must be guided by the purpose of the program, the expected costs and benefits, and input from community members impacted by the program. Revenue reinvestment should be focused on neighborhoods that do not have or could lose access to the priced area. Increasing access to the priced area, especially for places with limited access today or places that would see reduced access without reinvested revenues, should be a focus.

Key principles to consider related to revenue reinvestment include:

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<sup>8</sup> 2018 Regional Transportation Plan.

- All revenues collected through the pricing program should be reinvested in a manner that helps meet state, regional, and local goals related to reductions in greenhouse gas emissions and congestion while improving mobility and safety. Reinvestment should be prioritized in areas designated as equity areas most affected by pricing programs.
- Revenue should be reinvested in the area in which it is collected.
- Revenue should not be reinvested in infrastructure solely for single-occupancy vehicles.

Revenue could be reinvested in several ways (Figure 2). Implementing agencies will need to consider any state constitutional restrictions to revenue reinvestment, or other limitations based on federal or state funding or program approvals, based on the type of pricing program established.

**Figure 2 Potential Options for Revenue Reinvestment**

Category	Description	Target
<b>Transit</b>		
Infrastructure & speed and reliability improvements	Improved facilities, stops, passenger amenities, transit priority treatments, and similar improvements	Regional
		In equity zones or direct benefit to
Operation and maintenance	Operation and maintenance of existing and future transit assets and services	Regional
<b>Active Transportation</b>		
Access to priced area	Improved bike, pedestrian, or micromobility access to transit or priced area directly	Regional
		From/to equity zones
Neighborhood access	Improved bike, pedestrian, or micromobility access to transit or neighborhood activity centers such as shopping centers and employment hubs	From equity zones to transit or neighborhood activity centers
First/last mile to key employment hubs	Improved bike, pedestrian, or micromobility access to employment hubs from transit	Regional
<b>Mode Shift and Single Occupancy Vehicle Alternative Programs</b>		
Commuter Credits	Benefit to users of the pricing system who swipe their transit card during peak hours rather than drive	Regional
Transit subsidy	Free or discounted transit pass or cash on transit card	Regional

	Receive a higher transit subsidy than general regional population	Low-income populations and people of color
Other programs	Electric vehicle (EV) carshare subsidy, bikeshare subsidy, micromobility subsidy, carpool benefit, benefit to drivers of EV vehicles for up to 10 years	Low-income populations and people of color

## Potential Revenue Opportunities and Limitations

Depending on the pricing model, the use of revenue generated from a pricing program may be subject to legal limits. For example, Oregon Constitution Article IX Section 3a limits the use of revenue from taxes on motor vehicle use and fuel. The principle underlying this language is that special taxes paid only by highway users should be used only for highway purposes. Whether a particular pricing model is subject to this constitutional restriction is determined by Oregon courts on a case-by-case basis. Recently, the Oregon Supreme Court concluded that Article IX section 3a's limit on use of tax revenue does not apply to a privilege tax imposed on vehicle dealers for the privilege of engaging in the business of selling taxable motor vehicles at retail. The Court found that the privilege tax was not based on the status of motor vehicle ownership, but rather on the activity of selling motor vehicles. Jurisdictions considering pricing should review all potential legal limits and structure the pricing model with these limits in mind.

## What state and regional pricing work is underway?

Pricing strategies are being considered in the greater Portland Metropolitan Region, within the City of Portland, and along the Multnomah Falls and the Waterfall Corridor area. They are being used to combat traffic congestion and greenhouse gas emissions. This section provides a high-level overview of statewide legislation and rulemaking related to pricing and describes how the revenue from pricing is intended to support infrastructure in the region.

### State Legislation & Rulemaking

#### House Bill 2017

House Bill 2017 invested millions of dollars to improve Oregon’s transportation network. Part of that funding was allocated to tolling. This directed the Oregon Transportation Commission to implement traffic congestion tolls on I-5, I-205, and in the Portland Metro region.<sup>9</sup>

#### House Bill 3055

House Bill 3055 created flexibility in allocating \$30 million per year of funds to projects listed in House Bill 2017, I-5, Boone Bridge, and toll program implementation. HB 3055 directed that tolling should be used to manage congestion, raise revenue, make improvements or fund efforts on the tollway and on adjacent, connected, or parallel highways, and minimize and mitigate impacts to underrepresented and disadvantaged communities. It also required that an equitable tolling strategy be implemented before tolls are assessed, and for a low-income toll report to be provided to the Joint Transportation Committee and Oregon Transportation Committee.<sup>10,11</sup>

#### Low-Income Toll Report

[PLACEHOLDER – will be adopted by the OTC sometime this fall]

#### 2022 Oregon Highway Plan Toll Policy Amendment

[PLACEHOLDER – will be adopted by the OTC sometime this fall]

#### Climate-Friendly and Equitable Communities

Parking reform is part of the Oregon Land Conservation and Development Commission’s Climate-Friendly and Equitable Communities (CFEC) rulemaking. The reform decreases required parking costs for new development applications near frequent transit and for certain development types by unbundling parking packages in developments, implementing parking maximums, and incentivizing

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<sup>9</sup> <https://www.oregon.gov/odot/tolling/Pages/About.aspx>

<sup>10</sup> <https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureAnalysisDocument/61936>

<sup>11</sup> <https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB3055/Enrolled>

active transportation travel options. This parking mandate reform aims to decrease congestion by discouraging driving and parking. This rule was enacted for new development as of July 2022 and will be enacted in 2023 for existing developments.<sup>12</sup> This reform would also require that parking lots include solar power or trees, pedestrian-friendly infrastructure, and 50% of new residential parking spaces equipped with electric vehicle charging.<sup>13</sup>

## Pricing Projects and Committees in the Portland Metro Region

### ODOT: I-205 Toll Project

ODOT is planning to toll drivers on I-205 near the Abernethy and Tualatin River Bridges. The revenue from these tolls will be used to continue the I-205 Improvement Project past Phase 1A, which aims to decrease congestion, reduce greenhouse gas emissions, increase active transportation, and provide facilities that are resilient to earthquake damage. As part of a 2018 RTP amendment for this project, ODOT agreed to a series of commitments that would address regional concerns related to the I-205 toll project. See Chapter 8 for additional information.

### Regional Mobility Pricing Project

The purpose of the Regional Mobility Pricing Project (RMPP) is to use congestion pricing on I-5 and I-205 to manage traffic congestion on these facilities in the Portland, Oregon metropolitan area in a manner that will generate revenue for transportation system investments (Figure 3). The fees would vary depending on time of day, income level, and type of car and would help fund critical multimodal projects in the region.<sup>14</sup>

**Figure 3 Regional Mobility Pricing Project Map**



<sup>12</sup> <https://www.oregon.gov/lcd/CL/Documents/CFECOOverviewImplementation.pdf>

<sup>13</sup> <https://www.oregon.gov/lcd/LAR/Pages/CFEC.aspx>

<sup>14</sup> <https://www.oregon.gov/odot/tolling/Pages/I-5-Tolling.aspx>

## I-5 Bridge Replacement

The Interstate Bridge Replacement Program will toll drivers crossing I-5 as part of the funding to finance a replacement bridge on I-5 between Portland and Vancouver. The new bridge will address congestion, earthquake vulnerability, safety, impaired freight movement, inadequate bike and pedestrian paths, and limited public transportation. Revenue from the tolls will be used to fund construction, maintenance, and operation of the bridge and associated improvements.<sup>15</sup>

### ODOT Equity and Mobility Advisory Committee

The Oregon Department of Transportation (ODOT)'s Equity and Mobility Advisory Committee (EMAC) was created to directly advise the OTC and ODOT on how tolls on Interstate 205 (I-205) and I-5, 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. The purpose of the committee is to address four equity pillars: full participation of impacted populations and communities, affordability, access to opportunity, and community health. EMAC goals specify that equity and mobility strategies must go beyond pricing revenue and show reinvestments into better functioning transportation infrastructure and a decrease in personal car usage. In July 2022, EMAC shared its recommendations on shaping an equitable toll program with the Oregon Transportation Commission.

## PBOT Pricing Options for Equitable Mobility

Portland Bureau of Transportation (PBOT)'s Pricing Options for Equitable Mobility (POEM) task force explored if and how new pricing strategies could be used in the City of Portland to improve mobility, address the climate crisis, and advance equity for people historically underserved by the transportation system. . In October 2021, Portland City Council accepted the [POEM Task Force final recommendation report](#). This recommendation report includes principles of pricing for equitable mobility, nearer-term pricing strategies, longer-term pricing recommendations, and a suite of complementary strategies to advance alongside pricing. T Pricing Strategies explored through POEM included prices on parking, prices on vehicle-based commercial services (e.g., private for-hire trips and urban delivery), highway tolling, cordons or area pricing, and road usage or per-mile charges.<sup>16</sup>

<sup>15</sup> <https://www.interstatebridge.org/faq>

<sup>16</sup> <https://www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem>

## Multnomah Falls and the Waterfall Corridor Timed-Use Permits

While outside of the metropolitan planning area, timed-use permits at Multnomah Falls and the Waterfall Corridor provide a useful example of innovative parking pricing. ODOT, Oregon State Parks, U.S. Forest Service, and Multnomah County are requiring that personal vehicles pay for a timed-use permit to access Multnomah Falls and federal lands adjacent to the Waterfall Corridor. The permits are required from May 24 to September 5, 2022, during peak hours (9am to 6pm) when data has shown crowds are busiest. The parking pricing strategy is used to limit the number of personal vehicles that enter the parking lot for environmental, safety, and emergency response reasons. The fee does not apply to those entering the park through active transportation modes, before or after peak hours, and same-day passes. The fee is used to pay for the online pricing system and does not generate additional revenue for other improvements. The Waterfall Corridor Timed-Use permits apply to visitors that exit I-84 from exit 28 through exit 35, while the Multnomah Falls timed-use permit applies to visitors to Multnomah Falls.<sup>1</sup>

## Federal Pricing Programs

Section 129 and the Value Pricing Program are examples of pricing strategies that have worked. Since pricing is new to the Portland area, these two federal examples show initial successes, the value of pursuing pricing, and how pricing programs can be amended over time.

### 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.<sup>17</sup>

### 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/](https://ops.fhwa.dot.gov/congestionpricing/value_pricing/) for more detail.

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<sup>17</sup> [https://www.fhwa.dot.gov/ipd/tolling\\_and\\_pricing/tolling\\_pricing/section\\_129.aspx](https://www.fhwa.dot.gov/ipd/tolling_and_pricing/tolling_pricing/section_129.aspx)

## What did Metro learn from the Regional Congestion Pricing Study?

In 2021 Metro completed the Regional Congestion Pricing Study (RCPS). Directed by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council in the 2018 RTP, the study evaluated a variety of pricing strategies to better understand if the region could benefit from pricing. The study found that pricing can be an effective strategy for reducing drive-alone trips and overall VMT, but its impacts can vary widely by geography and demographics, as well as by what specific strategy is implemented and how it is implemented.

Metro used its travel demand model to conduct in-depth modeling and analysis to help regional policymakers understand the potential performance of different types of pricing tools (VMT fee, cordon, parking, and roadway pricing). Each scenario was analyzed for how well it performed relative to the four regional priorities (safety, equity, congestion, and climate) using performance metrics grounded in the 2018 RTP.

### Summary of Key Findings

The RCPS demonstrated that pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 RTP, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes.

All four types of congestion pricing could help address congestion and climate priorities. All eight scenarios that were tested reduced the drive alone rate, vehicle miles traveled, and greenhouse gas emissions, and increased daily transit trips. In fact, the projected improvements were comparable to modeled scenarios with much higher investment in new transportation projects. However, the geographic distribution of benefits, impacts, and costs varied by scenario.

Traffic diversion, travel time savings, and costs to travelers varied by location and by congestion pricing tool. For example, the two roadway pricing scenarios, which evaluated a toll on all the region's freeways, identified significant traffic diversion onto the arterial network, even as volumes and delay on the freeways fell. Without changes, some scenarios would have disproportionate impacts on equity communities and key geographies.

Geographic distributions of benefits and costs can inform where to focus investments and affordability strategies. In-depth analysis will be necessary to understand benefits (who and where) and costs (who and where) of any future projects. The study also identified tradeoffs for implementing pricing scenarios. Overall regional transportation costs and individual traveler costs varied by scenario. All eight scenarios that were tested increased the overall cost for travel for the region, but some scenarios spread the costs widely while others concentrated them on fewer travelers. Those that spread the costs also had the highest overall cost for travel in the region and the highest revenue potential. Higher overall transportation costs equal higher revenue, which can allow for investment in improvements to address safety and equity concerns.



## Pricing and Equity

Today's transportation system puts more burdens on people of color and people with low incomes. Gas taxes and motor vehicle fees are not tied to a driver's ability to pay. Households with lower incomes spend 22 percent more of their income on transportation than households with higher incomes. People of color and people with low incomes are more likely to use transit and more likely to live further from employment centers. They may also need to commute between more than one job. Increasing congestion negatively impacts transit speed and reliability as buses sit in traffic. This increases commute times for transit users. Federal and state funding prioritizes auto infrastructure over investment in transit, favoring people with higher means and access to a vehicle.

### Today's Transportation Funding is Inequitable



Pricing can improve or harm equity in the region. A pricing program designed with the goal of improving equity, rather than attempting mitigations later, has the potential to produce positive outcomes. Outcomes are determined by the way funds are collected and where and in whom they are reinvested. The Revenue Considerations and Policy sections below describe methods that can be used to lead to equitable outcomes and strategic reinvestment into pricing programs. The Regional Congestion Pricing Study found that without changes some scenarios harmed equity by increasing costs and decreasing access. A thoughtful and community-focused approach will be necessary as our region continues to explore pricing options.

## 3.2.5.1 PRICING POLICIES

Pricing policies apply to the planning, implementation, monitoring and evaluation of pricing programs and projects in the region, as defined in Chapter 3.1 (Regional Transportation System Components).

### Pricing Policies

- |                 |   |
|-----------------|---|
| <b>Policy 1</b> | <b><u>Mobility:</u></b> Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs. |
| <b>Policy 2</b> | <b><u>Equity:</u></b> Center equity and affordability into pricing programs and projects from the outset.   |
| <b>Policy 3</b> | <b><u>Safety:</u></b> Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.  |
| <b>Policy 4</b> | <b><u>Diversion:</u></b> Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.   |
| <b>Policy 5</b> | <b><u>Climate and Air Quality:</u></b> Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.   |
| <b>Policy 6</b> | <b><u>Emerging Technologies:</u></b> Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.   |

**Pricing Policy 1. Mobility: Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.**

[Placeholder for background/context]

**Action Items:**

1. Set rates for pricing at a level that will manage congestion, reduce VMT per capita, and improve reliability on the priced facility and in areas affected by diversion.
2. Collaborate with relevant state, regional, and local agencies and communities when setting, evaluating, and adjusting program or project specific goals.
3. Reinvest a portion of revenues from pricing into modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction per capita, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
4. Identify opportunities to partner with other agencies to fund or construct transit, bike, and pedestrian improvements. Work with transit agencies and other jurisdictional partners, including consideration of opportunities identified in the High Capacity Transit Strategy and Regional Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by pricing revenues due to revenue restrictions.
5. Consider non-infrastructure opportunities to encourage mode shift and reduce VMT per capita, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, discounts or exemptions for people with low-income or other qualifying factors based on equity analysis.

## Pricing Policy 2. Equity: Center equity and affordability into pricing programs and projects from the outset.

[Placeholder for background/context]

### Action Items:

1. Conduct general public engagement in a variety of formats, including formats that accommodate all abilities, all levels of access to technology, and languages other than English. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
2. Engage equity groups, people with low-income, and people of color in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
3. Use a consistent methodology across implementing agencies for defining equity groups and equity areas for pricing programs and projects, including but not limited to the methodology used for establishing the Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and equity areas should also be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
4. Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
5. Provide a progressive fee structure which includes exemptions, credits, or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income, and minimize barriers to qualification by building on existing programs or partnerships where applicable. Target outreach for enrollment in a discounts, credits, or exemptions in equity areas and communities with higher-than-average shares of people with low income and people of color.
6. Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
7. Reinvest a portion of revenues from pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.
8. Enforcement of pricing and fine structures for non-payment should be designed to reduce the potential for enforcement bias and to minimize burdens on people with low incomes.

**Pricing Policy 3. Safety: Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.**

[Placeholder for background/context]

**Action Items:**

1. Collaborate with relevant state, regional, and local agencies and communities when identifying traffic safety impacts and mitigations associated with pricing.
2. Use a data-driven approach to identify potential traffic safety impacts on the priced system and in areas affected by diversion both during and after implementation of pricing programs and projects; monitor with real-time data after implementation.
3. Context-specific monitoring and evaluation programs should be conducted by implementing agencies in coordination with partner agencies and be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
4. Adjust safety strategies based on monitoring and evaluation findings.
5. Reinvest a portion of revenues on the priced system and in areas affected by diversion to manage safety issues caused by pricing programs and projects and to improve safety, for example, through investments in transit, bike, and pedestrian improvements.
6. Pricing programs and projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4

**Pricing Policy 4. Diversion: Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.**

[Placeholder for background/context]

**Action Items:**

1. Collaborate with relevant state, regional, and local agencies and communities when identifying diversion impacts and mitigations associated with pricing.

2. Use a data-driven approach to define and identify diversion impacts both during and after implementation of pricing programs and projects; monitor with real-time data after implementation.
3. Evaluate localized impacts of diversion including factors such as VMT per capita, VMT per capita in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
4. Context-specific monitoring and evaluation programs should be conducted by implementing agencies in coordination with partner agencies and be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
5. Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
6. Reinvest a portion of revenues into areas affected by diversion caused by pricing programs and projects.

**Pricing Policy 5. Climate and Air Quality: Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.**

[Placeholder for background/context]

**Action Items:**

1. Set rates for pricing at a level that will reduce greenhouse gas emissions and improve air quality by managing congestion and reducing VMT per capita on the priced system and in areas affected by diversion.
2. Identify localized air pollutants and greenhouse gas emission impacts due to pricing and identify strategies for mitigation.
3. Reinvest a portion of revenues from pricing into modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT per capita reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
4. Develop and implement pricing so that it addresses and supports the RTP's Climate Smart Strategy policies, including through the Congestion Management Process.

**Pricing Policy 6. Technology and User Experience:** Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

[Placeholder for background/context]

**Action Items:**

1. Coordinate technologies and user-friendly designs across pricing programs and projects to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
2. Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
3. Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.

## DEFINING KEY TERMS

Key terms will be included in the RTP glossary.

**Pricing:** Motorists pay directly for driving on a particular roadway or for driving or parking in a particular area. 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. Pricing within the Portland metropolitan context could include 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 pricing can be implemented in coordination with each other to provide greater systemwide benefits. Pricing can be implemented at the state, regional, or local level.

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

**Road Usage Charge / VMT Fee / Mileage Based User Fee:** Motorists are charged for each mile driven. A road usage 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 usage 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. Additionally, flat rate tolling cannot be used for congestion pricing programs or projects authorized by the Value Pricing Pilot Program or Section 166 on interstate highways under Federal law.

**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 with the discretionary concurrence by the U.S. Secretary of Transportation. See [https://ops.fhwa.dot.gov/congestionpricing/value\\_pricing/](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, or whether they divert to or from the priced facility.

## Update other RTP Goals and Objectives, and Chapter 3 sections to include 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 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 by increasing transportation options, managing congestion, and reducing VMT per capita consistent with regional VMT per capita reduction targets. ~~manage vehicle congestion and encourage shared trips and use of transit.~~
- **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, but not limited to, reducing vehicle speeds .
- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT per capita, and increasing transportation options through investments in transit services and increased access to transit and bike and pedestrian infrastructure. ~~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, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT per capita ~~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~~ 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**
    - **Pricing strategies**
      - Roadway Pricing, including:
        - ◇ ~~Peak period~~ Variable rate or time of day pricing
        - ◇ Managed lanes
        - ◇ High occupancy toll (HOT) lanes
      - Road Usage Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)
      - Parking Pricing and Management
      - Cordon Pricing

## Review Chapter 8: Moving Forward Together for future updates

In the 2018 RTP, Section 8.2 identified mobility corridors recommended for future corridor refinement plans. The descriptions of many of these corridors referenced pricing in a variety of contexts and were unclear on how or whether pricing might help address the goals of the RTP. A comprehensive look at the corridor refinement planning work identified in Section 8.2: Planning and Programs is needed to recommend updates in a future round of review. Staff will also consider

what additional planning activities could be identified in Chapter 8 to address next steps for pricing at a regional level. This could include planning for a regionally coordinated pricing system, criteria for when pricing should be considered on a corridor or in an area, guidance for development and implementation of pricing, and/or system-wide cumulative impacts from multiple pricing systems,

**Continue development of the Finance Chapter of the RTP, including incorporation of pricing into the financial forecast**

This work is underway and will be shared with partners in Fall 2022.

**Continue to review other areas of the RTP, including Goals, Objectives, and system policies in Chapter 3 to identify appropriate locations to include policy language supportive of pricing.**

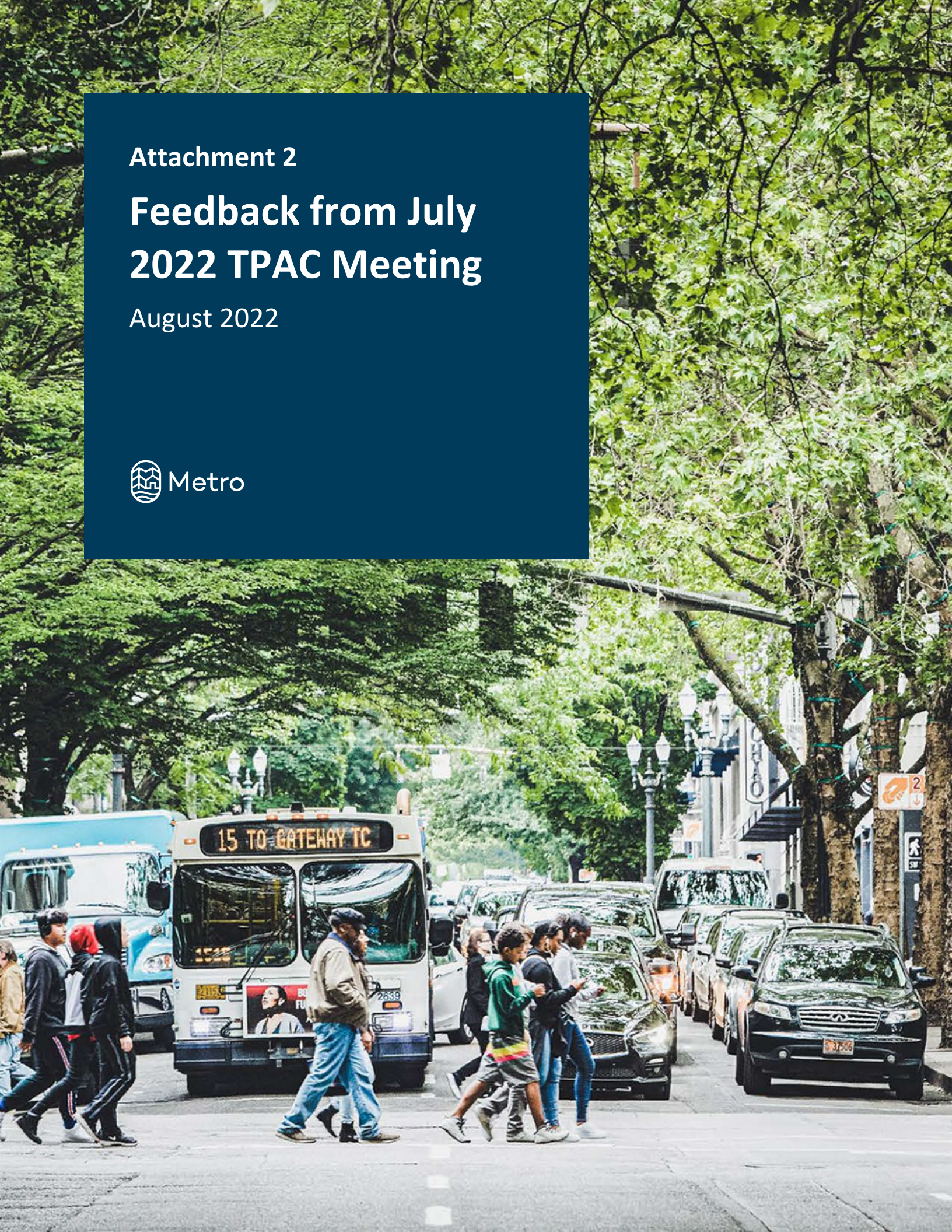
**Continue to coordinate with other pricing policy work at the state level, particularly the Oregon Highway Plan Toll Policy Amendment and the Oregon Transportation Plan update.**



Attachment 2

# Feedback from July 2022 TPAC Meeting

August 2022







This document summarizes the feedback on draft 2023 RTP congestion pricing policies that was collected from TPAC members following the July 13, 2022 TPAC meeting, identifying whether feedback has been addressed in revised language, will be addressed in future revisions, will be addressed in the pricing section of Chapter 3, or will be shared with other Metro staff for consideration as other 2023 RTP update work moves forward.

## **Feedback Across Policies**

### ***What We Heard***

- Update language –
  - Change references to agencies from “regional and local agencies and communities” to “relevant state, regional, and local agencies and communities”
  - Change general language from “congestion pricing” to “pricing” except when explicitly referring to pricing intended to manage congestion, and update related definitions
  - Change from “VMT” to “VMT per capita” where relevant
  - Change from “net revenue” to “revenue”
  - Change “local partners” with “jurisdictional partners”
  - Change references to modal alternatives to more clearly specify meaning
- Connect lessons learned from RCPS to the policies
- Include a description under each policy to provide context and connection to the RCPS
- Provide more clarification on types of pricing and when jurisdictions might implement them
- Remove references to specific data or geographies
  - Regional High injury corridors
  - Equity Focus Areas
- Remove references to local roads when not specifically referencing a local functional classification
- Clarify references to areas impacted by pricing and remove references to within one mile of a priced facility
- Clarify programs and projects to ensure they are differentiated

### ***How / When We’re Addressing***

- Language updates have been made for regional and local agencies, pricing, VMT, net revenue, jurisdictional partners, and specify modes and modal alternatives

- Language about areas impacted by pricing programs or projects, including references to local roads, has been updated to provide more clarity yet remain flexible.
- Added definitions to clarify the difference between pricing programs and pricing projects. Made references to pricing programs and projects more consistent throughout the document.
- Introduction to pricing section of Chapter 3 addresses types of pricing and which agencies could implement.
- Additional descriptions after each policy will be added after the September committee meetings to provide helpful information and more explanation on policy intent, including connecting the policies back to the RCPS.
- Prescriptive references to regional high injury corridors and Equity Focus Areas have been removed or altered to address feedback and provide more flexibility.

## **Structure of Action Items**

### ***What We Heard***

- Consolidate actions as one section beneath all of the policies to remove redundancies across the lists of action items
- Provide more clarity on timing and responsibility of actions
- Number the action items

### ***How / When We're Addressing***

- Action items have been changed from bullets to numbers
- Action items will continue to be nested under the policy statements to keep consistency with other sections of Chapter 3 of the RTP. A callout box in the introduction to Chapter 3 will be developed after the September committee meetings to further address why some system policies in Chapter 3 have actions and some do not, and to clarify how actions and policies relate to the goals and objectives in the RTP.
- Action items are intended to be flexible and provide direction on how policies can be met; they are meant to apply across different types of pricing programs and projects, specifics about timing and responsibility will be unique to each application.

## **Revenue Reinvestment**

### ***What We Heard***

- Create more specificity around revenue reinvestment for mitigation versus reinvestment in the system
- Include revenue reinvestment as its own policy.



- Provide more guidance on the amount of revenue invested in different areas.

### ***How / When We're Addressing***

- Specific changes to revenue action items have been made where relevant.
- Revenue reinvestment has not been separated into a new policy; the revenue reinvestment action items remain under each existing policy as appropriate.
- Revenue reinvestment has been included as a section in the chapter introduction. This will include a table that provides examples of how to reinvest revenue. Specific revenue reinvestment strategies will need to be tailored to each pricing program and project.

## **Mobility Policy**

### ***What We Heard***

- Policy definition should clearly define the purpose of mobility and the importance of the transportation network and programs. Modify language to include improving reliability, and be more specific about what “modal alternatives” means.
- Discuss how transit is coordinated around pricing projects. Ensure that the pricing revenue is directed to help address impacts from pricing.
- Eliminate the requirement that pricing leads to VMT reduction on the priced facility. Congestion pricing is to reach a congestion performance and overall emissions, not necessarily VMT.

### ***How / When We're Addressing***

- Policy language was updated to clarify the purpose of the policy.
- “Modal alternatives” has been replaced with specific references to transit, biking, and walking.
- Policies and actions have been updated to clarify coordination with transit and reinvestment of revenues in transit-supportive investments.
- Reduction of VMT remains in the language, consistent with state and regional goals around mobility, and other related work. For example, EMAC recommended action #1 includes reducing VMT per capita, and the OHP toll policy amendment policy 6.4.A calls for road pricing to encourage VMT reduction.

## **Equity Policy**

### ***What We Heard***

- Change from “integrate equity” to “center equity” in the policy.
- Consider not only the inclusion of equity at the outset, but ensuring impacts are equitably distributed across the population.

- Outreach for exemptions and discounts should be targeted to areas with shares of people with low-income and people of color.
- Adjust references to eligible populations for discounts and exemptions.
- The policy should encourage evaluation but not guarantee exemptions or discounts.
- Intertwine the structure of EMAC and POEM and how they were used to add ODOT pricing and Portland pricing respectively.
- Add something specific about designing enforcement so that it doesn't add additional burdens (i.e. have income based ticket amounts or options to address fines that people may not be able to pay)

#### ***How / When We're Addressing***

- Changed the start of the policy from "Integrate Equity" to "Center Equity"
- References to eligible populations for discounts and exemptions have been adjusted.
- Language has been added to specify targeted outreach.
- The inclusion of exemptions and discounts as part of a progressive fee structure remains in the updated language. Both EMAC and ODOT's low-income toll report recommend exemptions or discounts.
- EMAC and POEM will be referenced in the introduction to the pricing policy section of Chapter 3.
- An action item specific to enforcement has been added.

### **Safety Policy**

#### ***What We Heard***

- Reframe policy to include "and in areas affected by diversion"
- Add language to the effect of developing context specific monitoring and evaluation programs
- Specify that the evaluation should be conducted by the implementing agency
- Consider the difference between mitigation and long-term reinvestment

#### ***How / When We're Addressing***

- Language to specify where safety evaluation and mitigation measures should take place has been refined.
- Language regarding context specific monitoring and evaluation has been refined.
- Clarity about implementing agency responsibility for evaluation has been added

## **Diversion**

### ***What We Heard***

- Define a level of diversion which warrants evaluation.
- Change “diversion” to “rerouting”
- Clarify responsibilities for monitoring and evaluation.

### ***How / When We’re Addressing***

- Chapter 3 states that whenever diversion exists, it will be studied. The policies will not define a threshold at which diversion will need to be mitigated or addressed; that threshold will vary by project and program.
- The policy will continue to use the term “diversion,” which is defined in the document.
- The language on monitoring and evaluation has been revised to reflect need for implementing agencies to work with partners.

## **Climate Policy**

### ***What We Heard***

- Strengthen the language around air quality and on localized impacts that could result from diversion
- Include reliable and efficient travel times in action items
- Clarify references to climate goals and Climate Smart Strategy

### ***How / When We’re Addressing***

- Air quality has been added to the policy and action items.
- Policy does not indicate how much revenue should be spent on any particular project element and does identify areas where revenue should be spent.
- Reliable and efficient travel times are included in the mobility policy, and are not included in the climate policy.
- Language around climate goals and climate smart strategy has been refined.

## **Emerging Technology Policy**

### ***What We Heard***

- Change policy and action item references from “emerging technologies” to “technologies”
- Focus this policy more on user experience.

- Remove action items that are too specific related to the process of technology selection and reviews of existing laws.

### ***How / When We're Addressing***

- Reframed policy to focus on technologies and user experience.
- The last two action items have been removed.

## **Other Impacted Policies in the RTP**

### ***What We Heard***

- Create a greater connection between the Climate Smart Strategy policies and pricing
- Divide policy five of the Climate Smart Strategies policies into two policies to more clearly define pricing as a tool separate from technology.
- Explain how pricing is a tool support safety
- Remove changes to Safety & Security Policy 4, as they change the focus of the policy from reducing vehicle speeds overall to diversion.
- Regional policies do not reflect local needs for all roads and for expansion of the system.
- Consider merging the two identified Region Motor Vehicle Network Policies
- Do not implement pricing where there are not alternative options

### ***How / When We're Addressing***

- Climate Smart Strategies team will consider further refining policies to clarify and increase connection with pricing, and consider a new policy on pricing separate from technologies.
- Pricing supports safety through reducing VMT and reinvesting in alternatives to driving. It also supports safety through diversion mitigation strategies. These items have been more clearly defined and will be reiterated in policy introductions (to be written, see above).
- Removed changes to Safety & Security Policy 4.
- Regional Motor Vehicle Network Policies 6 and 12 have been slightly amended. The intent of these policies is not to restrict the ability for areas of growth from completing needed street network connections, but to include analysis on where pricing and other tools can replace or supplement capacity increases. The proposed language is consistent with other state and regional policy.
- Language related to the greater success of pricing in areas where transit service is already well established and is improved in conjunction with pricing has been added to the pricing section introduction.

## **Coordinated Approach and Vision**

### ***What We Heard***

- Further discuss the impacts of the congestion pricing policy and how we can create a regionally coordinated priced transportation system

### ***How / When We're Addressing***

- Discussions about a regionally coordinated priced system and further implementation guidance will be provided in Chapter 8 after the September committee meetings.

TPAC Feedback

# Clackamas County

July 2022



July 29, 2022

Alex Oreschak  
Alex.Oreschak@oregonmetro.gov

Dear Alex -

Thank you for the opportunity to provide comments related to the Metro Regional Congestion Pricing Policies. Attached is the Worksheet which contains specific recommended language changes to the Congestion Pricing policies and actions. This cover letter is to provide a high level overview of our concerns as well as to emphasize specific changes.

1. We support having a unique section in Chapter 3 to include policies specifically related to Congestion Pricing. This section should connect the lessons learned from the Regional Congestion Pricing Study (2021) to the policies. The Background should describe the types of potential pricing and must be clear who will have jurisdiction over these different types of pricing and the revenue that is generated. In addition, it should include discussion about how and when the various agencies should use these policies to guide their programs.
2. While we support the concept of the six specific policies, we have included proposed edits several of the policies. The edits simplify the policies as well as removed any “actions” that had been included within the policy statement. A description should be included under each policy, providing some context and connection to the Regional Congestion Pricing Study.
3. All **Actions** need to be grouped together at the end of the **Policies**. This will remove duplication, improve clarity and add emphasis. As a part of these edits, we recommend removing specific references to Metro Equity Focus Areas and the Metro High Injury Corridors as tools for direct funding. Equity and safety should be specifically addressed within the context of the Congestion Pricing program, and specific investments should be identified within that context. Overall, the **Actions** should be simplified, and should include information on when they should be used.
4. With respect to the updates to the other RTP Goals and Objectives, staff has the following comments:
  - a. Goal 4 Objective 4.6 – The addition of “support additional development in 2040 growth areas” does not fit with the category of “reliability and efficiency.” Those words should be removed.
  - b. Safety and Security Policy 4 – The addition of the language to pricing is confusing and creates a complicated sentence. It takes a policy that had originally been focused on “reducing speeds” as a tool to address safety, but then adds in minimizing diversion from priced facilities. Perhaps a completely separate policy is needed.



- c. Regional Motor Vehicle Network Policies (3.5). It is difficult to review these policies outside of the context of the other existing policies. Proposed language changes to the recommended edits are below
  - i. Policy 6 – The initial proposed edits change language from “consider” to a more directive word of “use”. The reference to Policy 12 is unnecessary. Clackamas County proposes this language: *“Consider use of congestion pricing to manage congestion, reduce VMT and raise revenue when one or more lanes are being added to throughways. Transit service and facilities for alternative modes should be available and be improved with the implementation of congestion pricing.”*
  - ii. Policy 12 – The proposed changes to Policy 12 are unnecessary for implementation of the Congestion Pricing policies. We recommend that no changes be made to Policy 12.

Thank you for this opportunity to comment during the development of these important policies. We look forward to continuing to engage and provide additional input at future TPAC and JPACT meetings.

Sincerely,

*Karen*

Karen Buehrig

Long Range Planning Manager  
Clackamas County

## Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Agency name: Clackamas County – Long Range Planning staff

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

### Comments on Section 3.2.5 Congestions Pricing Policies

#### For the Background section,

- discuss that there are various types of "Pricing" extending from Tolling that is used to fund specific infrastructure to Congestion Pricing that can be applied in a variety of ways, Cordon, Parking, Roadway and VMT.
- It is important to emphasize that depending on what is being priced, there are different owners of facilities and various organizations that will be making decisions on how to use the revenues. The table created by Alex is helpful.
- Describe when, where and how the policies should be used, especially in light of the various types of pricing. Describe how these policies fit with the State guidance and projects on the Interstate and Highways. Talk about how Portland, and other jurisdictions use pricing.
- Add description that Roadway pricing - Tolling is primarily used to raise revenues to pay for roadway improvements, which is diferent from Congestion Pricing.

The various Chapter 3 Policy Sections do not all have Actions associated with each Policies. The list of Actions is significant detail and should be shortened. Group the Actions together at the end of the section to avoid repetition and to be more direct.

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What specific changes would you like to see to improve the proposed policy language?

### 3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

Need to be clear on what types of pricing projects this should apply to – regional projects vs parking policy.

Discuss roadway pricing – Tolling and Congestion pricing. Focus of this policy is on Congestion Pricing

July ~~15~~<sup>29</sup>, 2022

## Revised Draft Congestion Pricing Policy Language Worksheet

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.

There should be additional description after the Policy and before the actions, describing when, where and how the policies should be used, especially in light of the various types of pricing.

For example, with Congestion Pricing Policy 1 Mobility, Describe how this implements the Oregon Highway Policy interest in setting desired outcome, and that achieving multiple outcomes is difficult. The types of actions that influence improving mobility include rate setting, investment of revenues, working together with the various impacted jurisdictions, construction/investment in various modes of travel, and non-infrastructure investments.

What are the unique items that should be thought about when organizations are pricing parking, using the cordon or pricing via VMT?

I have added some SAMPLE language under each policy (highlighted in yellow).

Consider grouping the Actions together. There isn't a need to have actions under each policy.

#### Policy 2: Equity

Describe how EMAC was used for ODOT pricing and POEM for input into Portland Pricing. Use the area to describe the type of input/direction the committees should provide.

Some of the Action are more applicable to roadway pricing than other types of pricing.

It is difficult to prescribe that the organizations use the Metro Equity Focus Areas as the groups to look at because they will be driven by their own organizational direction. Instead of repeating the EMAC recommendations, should it just focus on having an Equity group and their recommendations?

I have used the "Comment" function to provide comments to the changes to the other policies in the document (at the end of this document).

## Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing Policies:** ~~the outcomes of a congestion pricing project or program should:~~

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- Policy 1** **Mobility:** ~~Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives and addressing system deficiencies, 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 are designed to 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 ~~created by pricing programs and projects prior to implementation and throughout the life of the pricing project. 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 TechnologiesUser Experience:** Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

## Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing Policy 1.** Mobility: Improve reliability and efficiency, reduce VMT, and increase transportation options through investments in modal alternatives and addressing system deficiencies.

Congestion pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 Regional Transportation Plan, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes. However, it depends how pricing is implemented in the region. The Metro Regional Congestion Pricing Study (July 2021) outlines specific considerations for each type of congestion pricing.

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Defining clear goals and outcomes from the beginning of a pricing program is essential. 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.

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Congestion pricing programs are designed to shift trips to reduce congestion at certain times on a facility. These trips could be shifted to different times of day on the same facility, onto other roadways, to other modes or potentially cause a person not to take the trip at all.

Transit and other modal options should be established and in place before a congestion pricing program is implemented. An assessment should be conducted to understand the viability of mode shift before the determination is made to implement a congestion pricing program.

In addition to demand management, congestion pricing raises revenues. Expenditure of the revenues, including maintenance and investing in system deficiencies, is central to the development and on-going implementation of the program.

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

Congestion pricing strategies have the potential to improve racial equity and benefit marginalized communities as well as all residents of the region. Congestion pricing tools have the potential to be more flexible than current funding in how funds are collected and what funds are spent on.

A significant factor of whether a congestion pricing program improves equity is how the program is designed-- how people are charged and how revenue from congestion pricing strategies is spent. A pricing program with the same charge can improve or harm equity depending on how it deals with affordability, the places it improves, and the type and locations of investments.

To ensure equitable I-205 and I-5 toll projects and processes, and to help develop a framework, ODOT convened an Equity and Mobility Advisory Committee (EMAC). 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

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## Revised Draft Congestion Pricing Policy Language Worksheet

management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects.

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In providing input to the Oregon Transportation Commission, the committee considered the needs and opportunities for achieving community mobility and equity priorities as part of the National Environmental Policy Act process for toll implementation. EMAC has advised on the equity foundation of ODOT's toll projects, including guidelines, strategies and processes.

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POEM provided input to PBOT and BPS on prices for parking, vehicle-based commercial services, highway tolling, cordons or areas pricing, and road user or per-mile charges.

Both EMAC and POEM are examples of how equity can be integrated into pricing programs from the outset. These groups are essential to the creation of pricing programs and projects and ongoing monitoring throughout implementation.

**Congestion Pricing Policy 3. Safety:** Be designed to address traffic safety and the safety of users of all modes, both on and off the priced system.

When Congestion Pricing programs are implemented there is opportunity to improve safety on the priced facility due to managing the flow of traffic through pricing. Adjacent and other roadway facilities may experience a change in usage due to congestion pricing. Investments to address safety for the traveling public should be implemented at the same time as congestion pricing is implemented.

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**Congestion Pricing Policy 4. Diversion:** Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing project.

Roadway pricing has mixed results at a regional level of reducing VMT and reduced delay on the charged roadways coupled while creating increased delay to nearby non-charged roadways. Burdens and benefits were not uniformly distributed and could disproportionately impact travelers that live on the outskirts of the region, near the priced facility.

Areas further from priced roadways tend to experience worse access to jobs by auto. With fewer options of using the faster tolled roadways and competing with traffic on arterials that diverted from those tolled roadways, commuters here experienced somewhat slower travel by autos and transit. A roadway pricing program should focus on the impacts to delay on the throughways charged as well as the impacts to nearby non-charged roadways. Impacts at a localized scale would need to be examined to understand if there were investments (such as transit, bike, or pedestrian improvements) that could

## Revised Draft Congestion Pricing Policy Language Worksheet

improve overall performance. In addition, the travel costs should be assessed at a granular scale to understand the impact on vulnerable groups.

Diversion from currently congested facilities occurs today, and part of the intention of congestion pricing is to address this original diversion, as well as to identify addition diversion that may be created by the priced facility.

**Congestion Pricing Policy 5. Climate:** Reduce greenhouse gas emissions and vehicle miles travelled (VMT) while increasing access to low-carbon travel options.

In the Regional Congestion Pricing Study, the various types of congestion pricing have a range of success at reducing greenhouse gas emissions and VMT.

The use of cordon pricing was shown to result in relatively high mode shift to transit, indicating that The use of cordon pricing was shown to result in relatively high mode shift to transit, indicating that

Cordon design considerations could include expanding the cordon area to encompass more origins and destinations, pairing cordon pricing with roadway pricing on key facilities near the cordon, providing a time-of-day charge, or providing discounts or exemptions for groups that would be disproportionately impacted. Improvements to arterials near the cordon to speed transit (such as bus only lanes) could also be considered.

Overall, parking charging demonstrated positive results for all metrics at a regional level. The analysis shows that charging for parking could increase transit ridership – likely a direct result of charges generally being assessed in areas with good transit service and high employment. Charges were concentrated among fewer travelers compared to the VMT scenarios. While the total travel cost was low compared to other pricing scenarios, the cost to the individual drivers who parked was relatively high.

**Congestion Pricing Policy 6. User Experience:** Coordinate technologies and pricing programs to create an integrated transportation experience for the users of the system.

A Vehicle Miles Traveled (VMT) program could build off of the OReGO pilot but a major implementation barrier is enforcement and mandating vehicles to participate. A pilot phase might make sense for the Portland region to trial one or more technologies before scaling up to a region-wide system. Congestion Pricing through VMT has been demonstrated to perform well on all metrics at a regional scale, largely because all driving trips would be charged. While total travel cost would be the highest among the pricing tools studied, but those costs would be the most widely distributed compared to other pricing options.

A VMT pricing program should consider whether drivers who would pay more have viable alternatives to driving, and could focus on investments (transit, pedestrian, or bicycling infrastructure) or provide discounts or caps on charges for groups that would be disproportionately impacted, either because of where they live or their ability to pay.

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## Revised Draft Congestion Pricing Policy Language Worksheet

In addition to VMT programs, User experience needs to be central to all congestion pricing programs. Coordination of the tools used in programs in others states, as well as other locally implemented projects and programs is essential.

### ACTIONS

- Establish equity advisory groups, including people with low-incomes, and people of color in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
  - Conduct accessible, equitable public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology.
  - Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
  - 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).
- Collaborate with regional and local agencies and communities when:
  - Setting, evaluating, and adjusting mobility goals.
  - Identifying traffic safety and diversion impacts and mitigations.
  - Setting rates and determining revenue allocation
  - Long term oversight of the congestion pricing programs
- Since shifting trips to a different time of day or mode of travel is central to congestion pricing, the completion of an assessment of the project area to understand the viability the various modes of travel should be conducted to inform the decision to implement a congestion pricing program.
- Support the Climate Smart Strategy policies by:
  - Evaluating localized impacts including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- For a congestion pricing program to be successful, a plan needs to be developed for how reinvestment of a portion of net revenues and should include the following areas:
  - Modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
  - Programs and projects to address safety and diversion issues caused by pricing projects.

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## Revised Draft Congestion Pricing Policy Language Worksheet

- Non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives.
- When participating in setting rates, identifying exemptions and discounts for congestion pricing programs, work to achieve:
  - Congestion management while reducing overall VMT in the project area.
  - Reduction of emissions
- Implementation, monitoring and evaluation programs should be on-going and transparent.
  - Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups who were involved in the co-creation process, community members, and local decision makers.
  - Monitor both priced and unpriced facilities, including diversion impacts, using real-time data after implementation. Adjust strategies and programs based on monitoring and evaluation findings.
  - Coordinate with other existing and proposed pricing programs and technologies for payment systems to reduce burdens on the user.
  - Varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

## Revised Draft Congestion Pricing Policy Language Worksheet

### 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).

## Revised Draft Congestion Pricing Policy Language Worksheet

**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.

## Revised Draft Congestion Pricing Policy Language Worksheet

**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/](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, and maintenance of the transportation system,

**Commented [BK1]:** I dont think this is correct. I dont think that Pricing is a tool that should be used to increase safety.

## Revised Draft Congestion Pricing Policy Language Worksheet

with a focus on reducing vehicle speeds |

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- **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

**Commented [BK2]:** I don't agree with this language

**Commented [BK3]:** These changes do not related to congestion pricing.

**Commented [BK4]:** I do not agree with this change. We should keep the existing language.

TPAC Feedback

# Clackamas Cities

July 2022



# Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Name: Clackamas Team TPAC

Note: Cities of CTAC were invited to co-edit worksheet.

## Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

- Policies should be grounded in how they relate to the Regional Congestion Pricing Study, and how they can be applied to the build out of 2040 centers (including planned road infrastructure, e.g., urban expansion areas).
- The current policy focuses heavily on roadway pricing. Consider implications for VMT pricing, geographic-based pricing, time-of-day pricing, and other types of pricing. How do we interface with those types of programs?
- Consider the manageability of exemption programs.
- Since metro is not a decision maker on revenue investment, how is revenue investment influenced by these policies.
- Contemplate deeper coordination measures.
- Pricing certain facilities and not others is inequitable. Is there any talk about weaving congestion pricing into a VMT program to replace the gas tax? Is there a nexus to OreGo?
- The current policy language focuses heavily on motorists, but we have a vibrant, changing transportation system. It may be groundbreaking for the RTP to briefly contemplate the applicability of pricing to future travel contexts, such as riverway travel, local airspace travel (drone deliveries) and site-specific pricing (e.g., Multnomah Falls).

## What specific changes would you like to see to improve the proposed policy language?

- The proposed Metro Congestion Pricing Policy and Oregon Highway Plan Toll Amendment have conflicting diversion definitions.
- Clarify that the definition for "diversion", as used in the congestion pricing policy, only pertains to congestion pricing policy.
- Consider not only the inclusion of equity at the outset, but ensuring impacts are equitably distributed across the population.



# Revised Draft Congestion Pricing Policy Language Worksheet

## 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

- |                 |  |
|-----------------|--|
| <b>Policy 1</b> | <b><u>Mobility:</u></b> 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. |
| <b>Policy 2</b> | <b><u>Equity:</u></b> Integrate equity and affordability into pricing programs and projects from the outset.   |
| <b>Policy 3</b> | <b><u>Safety:</u></b> 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.  |
| <b>Policy 4</b> | <b><u>Diversions:</u></b> Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.   |
| <b>Policy 5</b> | <b><u>Climate:</u></b> Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.  |
| <b>Policy 6</b> | <b><u>Emerging Technologies:</u></b> Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.  |

# Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing 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.**

## Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

## Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel

# Revised Draft Congestion Pricing Policy Language Worksheet

time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

**Congestion Pricing 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.**

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

**Congestion Pricing 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.**

Action Items:

# Revised Draft Congestion Pricing Policy Language Worksheet

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

## **Congestion Pricing 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.**

### Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

### Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

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- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

# Revised Draft Congestion Pricing Policy Language Worksheet

## 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).

# Revised Draft Congestion Pricing Policy Language Worksheet

**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.

# Revised Draft Congestion Pricing Policy Language Worksheet

**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/](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,



# Revised Draft Congestion Pricing Policy Language Worksheet

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

TPAC Feedback

# Multnomah County

July 2022



## Transportation Planning and Development

TO Alex Oreschak, Metro

CC Jessica Berry, Transportation Planning and Development Manager  
Sarah Paulus, Transportation Policy Analyst  
Jon Henrichsen, Transportation Division Director/County Engineer

FROM Allison Boyd, Senior Planner

DATE August 2, 2022

RE: Revised Draft Congestion Pricing Policy Language

Thank you for the opportunity to review and discuss the revised draft presented to TPAC on July 13th. Below are some comments and suggestions to your two questions as you further refine.

### **Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?**

#### Coordinated approach and vision

A gap that we would like to see more discussion on is how the congestion pricing policy can set the stage for more system planning of what a regionally coordinated priced transportation system might look like. Currently the policies are focused on a project by project application of pricing. We think a next phase to the Regional Congestion Pricing Study that should be described in this RTP update is to develop criteria for what would make a good candidate for a priced facility, identify potential corridors and conduct analysis to better understand system-wide impacts and benefits as more pricing comes on line and what the cumulative impacts will be to users of the system and economic centers. This would help, for example, to determine how much a priced system could assist in meeting our climate goals, where there are alternative transportation improvements needed for mode shift that may not be easily funded through pricing revenues on a project by project basis, and how coordination can occur for equitable implementation.

#### Revenue Generation

Another gap in the policy is acknowledging that a driving factor of some, or even most pricing projects, is likely to be to raise revenue. The advice of the expert panel to make the primary purpose of pricing projects to reduce congestion is ideal, but the reality is that ODOT has determined that they need

### Transportation Planning and Development

tolling revenue to implement their major projects and local agencies in the region also have significant revenue needs that pricing could potentially help them meet. For instance, we're currently discussing in this RTP update that we do not have enough funding to address all of the critical safety needs on arterials in the region. In addition, local agencies such as Multnomah County, have identified funding shortfalls for capital projects and effective asset management. New sources of revenue are needed in the region and tolling, road user charges, and parking pricing are some of the tools that can help mitigate these funding needs. It will be important that the policies guide how agencies can meet their revenue objectives while also setting rates and reinvesting to meet the mobility, climate, safety, and equity goals of the RTP policies. Currently the policies seem to be almost working in isolation and may make balancing the many desires for pricing difficult in implementation.

#### Pricing unrelated to congestion

The policies, as written without additional context from the narrative, aren't clear if they only apply to pricing projects that are focused on managing an identified congestion problem or also apply to more traditional pricing that is not in response to congestion but to raise revenue for necessary capital improvements, maintenance, and operations, e.g. a bridge toll or the road user charge proposed to replace gas tax revenue. We recommend being more explicit about the types of pricing projects the policies apply to and tying this to the definitions.

#### Local pricing projects vs. projects of regional significance

We also would like to see more clarity on when a pricing project would need to be included in the RTP project list and what might be done at a local level. Some of the draft policies that focus on process seem to assume projects with a large budget such as the ODOT projects that include NEPA phases and have equity committees, however, not all projects may be of this scale.

### **What specific changes would you like to see to improve the proposed policy language?**

#### Revenue reinvestment

Language should reflect that there may not be authority to reinvest net revenues in some of the identified areas for every pricing project, e.g. "off the facility", on transit improvements, or in equity focus areas if not adjacent to the facility.

The actions to reinvest "a portion of net revenues" do not set specific expectations or criteria for projects. There are several different areas to reinvest in as well as considerations for rate setting which may split net revenues into very small slices. Who would decide if the allocated revenue portion is

### Transportation Planning and Development

adequate? What if there isn't enough net revenues to apply to each policy area? To be effective, there could be targets or a process for coordination in determining reinvestment allocations.

Some of the actions refer to reinvesting net revenues for purposes of managing safety issues or diversion; however, there is also direction to mitigate these impacts. Clearly separating mitigation actions, which would be an expense of the program, from net revenue reinvestment would provide more certainty that some of these issues are addressed.

#### Mobility

Coordinating transit needs around pricing projects could have the unintended consequences of redirecting transit investments from areas of the region that are not adjacent to a pricing project, e.g. HCT corridors mentioned in Action 4. With constitutional restrictions and potential for narrowly defined corridors, this could mean that the pricing revenue is not paying for transit improvements that are necessary to mitigate the impact of the pricing projects but that instead is coming out of funding that is also needed in, and could be spent in, multiple locations that have identified gaps in transit access or efficiency and reliability that are not related to a pricing project.

#### Equity

The equity process actions could require a large budget to implement fully and effectively. Not all pricing planning will be as well funded as the ODOT tolling projects. How can these process actions be met while scaling for different project capabilities? Equity outcomes should be clearly identified in addition to processes for achieving consistency among different projects, and who may be participating in them.

Equity Action 3 calls for using a consistent definition and methodology. Will the RTP update include a future project to develop this?

Equity Action 5 calls for basing eligibility for a progressive fee structure on population categories such as identifying as a person of color. We don't believe eligibility would be able to be set based on race and recommend that you reword this policy so that eligibility is based on low-income users and encourages/identifies methods to increase enrollment in communities of color.

#### Safety and Diversion

As mentioned above Action 5 under Safety and Action 6 under Diversion, we believe you should consider the difference between mitigation and long-term reinvestment. Addressing issues caused by

### Transportation Planning and Development

the pricing projects as currently drafted in these actions should be required mitigation. Reinvestment goals, for safety in particular, could include safety improvements in the community that are not directly caused by the project.

#### Climate

How will Climate Action 1 be balanced with other rate setting goals such as revenue and affordability while still ensuring the emissions reductions that will help us meet our regional goals?

Climate Action 2 says to consider local emissions impacts. We are assuming this is referring to air quality and health impacts that could result from diversion. This should not be a consideration but a requirement for evaluation and mitigation.

#### Emerging Technologies

Coordination among pricing projects related to emerging technology and reducing burdens on the user is a good action. A similar action to coordinate cumulative impacts and mitigation between projects would be a good addition to the equity actions as well since it may extend beyond technology considerations.

TPAC Feedback

**ODOT**

July 2022





## Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Agency name: ODOT

General comments:

- The Oregon Transportation Plan and Oregon Highway Plan (OTP and OHP) document the statewide policies for regional, county, and city transportation policies and plans. RTP policies and actions should be updated to be consistent with the OTP and OHP.
- The legislature designated the OTC as the toll authority to set toll rates and policies for state highways and bridges in Oregon. There will be a process to determine toll rates and investments from revenue generated from tolls. It's premature to indicate how much and where the revenue will be spent. This applies to all the policies.
- Keep RTP policies as high level guidance to facility owners so they can tailor operations to best address potentially competing needs.
- The policy outcomes should result in choosing the transportation facility, mode, and time that is most appropriate for the trip.
- Consider changing "diversion" to "rerouting" in instances that refer to "diversion" as inflicting negative impacts, since some types of diversion are good.
- The RTP must make room for a large range of possible congestion pricing tools and goals and not proscribe. Future RTPs can refine them.
- Many goals naturally compete, such as mobility targets vs. diversion. In that light, the and/or approach is more appropriate than a demand list.
- Congestion pricing policies need to focus on demand and congestion management. A preference for POEM, RMPP, etc. to encourage transit is appropriate, but a hard policy that requires financial support of transit is not.
- Refine definitions to be consistent with national practice and update definitions to clarify that Road Usage Charge/VMT Fee/Mileage Based User Fee are not congestion pricing innately but can be varied by time of day/location to be considered congestion pricing.

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Policy 4 can more directly and clearly address concern related to traffic volume increases on non-tolled routes (i.e., diversion resulting in vehicle trip rerouting).

Policy 6 can be retitled to focus on desired outcome (Integrated User Experience) rather than reference to tools to achieve it (Emerging Technologies).

See revisions in track changes and comments below for additional items to address.

## Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

**Policy 1:**

- Eliminate the requirement that pricing leads to VMT reduction on the priced facility. Congestion pricing is to reach a congestion performance and overall emissions, not necessarily VMT.

**Policy 2:**

- Equity Focus Areas is not an industry standard used in the region.
- The policy should encourage evaluation of opportunities but not guarantee that there will be exemptions/discounts in every application.

**Policy 3:**

- Reduction of vehicle trips does not equate to safety. This seems to better fit with the Mobility Policy.
- The amount of monitoring is significant. While monitoring is important, who is responsible for the action – doing the monitoring, and cost to address a future safety issue?

**Policy 4:**

- Limit potential for negative impacts due to motor vehicle traffic volume increases caused by rerouting of trips away from priced roadways to unpriced roadways before, during, and after pricing programs and projects are implemented, especially on the regional high injury corridors.
- The policy should address diversion impacts and effects resulting from implementation but not before implementation.
- It's unclear who is responsible for monitoring and addressing diversion issues. Indicate the level of diversion to be evaluated.

**Policy 5:**

- This is inconsistent with the OHP in that the OTC sets toll rates and policies for state highways and bridges. There will be a process to determine toll rates and investments from revenue generated from tolls. It's premature to indicate how much and where revenue will be spent.
- Rate setting to reduce VMT is different than pricing for congestion management and it's inconsistent with the OHP. Congestion pricing is to reach a congestion performance and overall emissions.

**Policy 12:**

- The RTP needs to be consistent with the OTP and OHP. Those plans are currently undergoing an update. We recommend discussion on RTP Policy 12 wait for draft OHP policies.
- Past RTPs have focused on completing the system. Draft Policy 12 walks back commitments ODOT has made.
- The proposed Policy 12 could prevent transportation projects that were a factor in approving zoning (TPR).
- It is not appropriate to strike "beyond the planned system of motor vehicle through lanes" to draft Policy 12 as that potentially invalidates all TSPs in the region.

See revisions in track changes and comments below for additional items to address.

# Revised Draft Congestion Pricing Policy Language Worksheet

## 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.

**Commented [BRT1]:** On diversion: We've tried to be specific about referencing rerouting instead of diversion, because not all diversion is "bad." In the context of the language in the policy, it seems like rerouting is what they are really trying to mitigate.

**Commented [WZN2]:** The climate policy appears to be an implicit endorsement of discounts or exemptions for Low Emission Vehicles (LEV). Is that the intention? Worth noting that providing LEV discounts or exemptions may have equity concerns related to income.

**Commented [SCR3]:** Policy 1: Reducing VMT does not improve mobility in and of itself. Either increased or decreased VMT must be further examined to determine what the overall effect is on mobility.

## Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing 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.**

Action Items:

- Set rates for congestion pricing at a level that will manage congestion on the priced facility while limiting rerouting to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.

**Commented [BRT4]:** Consider including Transportation Demand Management (TDM) programs.

**Commented [SCR5]:** Reducing VMT on a regional level can be good, however, reducing VMT on the freeway facility can have unintended consequences. Rerouting versus diversion has been emphasized due to this. With reduced congestion, some drivers will leave the freeway, but others may go back to the freeway due to the reduced congestion. Freeway driving tends to emit less CO2 than arterial driving and is considered safer, particularly from a pedestrian/bicycle standpoint. For this reason, VMT reduction on the freeway may not be desirable if congestion can be managed.

**Commented [SCR6]:** VMT reduction due to mode shift is a definite positive.

## Revised Draft Congestion Pricing Policy Language Worksheet

- Provide a progressive fee structure which includes exemptions, credits, or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

**Commented [BRT7]:** This wording doesn't seem quite right, unless we are missing something. The phrase "in one or more" categories may imply "identifying as a person of color" alone is enough to qualify which makes it race-based and that might not go over well.

**Congestion Pricing 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.**

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

**Congestion Pricing 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.**

Action Items:

- Collaborate with regional and local agencies and communities when identifying impacts and mitigations for identified traffic volume increases resulting from pricing projects.
- Use a data-driven approach to identify potential impacts due to traffic volume increases on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.

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- Evaluate localized impacts of traffic volume increases including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and traffic volume increase mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage traffic volume increases caused by pricing projects.

### **Congestion Pricing 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.**

#### Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from rerouting or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

**Commented [SCR8]:** Concerns with this were discussed in a previous comment on page 3.

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

#### Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.

## **Revised Draft Congestion Pricing Policy Language Worksheet**

- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.



## Revised Draft Congestion Pricing Policy Language Worksheet

### 3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

**Road Pricing:** Motorists pay directly for driving on a particular roadway or for driving or parking in a particular area. As a subset of Road Pricing, congestion Pricing includes pricing different locations using different rate types, such as variable scheduled 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 greenhouse gas emissions especially if there are other transportation options available or alternatives to taking the trip. Road 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 road pricing can be implemented in coordination with each other to provide greater system wide benefits. Road pricing can be implemented at the state, regional, or local level.

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

Congestion pricing almost never would be a flat rate – as the whole idea is to manage congestion throughout the day and every facility has a demand curve that is not consistent 24/7.

**Road Usage 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.

Cordon pricing does not need to be and often is not determined by where congestion exists, rather it is just a boundary of where it would apply.

**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.

Parking pricing is not a sub-set of Congestion Pricing – it needs to be separated into a different category of pricing.

**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).

**Commented [UD9]:** Changes below were previously communicated to Metro). Repeating these edits, with hope that they are considered, because the terminology use is not consistent with national practice.

OReGO now uses “Usage” instead of “User” for RUC.

**Commented [SCR10]:** In and of itself, Road User Charge / VMT Fee / Mileage Based User Fee are not congestion pricing. As discussed in the definition, they are an alternative to fuel taxes. These types of fees can be varied by time of day and/or facility so that they become congestion pricing.

## Revised Draft Congestion Pricing Policy Language Worksheet

**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. Additionally, flat rate tolling cannot be used for congestion pricing projects authorized by the Value Pricing Pilot Program or Section 166 on interstate highways under Federal law.

Flat Rate is a type of tolling application where you are paying for infrastructure but you don't have any need to manage congestion. Tolling can include variable rate for congestion pricing to help pay for the project and it is not limited to Flat Rate only.

**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. 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

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**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

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## Revised Draft Congestion Pricing Policy Language Worksheet

**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 with the discretionary concurrence by the U.S. Secretary of Transportation. See [https://ops.fhwa.dot.gov/congestionpricing/value\\_pricing/](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, or whether they divert to or from the priced facility.

[Indicate the level of diversion that warrants evaluation.](#)

### 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,

## Revised Draft Congestion Pricing Policy Language Worksheet

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, , 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 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**

- **Road pricing strategies**

- Congestion Pricing, including:
  - Peak period-Variable rate or time of day pricing
  - Managed lanes
  - High occupancy toll (HOT) lanes
- Road Usage Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)
- Parking Pricing and Management
- Cordon Pricing

TPAC Feedback

**PBOT**

July 2022



# Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Agency name: \_\_\_\_\_Portland Bureau of Transportation\_\_\_\_\_

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

We appreciate the incorporation of many of our suggested edits and additions/reformatting from our previous round of comments. And while we see some more explicit connection between the Climate Smart Strategy and pricing (especially in the last Action bullet under Congestion Pricing Policy 5), we would continue to emphasize our comments that the clearer we can be about how pricing will be a key move in Climate Smart Strategy that can meet the updated CFEC target for VMT reduction, the more likely we are to achieve a meaningfully actionable vision for the role of pricing in our region, with appropriate next steps documented in Chapter 8 and reflected in the funding strategy and projects, programs and policies included in this update. We have also recommended adding language in the equity Policy that acknowledges current inequities and says that pricing policy benefits and burdens need to be compared with the benefits and burdens of not implementing pricing, which is a key thing we heard from our POEM Task Force.

This raises a broader point about how to understand the Actions relative to the Policies, since this hasn't been a consistent approach across all of the Chapter 3 policy sections. Do they have the same force as the policy? If not, then we may need to rethink what counts as policy vs "nice to do" since there are some critical concepts, actions and policy operationalization steps included in those Actions that will be crucial to the success of pricing meeting supporting achievement of our regional goals and aligning with our regional values.

# Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

See the line item comments and suggested edits (highlighted since it was using the same color as your tracked changes) in the document below.

## 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.



# Revised Draft Congestion Pricing Policy Language Worksheet

## 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.

# Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing 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.**

## Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with impacted state, regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other jurisdictional partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

## Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The

# Revised Draft Congestion Pricing Policy Language Worksheet

methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.
- When considering implementing pricing and evaluating the distribution of benefits and burdens, compare pricing scenarios or options against the existing distribution of benefits and burdens of a scenario where pricing is not being used as other investments are proposed for the same facility or area.

**Congestion Pricing 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.**

## Action Items:

- Collaborate with impacted state, regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

# Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing 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.

## Action Items:

- Collaborate with impacted state, regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

**Congestion Pricing 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.


## Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies, including through the Congestion Management Process.

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

# Revised Draft Congestion Pricing Policy Language Worksheet

## Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries. 

# Revised Draft Congestion Pricing Policy Language Worksheet

## 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.

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**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).

# Revised Draft Congestion Pricing Policy Language Worksheet

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**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

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# Revised Draft Congestion Pricing Policy Language Worksheet

**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/](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,



# Revised Draft Congestion Pricing Policy Language Worksheet

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

TPAC Feedback

**TriMet**

July 2022



# Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Agency name: TriMet

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Address role of pricing as revenue generation tool. Suggest some potential language edits under the progressive fee structure. Made notes in text below.

We made some suggested edits to language in action items under Policies 1 and 2 to reference mobility options and technology.

What specific changes would you like to see to improve the proposed policy language?

If this language would also apply to other forms of pricing, such as RUC at a regional level or potential parking fees we may want to levy in the future, it should call that out. We would not want this language to inadvertently apply to TriMet fares or other fees we might levy.

Policy 4: possible inconsistencies in definition of diversion. By referencing local streets does not reflect arterials, connectors as above.

There are some overlaps between the policies and public engagement, revenue investment, ongoing monitoring seem to be included throughout since there are similar actions under each policy topic. I wonder if organizing them differently would reduce overlap.

Recommend numbering or lettering action items to make it easier to follow instead of bullets. Policy 1, Action A etc.

# Revised Draft Congestion Pricing Policy Language Worksheet

## 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

- |                 |  |
|-----------------|--|
| <b>Policy 1</b> | <b><u>Mobility:</u></b> 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. |
| <b>Policy 2</b> | <b><u>Equity:</u></b> Integrate equity and affordability into pricing programs and projects from the outset.   |
| <b>Policy 3</b> | <b><u>Safety:</u></b> 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.  |
| <b>Policy 4</b> | <b><u>Diversion:</u></b> Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.  |
| <b>Policy 5</b> | <b><u>Climate:</u></b> Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.  |
| <b>Policy 6</b> | <b><u>Emerging Technologies:</u></b> Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.  |

# Revised Draft Congestion Pricing Policy Language Worksheet

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

## Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT, and, when mutually agreed upon by regional partners, generate additional revenue, on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements, mobility infrastructure that supports transit- and walk-oriented development, and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

## Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities, all levels of access to technology, and languages other than English. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with

# Revised Draft Congestion Pricing Policy Language Worksheet

low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

**Congestion Pricing 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.**

## Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

**Congestion Pricing 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.**

# Revised Draft Congestion Pricing Policy Language Worksheet

## Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

## **Congestion Pricing 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.**

### Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

### Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.



# Revised Draft Congestion Pricing Policy Language Worksheet

- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

# Revised Draft Congestion Pricing Policy Language Worksheet

## 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).

# Revised Draft Congestion Pricing Policy Language Worksheet

**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.

# Revised Draft Congestion Pricing Policy Language Worksheet

**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/](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,

# Revised Draft Congestion Pricing Policy Language Worksheet

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

TPAC Feedback

# Washington County

July 2022



## Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov) and copy [marie.miller@oregonmetro.gov](mailto:marie.miller@oregonmetro.gov).

Agency name: Washington County

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

- Clarify that pricing is used to raise revenue and manage demand. The proposed policies focus on demand management only.
- Add context – this guides when, who and how would these policies apply to (eg private parking pricing?) – what is Metro's role in setting these policies
- Propose that they be presented as guidelines for establishing pricing programs by local or state entities, not directives.
- The policies need to be kept at a high level because there will be other processes to decide the purpose of the RUC, parking, cordon and roadway pricing programs. For example, road user charge can be an important source of revenue to supplement road fund and support operations and maintenance and not strictly a demand management tool.
- The term pricing programs **and projects** is not defined. Explain the difference; don't see the need to refer to projects – the rest of the RTP policies guides projects. Focus on programs here.
- Simplify the policy statements – some include both the what of the policy and how it is achieved. Save the 'how' for the action statements.
- Add guidelines for local and regional engagement in setting up pricing programs and monitoring/evaluating over time

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See the edits on the attached document.

General comments on pricing policies include:

- Consolidate actions – too much redundancy
- Have a separate section on net revenue and don't dictate priorities (eg HIC)
- Change emerging technology to user experience and administration
- Add policy on public engagement

Increasing 'access to' transit isn't good enough – need to be stronger on having transit options seen as part of pricing program – whether funded directly or from other source

Other Chapter 3 edits:

- Refer to VMT/capita; not VMT. With our growing region, VMT alone is not a good measure of progress
- Delete changes in Regional Motor Vehicle Network policies 3.5, policy 6 and 12.

July 15, 2022



# Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

## 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.

**Commented [CD1]:** Clarify these are intended to guide development of pricing programs – and for whom. RTP focus is on coordinating local TSPs – some of this seems like telling ODOT what to do. Add context for who/where/when these apply.

#### Congestion Pricing Policies

**Policy 1** **Mobility:** Reduce congestion, promote multimodal travel options and improve reliability and efficiency of the transportation system.

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~~ Improve traffic safety and the safety of users of all modes, both on and off the priced system.

**Policy 4** **Diversion:** Minimize diversion impacts ~~to nearby unpriced facilities including throughway, arterial, collector and local streets in the project area 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 by improving highway system performance and increasing use of transit and other modes ~~and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.~~

## **Revised Draft Congestion Pricing Policy Language Worksheet**

July 15, 2022

## Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing Policy 1. Mobility:** Mobility: Reduce congestion, promote multimodal travel options and improve reliability and efficiency of the transportation system.

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Action Items:

- Set rates for congestion pricing at a level that will reduce congestion and improve reliability on the transportation system while minimizing diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting toll or pricing rates.

**Commented [CD3]:** If this means goals for the pricing program, it should go into a section about how to set up a pricing program

**Commented [CD4]:** This belongs in the community outreach section – if the purpose is to identify the pricing goals.

**Commented [CD5]:** Have a separate section on net revenue, too redundant to describe separately

**Commented [CD6]:** These policies are about pricing programs, not projects. Other RTP policies guide projects.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined at local, regional or state levels associated with pricing program type) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and options for reinvestment of revenues.
- Develop a methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, The methodology should consider a variety of factors such as residential locations and destinations.
- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a fee structure which includes exemptions or discounts for qualified users. Base eligibility on low-income and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

**Commented [CD7]:** Recommend folding in general public engagement in this section or having a separate section if this focuses on equity only.

**Commented [CD8]:** Should be one but not only input in reinvestment

**Commented [CD9]:** This isn't possible. We have multiple approaches for defining equity areas today.

July 15, 2022

## Revised Draft Congestion Pricing Policy Language Worksheet

**Congestion Pricing Policy 3. Safety:** Improve traffic safety and the safety of users of all modes, both on and off the priced system.

### Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations associated with pricing
- Identify potential traffic safety impacts both during and after implementation of pricing projects and monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Evaluate and mitigate for impacts from pricing including changes in traffic from diversion and
- Evaluate and mitigate for impacts from pricing including changes in traffic from diversion and

**Commented [CD10]:** Is data-driven approach the same as real time data....

**Congestion Pricing Policy 4. Diversion:** Minimize diversion impacts to nearby unpriced facilities including throughway, arterial, collector and local streets in the project area

**Commented [CD11]:** Don't tie to regional definition of safety need – leave for local discretion and priorities.

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### Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to define and identify diversion impacts both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate impacts of diversion including factors such as increased congestion, travel time and reliability, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Distinguish between short and long trips and align mitigation with pricing program goals (eg parking, cordon, road user charge, roadway)

**Commented [CD12]:** We need to say how much is significant for diversion – but should be determined based on pricing program

**Commented [CD13]:** Why focus on local streets – should be all roads/throughways experiencing diversion

**Commented [CD14]:** Consolidate into a net revenue section

July 15, 2022

## Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 5. Climate and air quality: Reduce greenhouse gas emissions and vehicle miles travelled/capita while increasing use of low-carbon travel options

Action Items:

- Set rates for congestion pricing at a level that will support reliable and efficient travel times on the transportation system and reduce VMT/capita
- Identify localized greenhouse gas emissions impacts due to pricing and identify strategies for mitigation.
- Identify how congestion pricing can address and support the climate goals and objectives and Identify how congestion pricing can address and support the climate goals and objectives and Identify how congestion pricing can address and support the climate goals and objectives and Identify how congestion pricing can address and support the climate goals and objectives and

**Commented [CD15]:** Not needed words, since all policies apply to designing and implementing pricing program (create new section in background to say this)

**Commented [CD16]:** This is already covered in the diversion section

**Commented [CD17]:** This is already covered in the diversion section

**Commented [CD18]:** Move to net revenue section

Congestion Pricing Policy 6. User experience and administration make pricing a seamless experience and reduce administrative burdens

Action Items:

- Coordinate technologies across pricing programs to create an integrated transportation experience for the users of the system and reduce administrative redundancy through payment systems rate settings, discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after

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**Commented [CD20]:** Covered above

Actions:

- Allocate net revenue to support meeting the equity, climate and safety goals, mitigate diversion and improve the travel time and reliability performance of the transportation system.
- (move other net revenue actions here)

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July 15, 2022

## Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 8- Coordination and engagement: Establish public engagement process before, after and during the development and implementation of the pricing program to guide pricing program goals and objectives.

### Actions:

- Establish public input process tailored to the scale of the pricing program and its benefits and impacts.
- Solicit public input in measures needed to improve the transportation system and mitigate from diversion and safety impacts
- Commit to ongoing public input in evaluation and monitoring
- (more other coordination/engagement actions here)

## Revised Draft Congestion Pricing Policy Language Worksheet

### 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).

## Revised Draft Congestion Pricing Policy Language Worksheet

**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.



## Revised Draft Congestion Pricing Policy Language Worksheet

**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/](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/capita 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, transit use 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,

**Commented [CD22]:** How is pricing a tool to support safety?

## Revised Draft Congestion Pricing Policy Language Worksheet

with a focus on reducing vehicle speeds

- **Transportation Demand Management Policies (3.11)**

- **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT/capita, and increasing transportation options through investments in transit services, transit-supportive elements 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/capita 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 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

**Commented [CD23]:** Shouldn't be limited to local roads and diversion only.

**Commented [CD24]:** Important to highlight need for transit investments, not just access to transit

**Commented [CD25]:** Drop the changes here. Local's won't have ability to add new transit capacity or consider pricing in every new road improvement.

**Commented [CD26]:** Leave this in. We have to have a planned system – takes years for investment. Need an RTP with ongoing commitments.

**Commented [CD27]:** Regional policies don't reflect local needs for all roads. Eg – need for new road to support economic development or new UGB area or to add capacity on old rural road now serving urban needs

**Commented [CD28]:** Keep this in too

**Commented [CD29]:** Need to point out pricing as a strategy to raise revenue; not just manage congestion

**Commented [CD30]:** What about a bridge toll – pricing to raise revenue.



Attachment 3

# JPACT & Council Workshop #2 (July 28, 2022) Summary

August 2022









2023 Regional Transportation Plan update

# JPACT and Metro Council RTP Workshop 2

Developing Regional Congestion Pricing Policy

*A summary of the July 28, 2022 workshop about developing regional congestion pricing policy for the 2023 Regional Transportation Plan update.*

July 2022

# Meeting minutes

Meeting: JPACT & Metro Council RTP Workshop 2  
 Date: Thursday, July 28, 2022  
 Time: 7:30 a.m. to 9:30 a.m.  
 Place: Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221  
 Livestream: <https://youtu.be/-mF1lCXAWP8>; Telephone 877-853-5257 (Webinar ID: 831 1110 7022)  
 Purpose: Discuss Congestion Pricing Policy being developed for 2023 Regional Transportation Plan.  
 Outcome(s): Feedback on draft congestion pricing policies for 2023 RTP.

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## Attendance

### Members present

Councilor Shirley Craddick (JPACT Chair)  
 Councilor Christine Lewis (Deputy President)  
 Council President Lynn Peterson  
 Councilor Mary Nolan  
 Councilor Gerritt Rosenthal  
 Commissioner Nafisa Fai  
 Commissioner Paul Savas  
 Commissioner Jo Ann Hardesty  
 Mayor Travis Stovall  
 Kathy Hyzy (Milwaukie City Council President)  
 Rian Windsheimer  
 Sam Desue  
 Mayor Anne McEnerny-Ogle  
 Carley Francis  
 Emerald Bogue

### Alternates present

Michael Orman

### Members excused

Councilor Duncan Hwang  
 Commissioner Jessica Vega Pederson  
 Curtis Robinhold  
 Councilor Juan Carlos Gonzalez  
 Commissioner Temple Lentz  
 Mayor Steve Callaway

### Guest Speakers present

Esme Miller

Phillip Wu

### Affiliation

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

### Affiliation

Department of Environmental Quality  
 (DEQ)

### Affiliation

Metro Council  
 Multnomah County  
 Port of Portland  
 Metro Council  
 Clark County  
 Cities of Washington County

### Affiliation

City of Portland's Pricing Options for  
 Equitable Mobility Member  
 ODOT's Equity and Mobility Advisory  
 Committee

**Staff present**

Margi Bradway  
Kim Ellis  
Jaye Cromwell  
Amanda Pietz  
Garet Prior  
Alex Oreschak  
Brandy Steffen  
Camille Pearce

**Affiliation**

Metro  
Metro  
Metro  
Oregon Department of Transportation  
Oregon Department of Transportation  
Metro  
JLA Public Involvement  
JLA Public Involvement

**Observers present**

Chris Ford  
Brendan Finn  
Glen Bolen  
Mayor Julie Fitzgerald  
Councilor Baumgardener  
Tom Markgraf  
JC Vannatta

**Affiliation**

ODOT  
ODOT  
ODOT  
City of Wilsonville  
City of West Linn  
TriMet  
TriMet

## Takeaways

Below are the major themes based on the participants' comments and feedback during the workshop:

- The policies and strategies developed around congestion pricing should focus on equity and climate resiliency as primary objectives
- The committee should acknowledge the history of marginalizing communities and craft policies that benefit these communities
- A low-income tolling program is necessary for building an equitable, sustainable system
- Several members requested opportunities for more in-depth conversations

## Welcome and Introductions

JPACT Chair, Councilor Shirley Craddick began the workshop with attendance and emphasized that these discussions will set the policies and funding decisions for the next 20 years.

Council President Lynn Peterson (Metro) provided opening remarks. She thanked everyone for their hard work on developing regional congestion pricing that will help manage demand; provide access to everyone in the region; and meet greenhouse gas (GHG) emission reduction and racial equity goals. She reiterated that the draft congestion pricing policies developed for the 2023 RTP are important for the group to think about for the region's transportation needs and future growth. The RTP is an opportunity to take control of that growth



and identify achievable actions to improve the system. Councilor Peterson asked the group to consider if the regional congestion pricing policies reflect the values and previous work of the legislature (HB3355), ODOT, and JPACT.

Brandy Steffen (Facilitator with JLA) then gave an overview of meeting protocols and agenda. The focus of the workshop is to start discussing the draft policies, building on the previous workshop's recommendations.

## Presentations

### Equity and Mobility Committees

The first presentation was a video recording by Esme Miller, Assistant Director of Research and Assessment at Lewis and Clark College and member of the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force. The Task Force began with the urgency to address climate challenges and evaluated policies from that perspective.

Pricing can provide leverage to develop a more just system, and clearly defined goals will help with implementing the policies. She asked the group to remember that Transportation Demand Management (TDM) is about the whole system, not just motor vehicles. The first action we can take is reduce vehicle miles traveled (VMT) and increase mobility through alternate travel modes. There are also opportunities to find complementary strategies that support equity and climate goals such as affordable housing and workplace incentives and rebates.

"... this region has managed its growth by not just figuratively but literally marginalizing – pushing to the margins – anyone not protected by whiteness, money, or property ownership. The housing, land use, and transportation systems that we have, reliably produce two things: social exclusion and carbon emissions. This is why it is urgent to begin with equity and climate."

- Esme Miller  
POEM Task Force member

She noted the Task Force was excited about variable pricing because it promotes behavior change. She also urged the group to consider equity goals over revenue when considering a pricing structure. It was also important to the Task Force to suggest providing income-based exemptions and use existing means testing systems for a more streamlined approach. They are also enthusiastic about road usage charges if it's administered for equity and climate goals, rather than simply to expand the highway system. She encouraged the group to think broadly about complementary strategies and how important it is to support reliable transport service.

"We get better results when we use a process that is truly built for everyone – not just inclusive. It is built for everyone."

- Kathy Hyzy  
Council President, City of

As a representative for ODOT's Equity and Mobility Advisory Committee (EMAC) member, Dr. Phillip Wu, gave a presentation on EMAC's recommendations on congestion pricing. The goal of EMAC was to center equity on the regional tolling projects and advise the Oregon Transportation Commission (OTC) on how toll programs can benefit communities that have been underserved and underrepresented. They looked at three things: neighborhood health and safety, low income and affordability impacts, and transit and multimodal transportation options.



In order to center equity, Dr. Wu said that we have to acknowledge history. We know previous policy decisions have harmed marginalized communities, and we've seen symptoms of community harm and trauma. EMAC recommends a trauma-informed perspective that results in community empowerment, shared trust, community healing, and growth.

EMAC's July 2022 Recommended Actions include:

- **Congestion management**
  - Balancing improving mobility, advancing climate goals, and avoiding disproportional burdens to marginalized communities
- **Revenue generation strategies**
  - Prioritizing a substantial contribution to low-income programs to provide credits and exemptions to increase affordability
- **Business Investment**
  - Increasing the amount of funds that are spent on businesses owned by disadvantaged, minorities, and women by awarding tolling contracts to these businesses.
- **Accountability**
  - Institutionalizing and normalizing transparency as well as building trust



Finally, EMAC recommends including voices that represent diversity in these conversations in order to achieve these goals.

### Oregon Highway Plan Tolling Policy Amendment

Amanda Pietz (ODOT) gave a presentation on the proposed amendment to Oregon Highway Plan (OHP) tolling policy as required by the Legislature to address current climate, equity, and administrative goals. The drafted policies were released on June 1, 2022 for public review and will close on September 15. The policy will then be revised and considered for adoption by the Oregon Transportation Commission (OTC) in Fall 2022.

The OHP amendment addresses the policy framework on toll pricing and how it will be used as a tool, sets objectives and standards for identifying tolling projects, identifies how to set rates with an equity lens, and recommends how toll revenues should be used.

ODOT has heard three major themes through public feedback:

- Create more flexibility in the definition of corridors in the policy
- Develop a better understanding of how policies on diversion relate to short trips and local transportation systems
- Reconsider how funding from revenue will be spent

"When we looked at how tolling programs are doing this throughout the nation, it was extremely underwhelming. If you're hitting enrollment of maybe 10-15%, you're a national leader. [...] We want 100%. We want everybody who needs to get this to get that benefit."

- Garet Prior  
Oregon Department of Transportation  
(ODOT)

Next, Gareth Prior (ODOT) gave a presentation on the low-income tolling program being considered. He agreed with Council President Peterson, who said the biggest gap is overcoming the trust barrier that the public has with ODOT. Additionally, people want to know how tolling is going to affect their daily budget. ODOT acknowledges that to do tolling equitably, Oregon needs a low-income tolling program.

ODOT is currently considering a few options:

- Provide a significant discount for households equal to or below 200% Federal Poverty level
- Provide a smaller, more focused discount for households above 201-400% of the Federal Poverty level
- Use a certification process that leverages existing programs for verification and further explore self-certification

### **Congestion Pricing**

Margi Bradway (Metro) provided an overview of the draft policies that the group would discuss during the workshop, noting that there will be more opportunities for the members to refine the policies in future meetings. She added that Metro is committed to collaborating with ODOT and bringing updates to the committees early and often as part of the 2023 Regional Transportation Plan (RTP) update.

Alex Oreschak (Metro) presented an overview of Metro's Regional Congestion Pricing Study, recommended by JPACT and the Metro Council in 2018 and completed in 2019. He noted the draft policies for the 2023 RTP were shaped by engaged the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC) in preparation for today's workshop discussion. The study found all four pricing types have the potential to address climate and congestion priorities, and all eight scenarios reduce drive alone rate, VMT, and GHG emissions while increasing daily transit trips. However, there were some tradeoffs for each scenario.

The feedback themes include:

- A desire to lead with equity and climate
- Concerns about diversion and its impacts
- Desire for revenue to be used for multimodal investments

### **Small group discussion: Congestion Pricing Policies**

Brandy then led the group in a small group exercise to offer thoughts on the six draft policy areas identified in the first session. Before the breakout, the following clarifying questions were raised:

- Clarification on the term "equity" and confirmation if we are discussing racial and income equity.
  - Margi noted Metro has a racial-focused equity plan. In the 2018 RTP, JPACT helped define equity focus areas based on race, low-income, and English-as-a-second-language.
- Is there congestion pricing anywhere else in state of Oregon? They also asked Amanda to briefly discuss how congestion pricing would be used for mass transit and multimodal investments?
  - Amanda said no, congestion pricing is not used in Oregon.



- Amanda noted they currently have a hierarchy of spending depending on primary objectives. They are still considering how to portion out funds when congestion pricing is the driving factor. She acknowledged that tolling is subject to Oregon constitutional restrictions, which limits operational funding.
- There are major issues to address and it is frustrating to be limited by the meeting length.
  - Margi noted that Metro adjusted the agenda to make time for more discussion as well as added an additional work session in September. The OHP amendment will also be discussed at the JPACT meeting in August.

The following is a summary of their report back, including their written comments.

**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.**

Below are the written comments:

How do we fund services – adding transit, bicycle, pedestrian improvements

Multimodal needs to be considered at all levels for whole system

Transit will be used for mitigation effort for tolling funds are restricted to how do we find mitigation

Primary mitigation \$ needs to be focused on transit

Pair mitigation and mobility plans with tolling projects and include identified funding sources for raw implementation

Coordinate with LCDC and DEQ to create communities where people spend less than 2 hours/day getting to work, school, chores, and leisure

No practical funding mechanisms exist to increase transit coverage, mobility options do not exist in many areas of the region

Set rates for congestion pricing at a level that will manage congestion and reduce VMT

Develop state policies and laws to connect highway and multimodal spending

Consider high benefits subsidies or discounts for people with low income and people of color

Create options for modes that must use the highways and corridors – freight, transit, etc.

VMT per capita

How do we know what a successful implementation of this policy looks like?

Need to measure mobility at neighborhood scale – not just as level of pricing (state, regional, arterial)

Consider land use

Pay attention to seamless connectivity between multimodal and transit as a reliability facet

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

The following summarizes the group's discussion of the policy:

- The system won't be equitable if there are few mobility options; places with few transit options are not equitable. The mobility policy should promote a multimodal system.
- These are significant issues that need more discussion than through sticky notes. There needs to be more robust discussion and an opportunity to amend the language of each policy.
- Need to define equity with a deeper meaning and richer context.
- These policies could benefit from using a trauma-based decision-making process.

Below are written comments:

Replace integrated with centering	Use language that promotes economic justice
Say more on why equity should be centered	
Make more specific	
Include reference to race	
Disability, equity is also important	How do we develop a fareless transit system?
Consideration of those unbanked	
Policy needs to speak to ODOT and PBOT plans but also other local jurisdictions/projects	
Measure outcomes to ensure impacts aren't disproportionate – BIPOC	
BIPOC individuals and communities and low-income individuals and communities receive a greater-than-proportional share of benefits and pay a less-than-proportional share of costs	These comments are influenced by ODOT's low income report
Be clear on recipient of the benefit	
Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low income or in equity focus areas	Toll exemption should be offered at 400%
Trauma based decision making for policy (EMAC)	
All transit options to be considered	
Ensure no criminalization related to unpaid tolls	
Equity should include travel options such as transit not just car dependent single occupant vehicles (SOV's) with discounts	

**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.**

Below are the written comments:

The phrase “reduce automobile trips” is irrelevant (delete)

Freight-diversion into neighborhoods – bigger harm

Without mobility options diversion will continue to cause accidents and hold our communities hostage

Add concepts of health/safety, travel safety, social safety (be as specific as possible); each safety mode requires specific elements

How does this safety policy apply to corridor or parking policy flavors of congestion pricing?

Traffic and community safety

Are cars (automobiles) unsafe?

Enforcement = safety issues

Replace  
automobile  
with vehicle

Personal  
information  
safety

Divert unsafe  
driving behavior  
to an exit before a  
gantry – safety of  
design of 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.**

Below are the written comments:

Air quality issues – push into other areas

Diversion impacts also to consider impacts on neighborhoods even if not high injury corridors

Price model has to be set to minimize diversion

The policy needs to be clear on how congestion pricing will support multi modal investments

Diversion needs to be tracked and monitored using Bluetooth

Establish minimum standards prior to tolling; without mobility options, diversion will happen

Have a clear/broader definition of corridor

Make sure  
investments will  
reduce emissions

Establish  
VMT per  
capita

True definition of  
diversion should  
include all  
distances including  
short trips

Neighborhood streets – mobility in neighborhoods

Short local trips add tremendous congestion. Prioritize creating reliable, attractive, low-carbon short trip options in neighborhoods and communities

What price gets us to highest revenue without prompting diversion?

Prepare for diversionary impacts – get ahead of arterials that will experience diversion

**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.**

Below are the written comments:

the word “reducing” does not clearly define a target.

Identify pathways/low-carbon options – need options

Measure VMT/per capita

Account for future growth

Action items – focus on corridor-specific work while considering areas with an absence of service

Limit GHG to X tons; limit VMT to y; specific #

Ensure GHG reductions are planned for, measurable and monitored throughout the life of tolling project

Reduce GHG benchmarks

No funding mechanisms exists to expand travel options, until funding exists we will not accomplish our climate goals

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

Below are the written comments:

Coordinate also with public information (which is very tech dependent)

Prioritize low-cost, high impact technology first (aka TSMO)

Not just “emerging” but all technologies; some old tech still works

Create varied and accessible means of payment and enrollment including options for people without access to the internet or banking services



## **Additional Thoughts**

Below are additional feedback and comments collected during the workshop:

- RTP definition for equity
- Need to address/settle long-term funding mechanism for transportation (inevitable decline in gas/diesel/taxes). Ideal opportunity to integrate transit into “transportation”
- Peak commute times drives this – work with employers to distribute hours
- Ensure region is in alignment before ODOT bonds (makes promises)
- For any of the three projects
  - Issues that can’t be consolidated for complicated topics
  - Make decision with people to make the policy built for everyone
  - Coordinate with employers to spread out peak commute hours
  - Stigma or stratification related to discounts
- Funding/toll to fund transit

## **Next Steps & Closing**

Metro Councilor Craddick closed the meeting and thanked everyone for their time and having this joint conversation between Metro and JPACT. The team will summarize the feedback and share it with the representatives for their comments.

The next workshop is scheduled for September and conversations will continue through the fall. Councilor Craddick shared Kim Ellis’ contact information and encouraged those on live stream to provide feedback.


## Appendix A: PowerPoint Slides

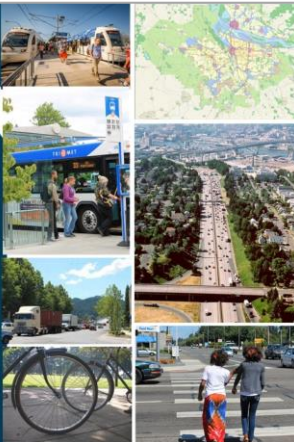
**2023 Regional Transportation Plan**

**Developing Regional Congestion Pricing Policy**

JPACT and Metro Council Workshop 2

July 28, 2022

 Metro



# WELCOME

 **Metro Councilor Shirley Craddick**  
*JPACT Chair*

 **Metro Councilor Lynn Peterson**  
*Metro Council President*

# AGENDA REVIEW


**Facilitator: Brandy Steffen**  
*JLA Public Involvement*

## Context and Background Community Member Reports

**Recorded video from Esme Miller**  
*POEM member*

<https://www.youtube.com/watch?v=xXzAk7AwrSY>


**Dr. Philip Wu**  
*EMAC member*

  
**Urban Mobility STRATEGY**

Oregon Toll Program  
Equity and Mobility Advisory Committee

presented to:  
**Regional Transportation Plan  
Workshop #2 Metro Council and JPACT**

presented by:  
**Dr. Philip Wu, EMAC member**  
Thursday, July 28, 2022

The Urban Mobility Strategy is an initiative of Oregon's Department of Transportation 

### Equity and Mobility Advisory Committee & Oregon Transportation Commission



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









## Context

- Current policy, adopted in 2012, needs to be updated address current climate, equity, and administrative goals
- The policy will:
  - Define key terms and types of road pricing
  - Clarify the need and goals
  - Provide guidance on rate setting and uses of revenue






## Overview

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





## Schedule

## Next steps

- Public comment period extended to September 15 – please review the draft and email us your comments at [OHPManager@odot.oregon.gov](mailto: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



# Low Income Toll Report



[www.OregonTolling.org](http://www.OregonTolling.org)



## Equity and Mobility Advisory Committee & Oregon Transportation Commission




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



[www.OregonTolling.org](http://www.OregonTolling.org)



## 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. FPL Poverty Guidelines for 2022. <https://www.fpl.hhs.gov/poverty/2022/>

## 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

## 2023 Regional Transportation Plan Developing Regional Congestion Pricing Policy

**Margi Bradway**

*Deputy Director, Planning, Development & Research, Metro*

**Alex Oreschak**

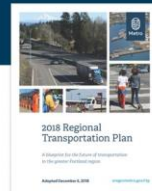
*Senior Transportation Planner, Metro*



## Planning Context

Multiple plans identify the need since 2000 RTP

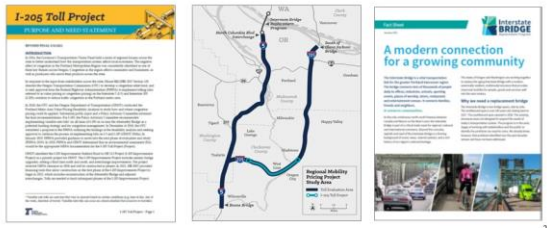
- TSMO Strategy— 2010 and 2021, 2014 Climate Smart Strategy & Federal congestion management process for the Region since the mid-1990s



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

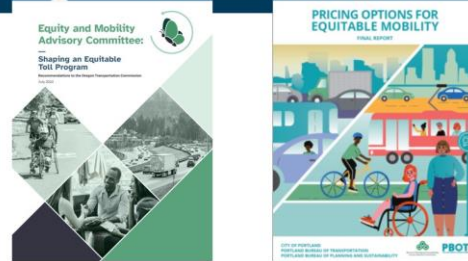
- Over \$15 billion in transportation investments need to be paired with travel demand efforts
- Multiple congestion pricing policies in the 2018 RTP

## Project Context



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## Community Input



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## 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



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## 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.



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## 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 Hatt**  
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



**Clarissa Cabansagan**  
Director of Programs; National leader in transportation policy and mobility justice  
TransForm

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## 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

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## 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
7.28.22	JPACT/Council Workshop	Introduce Draft 2023 RTP Policy, Action Items

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## 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.

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## 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

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## Next Steps – RTP Update

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	

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## Draft RTP Congestion Pricing Policies

<p><b>Policy 1</b> <b>Mobility:</b> 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.</p>	<p><b>Policy 4</b> <b>Diversion:</b> Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.</p>
<p><b>Policy 2</b> <b>Equity:</b> Integrate equity and affordability into pricing programs and projects from the outset.</p>	<p><b>Policy 5</b> <b>Climate:</b> Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.</p>
<p><b>Policy 3</b> <b>Safety:</b> 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.</p>	<p><b>Policy 6</b> <b>Emerging Technologies:</b> Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.</p>

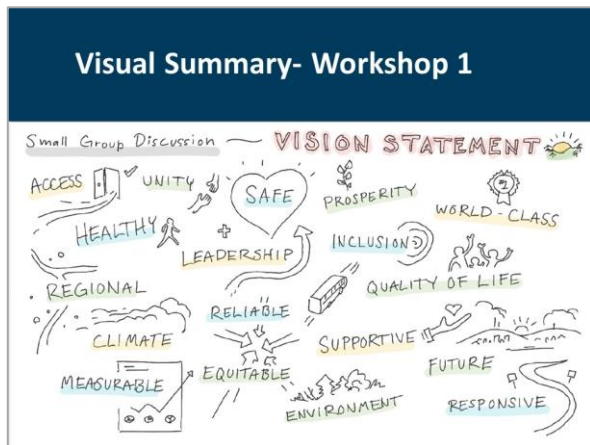
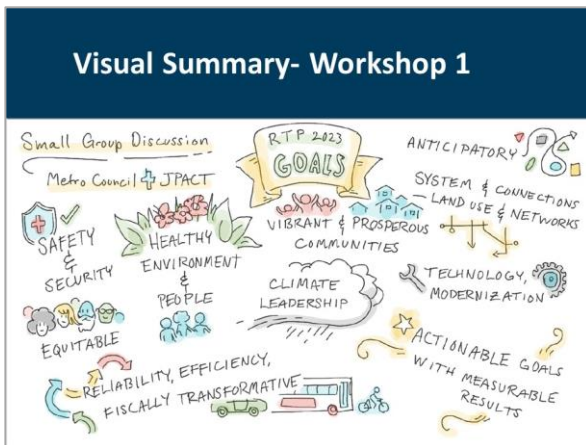
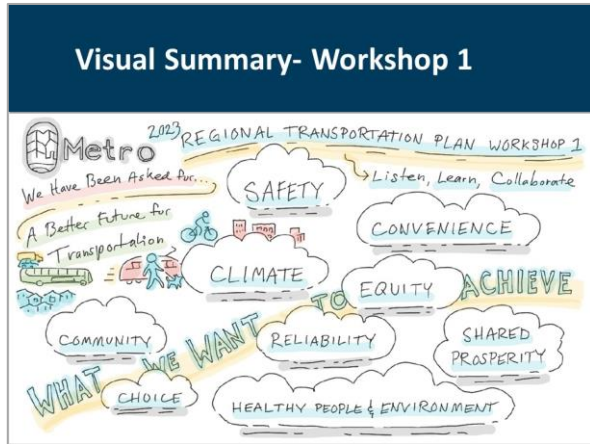
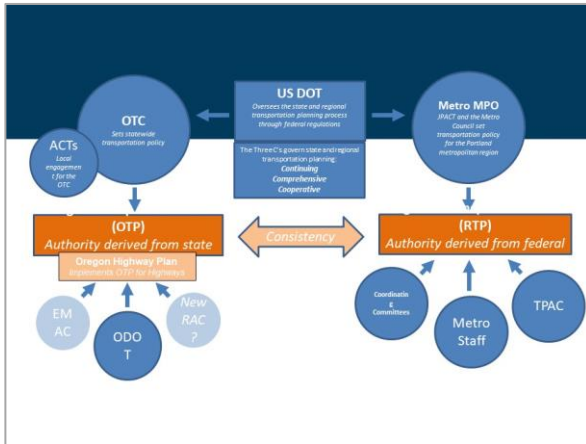
35

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





**Small Group Activity**

**Table discussions – 4 rounds**

What do you like?

Will these policies help us achieve our goals for the future of transportation?

How would you update these policies?

## Report back and group discussion

## THANK YOU & NEXT STEPS

### RTP workshop series for JPACT and the Metro Council

- 1 **Updating Our Vision and Goals  
For the Future of Transportation**  
6/30/22
- 2 **Developing Regional  
Congestion Pricing Policy**  
7/28/22
- 3 **Creating Safe and Healthy  
Urban Arterials**  
9/29/22
- 4 **Strengthening the Backbone  
of Regional Transit**  
10/27/22
- 5 **Working Together to Tackle  
Climate Change**  
11/10/22

#### MARK YOUR CALENDARS!

The workshops for JPACT  
and the Metro Council will  
be held from 7:30-9:30 AM.

45

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

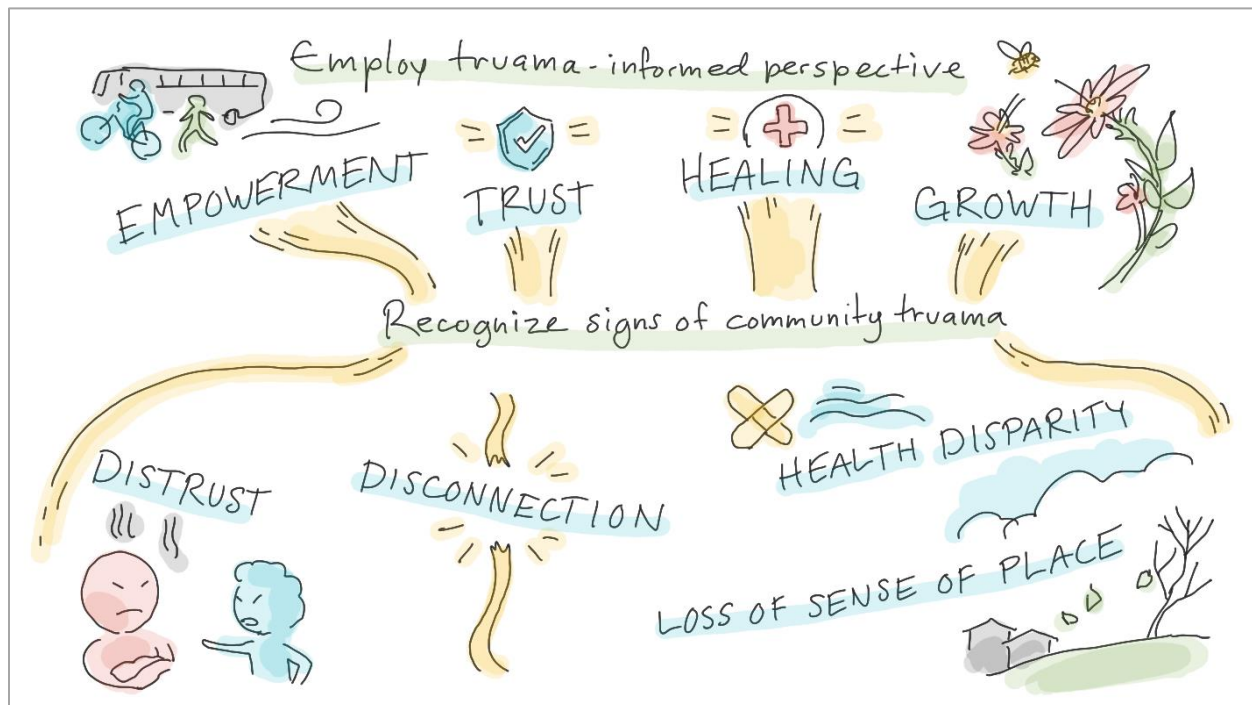
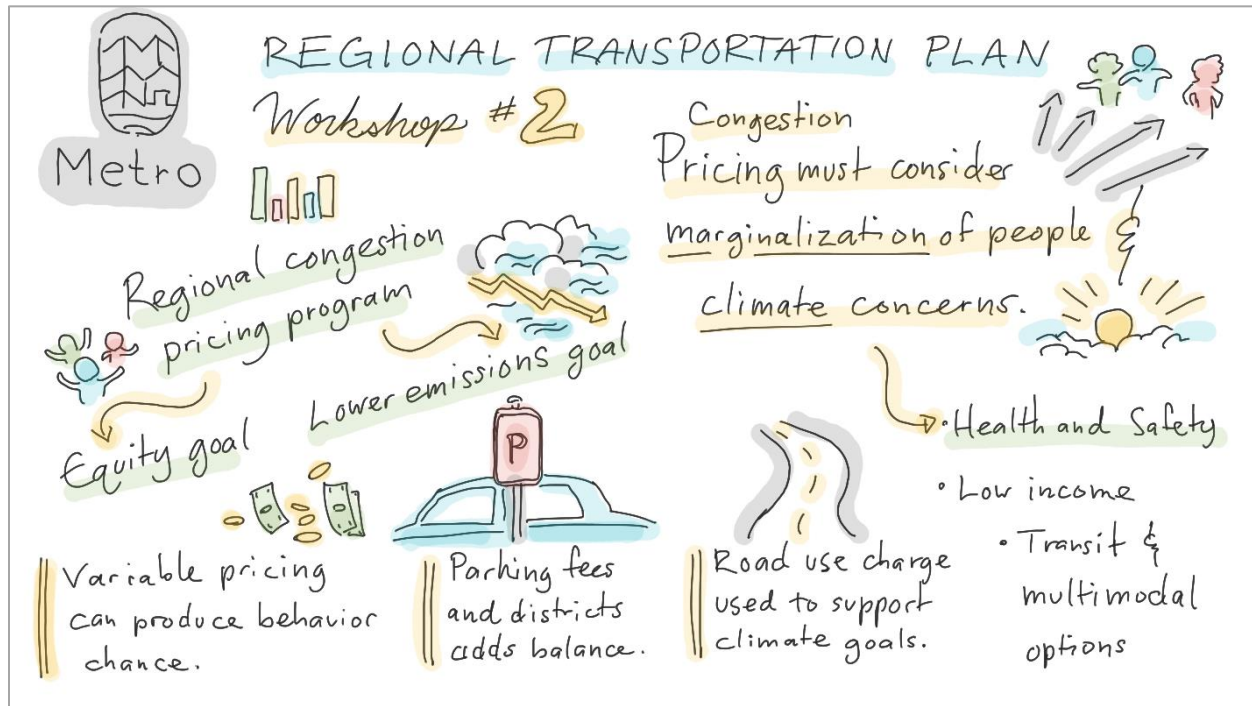


**Metro**

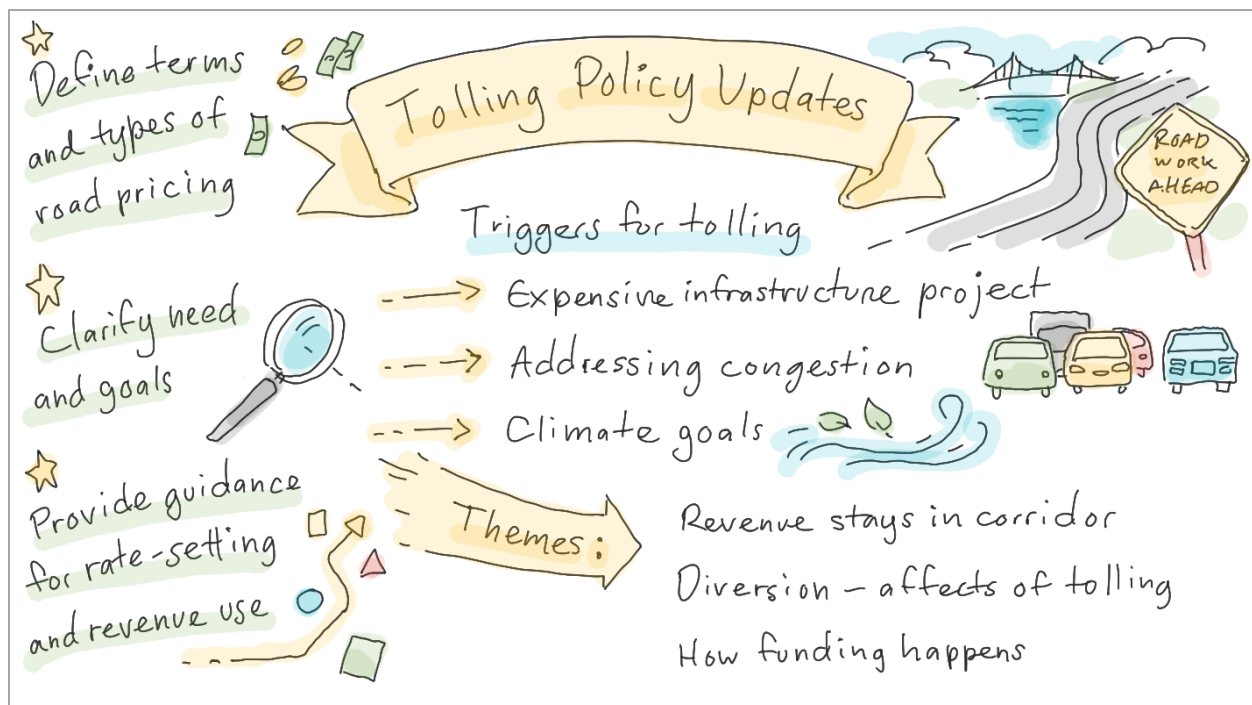
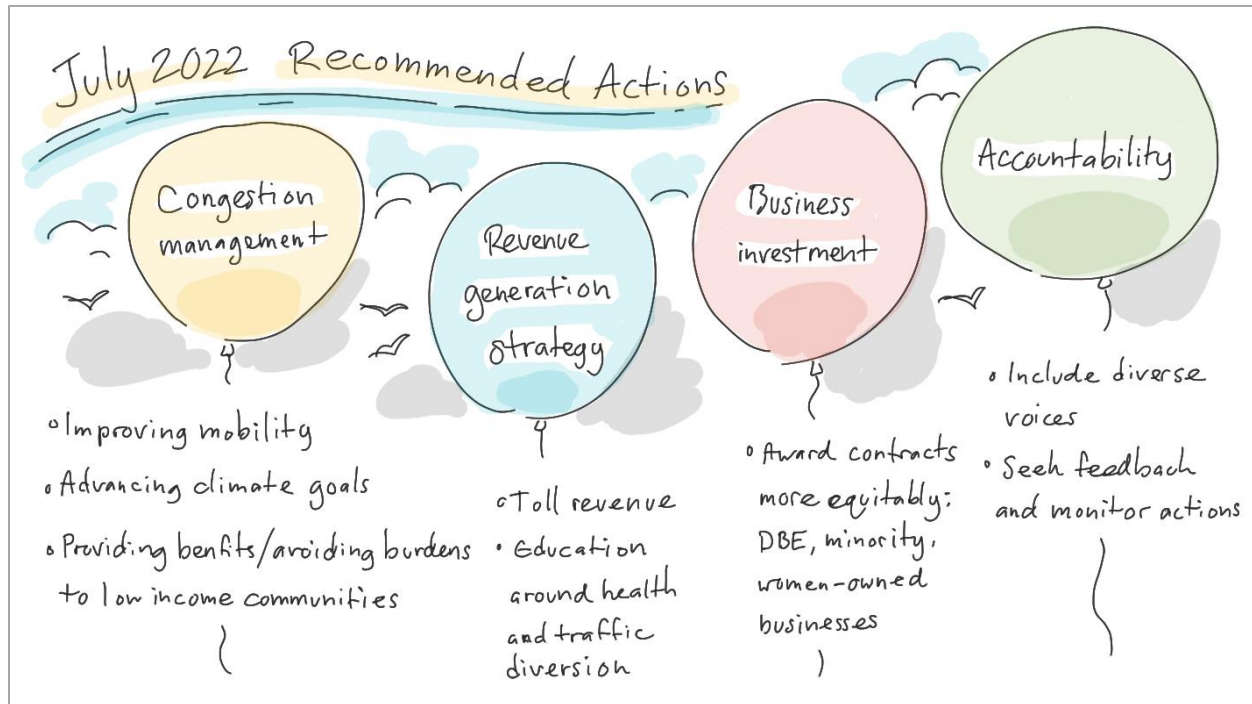
Kim Ellis, AICP  
RTP Project Manager  
[kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov)

[oregonmetro.gov/rtp](https://oregonmetro.gov/rtp)

## Appendix B: Visual Illustrations







Trust barriers: low-income toll pricing

Options for consideration

Provide discount for households at or below 200% federal poverty

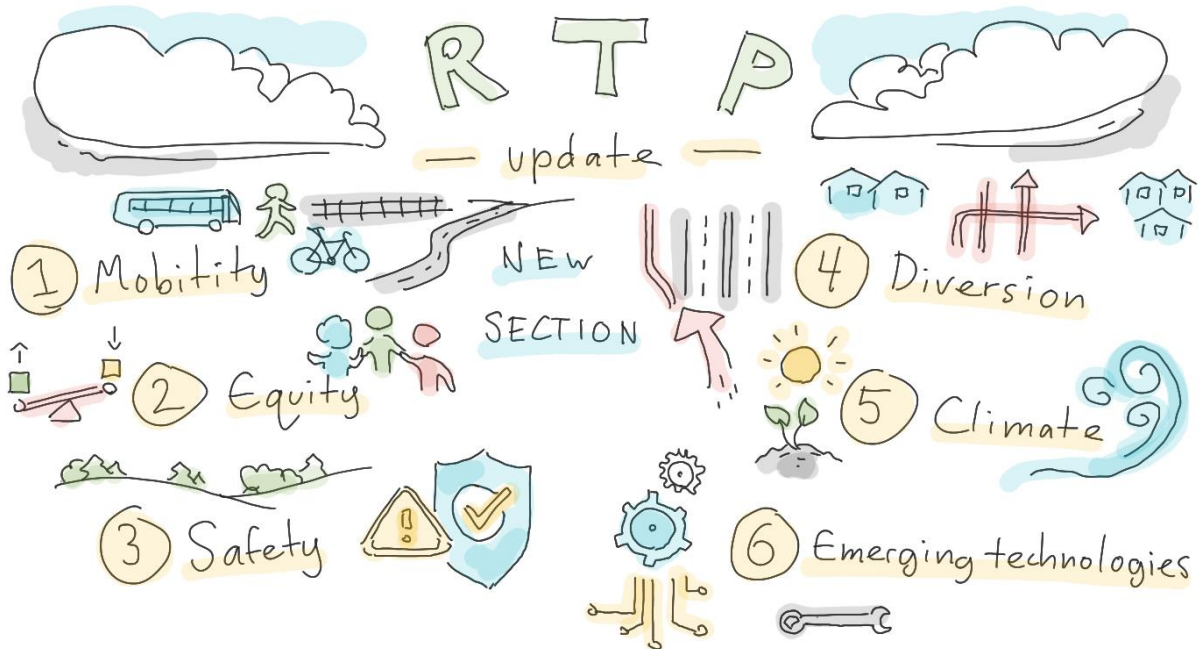
Provide smaller, focused discount for 201% - 400% —↑

Use certification leveraging existing programs

We heard loud  
and clear:

METRO & ODOT

should work  
together



## Appendix C: Other Resources

Meeting:	JPACT & Metro Council RTP Workshop 2
Date:	Thursday, July 28, 2022
Time:	7:30 a.m. to 9:30 a.m.
Place:	Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221
Livestream:	<a href="https://youtu.be/-mF1lCXAWP8">https://youtu.be/-mF1lCXAWP8</a> ; Telephone 877-853-5257 (Webinar ID: 831 1110 7022)
Purpose:	Discuss Congestion Pricing Policy being developed for 2023 Regional Transportation Plan.
Outcome(s):	Feedback on draft congestion pricing policies for 2023 RTP.

---

- 7 a.m. Venue opens**
- Optional breakfast & mingling.
- 7:30 a.m. Welcome & Introductions**
- Councilor Craddick, JPACT Chair
  - Metro Council President Lynn Peterson
- 7:45 a.m. Context and Background**
- ODOT & City of Portland Equity & Mobility Committees
    - Esme Miller, POEM member (video)
    - Dr. Phillip Wu, EMAC member
  - Oregon Highway Plan Tolling Policy Amendment presentation
    - Gareth Prior, Toll Policy Manager, ODOT
  - Congestion Pricing Presentation
    - Margi Bradway, Deputy Director of Planning, Development & Research, Metro
    - Alex Oreschak, Senior Transportation Planner, Metro
- 8:15 a.m. Small group discussion: Congestion Pricing Policies**
- 6/30 Workshop review
  - Small group breakout
  - Report back
- 9:15 a.m. Next steps**
- 9:25 a.m. Thank you/adjourn**
- Councilor Craddick, JPACT Chair

## 2023 REGIONAL TRANSPORTATION PLAN

**JPACT and Metro Council Workshop Series**

A series of monthly in-person workshops will take place for JPACT members or alternates and the Metro Council to discuss critical elements of the 2023 Regional Transportation Plan.

Due to COVID-19, non-essential staff and members of the public are invited to observe via an online livestream on YouTube. Phone call-in options are not available. Find the workshop livestream information at [oregonmetro.gov/calendar](https://oregonmetro.gov/calendar)

Find out more about the plan update at [oregonmetro.gov/rtp](https://oregonmetro.gov/rtp).



1

**Updating Our Vision and Goals for the Future of Transportation**

Discuss our vision and goals for the future of transportation

*Outcome: Provide feedback on updating the vision and goals for the transportation system serving greater Portland*

June 30,  
2022

2

**Developing Regional Congestion Pricing Policy**

Discuss proposed regional congestion pricing policies that build on findings and recommendations from Metro's Regional Congestion Pricing Study

*Outcome: Provide feedback on draft policies for congestion pricing in the region*

July 28,  
2022  
7:30-9:30  
a.m.

3

**Creating Safe and Healthy Arterials**

Explore regional challenges and opportunities for making our major streets safe and healthy for everyone

*Outcome: Provide feedback on addressing the challenges of major streets in the RTP update*

Sept. 29,  
2022  
7:30-9:30  
a.m.

4

**Strengthening the Backbone of Regional Transit**

Explore options for advancing our high capacity (fast, reliable) transit vision

*Outcome: Provide feedback on corridors to be considered for high capacity transit investment, including which are most important today and in the future*

Oct. 27,  
2022  
7:30-9:30  
a.m.

5

**Working Together to Tackle Climate Change**

Discuss progress implementing the region's adopted Climate Smart Strategy

*Outcome: Provide feedback on policies and investments needed to significantly reduce carbon emissions from our transportation system*

Nov. 10,  
2022  
7:30-9:30  
a.m.



## Attachment 1

# Metro Regional Transportation Plan – Revised Draft Congestion Pricing Policy Language

July 2022







### 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

- |                 |   |
|-----------------|---|
| <b>Policy 1</b> | <b><u>Mobility</u></b> : 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. |
| <b>Policy 2</b> | <b><u>Equity</u></b> : Integrate equity and affordability into pricing programs and projects from the outset.   |
| <b>Policy 3</b> | <b><u>Safety</u></b> : 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.  |
| <b>Policy 4</b> | <b><u>Diversion</u></b> : Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.  |
| <b>Policy 5</b> | <b><u>Climate</u></b> : Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.  |
| <b>Policy 6</b> | <b><u>Emerging Technologies</u></b> : Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.  |

**Congestion Pricing 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.**

Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.



- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

**Congestion Pricing 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.**

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

**Congestion Pricing 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.**

Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.

- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

**Congestion Pricing 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.**

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.

- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

### 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/](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



2023

# REGIONAL TRANSPORTATION PLAN WORKSHOP 1



We Have Been Asked for...

A Better Future for  
Transportation



SAFETY

Listen, Learn, Collaborate

CONVENIENCE

CLIMATE

EQUITY

ACHIEVE

COMMUNITY

RELIABILITY

SHARED  
PROSPERITY

HEALTHY PEOPLE & ENVIRONMENT

CHOICE

WE WANT

WHAT



# Small Group Discussion


Metro Council + JPACT


 SAFETY & SECURITY

 EQUITABLE

 HEALTHY ENVIRONMENT & PEOPLE



 VIBRANT & PROSPEROUS COMMUNITIES

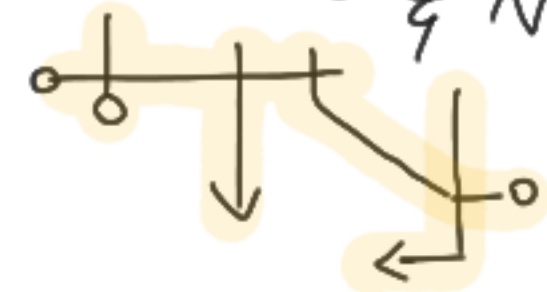
 CLIMATE LEADERSHIP

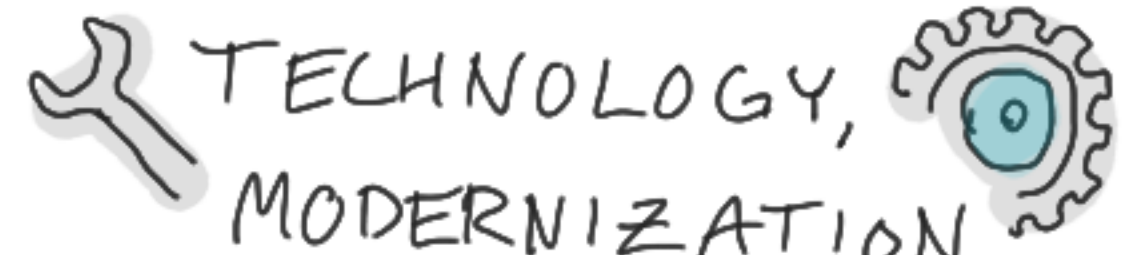
 RELIABILITY, EFFICIENCY, FISCALLY TRANSFORMATIVE




ANTICIPATORY 

SYSTEM & CONNECTIONS  
— LAND USE & NETWORKS



 TECHNOLOGY, MODERNIZATION

 ACTIONABLE GOALS WITH MEASURABLE RESULTS

# VISION STATEMENT





# Equity and Mobility Advisory Committee (EMAC) Recommendations for July 2022 Oregon Transportation Commission Action

The Equity and Mobility Advisory Committee (EMAC) advises the Oregon Department of Transportation (ODOT) and the Oregon Transportation Commission (OTC) on creating a process for delivering equitable outcomes on the I-205 Toll Project and Regional Mobility Pricing Project. As is described in the Equity Framework, our work informs guidelines, strategies, processes, and policies to advance equity with implementable measures before and after tolling begins.

The following questions guide collaboration with ODOT and the OTC on structure and execution of an equitable public process before and after tolling begins. These are also intended to help determine whether equity is advanced through the Toll Program by ODOT and the OTC:<sup>1</sup>

- **Rate** – What is the toll rate and the relative cost burden across aggregated demographic populations?
- **Revenue** – How and where is toll revenue invested?
- **Responsibility** – Who is responsible for long-term oversight and adjustments of the toll program? How will those responsible demonstrate transparency and accountability?

## Request of the Oregon Transportation Commission in July 2022

We respectfully request that the Oregon Transportation Commission (OTC) join us in partnership this July by supporting our recommended actions. **By supporting these actions, the OTC would provide strategic direction to ODOT to center equity using these actions as the basis for future decisions.**

We know that ODOT has more work to do to take the strategic direction provided in these actions and work to operationalize and implement. We look forward to working with the OTC and ODOT in that process.

These actions build from and connect to the Foundational Statements, which EMAC and OTC supported in November 2021. The following pages include the Foundational Statements and each recommended action notes which statement(s) they address.

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<sup>1</sup> For further context for the recommendations that follow in this document, when EMAC refers to equitable benefits, we mean not just for the residents of Oregon, but also of southwest Washington.

## **Foundational Statements**

The Foundational Statements will serve as building blocks for the Equity and Mobility Advisory Committee's (EMAC) recommendations to inform commitments from ODOT and the Oregon Transportation Commission (OTC) to advance equity through the Oregon Toll Program. To provide high-level consensus, the following Foundational Statements were developed by EMAC, in partnership with ODOT staff and unanimously supported by the OTC at their November 18, 2021 meeting:

1. Provide enough investment to ensure that reliable, emissions-reducing, and a competitive range of transportation options (bike, walk, bus, carpool, vanpool, etc.) are provided to advance climate, safety, and mobility goals, and prioritize benefits to Equity Framework communities.
2. Climate and equity needs are connected and solutions must be developed to address both at the same time. Further work needs to be done to support both congestion management and vehicle miles traveled (VMT) reduction with an emphasis on increasing functional alternatives to driving, while not increasing diversion nor heavily impacting low-income car-dependent people.
3. There must be toll-free travel options available to avoid further burdening people experiencing low-incomes who are struggling to meet basic needs (food, shelter, clothing, healthcare).
4. To the greatest degree possible, investments that are necessary to advance equity must be delivered at the same time as highway investments and be in place on day 1 of tolling or before. Additional work needs to be completed to identify these investments.
5. Tolling must be a user-friendly system that is clear and easy to use by people of all backgrounds and abilities, including linguistic diversity, and those without internet access.
6. Equitable benefits that are offered in Oregon must extend into Southwest Washington.
7. Although the toll projects will have a statewide impact, they must be developed in coordination with regional partners to build an equitable and successful transportation system, together.

## **Congestion management approach**

**We understand the dual goals of the Oregon Toll Program: manage congestion and raise revenue for investments.** We also know there are many paths to achieving and defining these goals, and we want to see greater clarity.

**We believe that we cannot build our way out of congestion.** To effectively address congestion, ODOT must prioritize managing system demand, with an emphasis on encouraging travel outside of peak-commute hours, reducing the number of vehicle trips taken, and increasing the use of higher-capacity and climate-friendly modes that can effectively move many more people with fewer cars. We recognize and support the definition of demand management as re-designing and operating the system to reduce congestion on the highways through tiered pricing and investment in transportation options, including the promotion of carpooling, vanpooling, and mass transit.

**We recognize the relationship between congestion pricing, equity and meeting climate action goals.** We have worked to identify a wide range of multi-faceted strategies to equitably maximize the benefits of congestion pricing. We see this as a real opportunity to move the needle on core state and regional goals – and doing so in such a way that minimizes harm and provides disproportionate benefits to Equity Framework communities.

**We acknowledge the delicate balance in setting toll rates.** Raising the price too much for reinvestment and climate goals could burden populations already struggling with the region's high cost of living and increase diversion impacts to communities surrounding the highway. Keeping the price too low could leave us with no benefits from congestion pricing while traffic congestion burdens continue.

### **Recommended Action #1 (connects to Foundational Statements 1, 2, 3, and 7)**

The following goals should guide ODOT's decisions on tolling related to congestion management, including design, setting rates, monitoring, and adjusting tolls, with an emphasis on avoiding disproportionate burdens and focusing on benefits among Equity Framework communities:

- Price the system to maximize efficiency of the toll corridors, emphasizing moving as many people as possible in the existing lanes, coupled with robust investments by ODOT and regional partners in reliable, emissions-reducing, and a competitive range of transportation options (bike, walk, bus, carpool, vanpool, etc.) to advance climate, safety, and mobility.
- Limit freight and longer-trips diverting into local communities.
- Improve access to jobs, healthcare services, education, recreation and natural spaces.
- Improve air quality and reduce Greenhouse Gas (GHG) emissions.
- Reduce vehicle miles traveled (VMT) per capita.
- Increase mode shift from single-occupancy vehicles to higher-occupancy vehicles or transit.
- Price the system so that lower-income households pay a lower percentage of household income than middle and upper-income households pay.

## **Revenue generation approach**

**We understand that tolling alone cannot and should not bear the sole weight for raising enough revenue for investments to address past wrongs and existing disparities.** We see the overarching goal to deliver major projects identified by the Oregon Legislature (raise revenue for infrastructure) and finance reliable, convenient, emissions-reducing, competitive, and health-promoting transportation options (bike, walk, bus, carpool, vanpool, etc.) with an emphasis on addressing the needs of historically excluded and underserved communities.

**How toll revenues are invested is an essential question to determine if or how the Program advances equity.** Without agreements or direction at this time, which could inform the official toll rate-setting process, we are concerned that there will not be adequate money left to address the needs and concerns of Equity Framework Communities.

**We agree that congestion pricing through variable rate tolls, is needed on I-5 and I-205, and we understand that the OTC and ODOT must deliver major projects identified by the Oregon Legislature.** We understand that investment-grade traffic and revenue analysis is not conducted until around six months before the final toll rates are set. Without the fine-tuned traffic and revenue analysis data available, we believe that the OTC must adopt a priority framework to guide ODOT and the future toll rate setting process.

**We have routinely heard that people are worried about the increased cost of travel on their budget and community, especially on those experiencing financial hardship (low-income).** We support the lowest toll rate possible for people experiencing low income, and programs to reduce impacts and unintended consequences on people experiencing low-incomes. In creating an equitable system, we also consider the impacts on working class and middle-income families who do not have resilient finances.

We recognize that this may result in less toll revenue to fund various projects and programs, including needed programs or services to advance equity.

### **Recommended Action #2 (connects to Foundation Statement 1, 2, 3, and 7)**

For the approach to revenue generation, the Oregon Transportation Commission should pursue the following strategy:

- Prioritize providing a substantial contribution to the low-income program (e.g., discounts, credits, or exemptions) to address affordability impacts for those with the least ability to pay.
- Select a rate schedule that emphasizes demand management and equity advancement.
- Maintain the lowest possible toll rates for everyone while generating sufficient revenue for Oregon Legislature-identified multi-modal capital investments and project mitigations (including for the low-income program).

## **Involving Disadvantaged Business Enterprises, Minority Business Enterprises, and Women Business Enterprises and community-based organizations**

**We anticipate that businesses whose workers and goods frequent I-5 and I-205 will be among the groups most affected by tolling.** We need to balance the cost of tolls with the benefits of investments and managed congestion. At the same time, we must identify impacted Disadvantaged Business Enterprises (DBE), Minority Business Enterprises (MBE), and Women-Business Enterprises (WBE) and proactively reduce their burden. We know that securing and maintaining a job is critical to combating poverty.

As the toll program aims to improve mobility, environmental, and other outcomes, it must not lose sight of the implications for business districts and corridors where changes may occur – especially for DBE, MBE, and WBE that may not have the resources to adapt to major changes. Deep engagement and assessment of corridors and districts where significant changes are expected to occur, whether it be the direct or indirect impacts of vehicle trips, transit ridership, or other forms of travel, is essential. Preparing businesses for expected changes and helping buffer any negative impacts will help create a triple win for mobility, environment, and the economy.

Tolling and investment must create more jobs for women, small, and minority-owned businesses and in historically excluded communities.

### **Recommended Action #3 (connects to Foundational Statements 1, 4, and 7)**

Identify and commit to a plan for increasing the percentage of dollars spent on Disadvantaged Business Enterprises, Minority Business Enterprises, and Women Business Enterprises that are awarded contracts for designing, building, and operating the toll system and projects supported by toll revenues.

### **Recommended Action #4 (connects to Foundational Statements 1, 4, 5, and 7)**

Provide ongoing funding for community-based organizations (CBOs) that serve communities identified in the Oregon Toll Program's Equity Framework and that are impacted by tolling to support the following transportation-related activities including, but not limited to:

- CBO transportation services for carpool, vanpool, and other transportation programs building upon the concept of ODOT's newly created Innovative Mobility Program.
- Compensation for community members to participate in tolling-related transportation planning activities, projects, or committees.
- Toll education programs and ongoing engagement to inform the toll program.
- Increase enrollment in the Oregon Toll Program account holders and access to the low-income toll program.
- Include CBOs in the monitoring process to identify and help prioritize actions to address neighborhood health and safety issues caused by increased diversion of freight or longer-trips from tolling.

## **Accountability**

**We know that there are many other decisions the OTC will make before establishing the oversight and adjustment process for tolling.** We recognize that achieving equity is a process over time; however, establishing an oversight and adjustment process is a high priority for EMAC at this time. We must have clarity and confidence that after our work in planning for tolling is done that ODOT will continue with the kind of community-grounded equitable planning approach that has made this process successful in our eyes to date.

**We strive to ground our equity advancement work on the realities that Equity Framework Communities are facing, and on solid evidence, research, and analysis.** We are doing our best to learn and provide recommendations based on community input, data, and best practices in the planning stage. We are also aware of the limitations of data, models, and other planning tools and that the actual benefits and impacts of tolling will need to be monitored once tolls are in place to really understand the effects of tolling on historically impacted and underserved communities and adjust accordingly.

These are our recommendations to advance equity based on what we know today. Actual impacts and benefits will need to be monitored once tolls are in place and implementation measures may need to be adjusted in the future.

**As opposed to other transportation projects and plans where community engagement typically ends after the plan or project is finalized, tolling, as a programmatic strategy to manage congestion, offers an important opportunity to include community voice as roadway conditions, technology, toll revenues, and community needs and priorities shift over time.**

A commitment to ongoing engagement and consultation with historically excluded and underserved community leaders and organizations in monitoring, reporting, and programmatic changes after tolling begins is an essential step to building community understanding, capacity, trust, accountability, buy-in, and support. It can also help planners and policymakers ground-truth data, and generally make more informed decisions.

We know that new committees are coming online soon. There will be a Rules Advisory Committee that ODOT will support to provide a recommendation directly to the OTC on toll rate setting and rules that govern important items like enforcement and operations of tolling. We want to ensure that equity will be prioritized in their important work.



**Recommended Action #5 (connects to Foundational Statements 4, 6, and 7)**

To center equity in the important rulemaking and I-205 Toll Project rate setting process, the following elements should be included:

- Include an EMAC member on the Rules Advisory Committee.
- The Rules Advisory Committee should include delegates on behalf of Equity Framework communities, people with lived or professional experience with equity. As delegates, committee members should be empowered to effectively and meaningfully participate in committee decision making.<sup>2</sup>
- EMAC should be provided with the investment-grade traffic and revenue analysis information and be given the opportunity to give feedback directly to the Rules Advisory Committee before they make a recommendation to the Oregon Transportation Commission.

**Recommended Action #6 (connects to Foundational Statement 1, 2, 3, 5, 6 and 7)**

Once tolls are in place and EMAC's work is complete, ODOT and the OTC should continue to support a toll equity accountability committee (that is separate and complementary to the Rules Advisory Committee) or establish another structure where equity voices are at the table in a consistent, transparent, and resource-supported way to ensure long-term accountability. Either the committee or another structure will review progress of the toll program over time to provide feedback and guidance to ODOT and the OTC to help advance equity processes and outcomes with tolling on I-5 and I-205.

The committee (or other entity) would monitor, evaluate, and provide feedback on the following:

- Equity commitments made to address EMAC's core intent: addressing issues of affordability, and the impact of diversion on neighborhood health and safety, and transit and multimodal transportation options.
- Equity commitments made as a part of mitigation in the I-205 and RMPP toll projects.
- Enrollment in and economic impacts of the low-income toll program over time.
- Disadvantaged Business Enterprise (DBE) commitments for workforce development and contracting of toll operations and projects funded by tolling.
- Improving ODOT's approach to equitable engagement and customer service practices.

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<sup>2</sup> For further context about creating an inclusive and equitable decision making process, reference the Journal of American Planning Association's "[Building That Well-Known Ladder For Citizen Participation](#)."

# PORTLAND'S PRICING OPTIONS FOR EQUITABLE MOBILITY



## Why consider a new approach to pricing?

Between 2020-2021, the Portland Bureau of Transportation (PBOT) in partnership with the Bureau of Planning and Sustainability (BPS) convened a community task force to explore a complex question:

**Could we use new pricing strategies in Portland to improve mobility, address the climate crisis and move toward a more equitable transportation system?**

Our transportation system today doesn't work for everyone. And with 600,000 new residents expected to live in the Portland region by 2040, many of the problems we're experiencing now—like worsening traffic, rising carbon emissions, poor air quality and high crash rates—are due to get worse. These challenges disproportionately impact Black, Indigenous and other People of Color (BIPOC), Portlanders with low incomes, and people with disabilities.

Regional interest in pricing—sometimes called “congestion pricing,” “value pricing” or “mobility pricing”—has increased in recent years as we grapple with how to combat these challenges and better manage our roads. Through the Pricing Options for Equitable Mobility (POEM) project, the City sought to understand if and how pricing could work here in Portland to advance our goals.

Pricing refers to strategies that involve charging people for driving or using roadway space. These charges can vary based on different factors, for instance, how congested the roads are, the time of day, income levels or what type of vehicle is using the road. By applying a charge, pricing can help people consider the impact of their travel choices and encourage different options (like carpooling, traveling at off-peak hours or using other, non-driving options when possible), which help to create a more efficient, more equitable and more sustainable system for all.

## PRICING STRATEGIES EXPLORED THROUGH THE POEM PROJECT:

	Prices on parking
	Prices on vehicle-based commercial services (e.g., private for-hire trips and urban delivery)
	Highway tolling
	Cordons or area pricing
	Road usage or per-mile charges

## THE POEM COMMUNITY TASK FORCE

Between January 2020 and July 2021, the POEM Task Force—comprised of 19 community members representing diverse perspectives, interests and expertise from across Portland—met monthly to advise the City on if and how new pricing strategies could advance equitable mobility.

### Over the course of these 18 months, the Task Force:

- **Learned about the history of transportation and mobility in our region** and why centering racial equity matters.
- **Developed a shared, working definition** of equitable mobility (see back).
- **Learned about how pricing strategies have been used in other places** and why they are being considered in Portland and the Metro region.
- **Explored five different typologies of pricing**, identifying opportunities, risks and questions for further analysis.
- **Reviewed preliminary modeling of different pricing strategies** and impacts on the transportation system.
- **Deliberated and adopted recommendations** for City leadership.

## TASK FORCE RECOMMENDATIONS TO CITY LEADERSHIP

On July 12, 2021, the Task Force voted to adopt their recommendations to City leadership. A majority of members had to approve of a recommendation for it to advance, and all recommendations received support from at least 16 members of the 19-member Task Force. The following is a summary of the group's recommendations—a complete copy is available on the POEM website.

**[www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem#toc-poem-community-task-force](http://www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem#toc-poem-community-task-force)**

### Principles for pricing for equitable mobility

*Overarching themes that should apply to all future pricing policy analysis and development:*

- Pricing holds promise as a strategy to help move people and goods in a more efficient, climate-friendly and equitable way, but **ONLY** if it is designed, implemented and adjusted with intention.
- The City should urgently advance pricing options for equitable mobility policies. Failure to act is not an option.
- The City should utilize the Equitable Mobility Framework (see back) to guide future pricing and transportation policy deliberations.
- Pricing is just one policy tool and not a standalone solution.
- The City should design future pricing strategies according to the following guidelines:
  - Prioritize the goal of reducing traffic demand.
  - Provide exemptions for households living on low incomes.
  - Center climate and equity outcomes.
  - Reinvest revenue generated from pricing in strategies that further expand equitable mobility.
  - Reduce unequal burdens of technology and enforcement.

## Nearer-term pricing recommendations

*Specific strategies the Task Force thinks the City should pursue in the next 1-3 years:*

- Create a flexible commuter benefits program requiring employers who provide free/subsidized parking to offer that value in cash or alternative transportation benefits.
- Create new priced on-street parking permit and meter districts and reduce the time and complexity involved in approving new districts.
- Develop and implement a fee on privately-owned, off-street parking lots.
- Accelerate implementation of the 2018 Performance-Based Parking Management policy.
- Develop and implement a fee on urban delivery, including on-demand parcel and food delivery services, to reduce negative mobility, climate and safety impacts.
- Modify the existing fee structure on private for-hire transportation to reduce negative mobility, climate and safety impacts.
- Advocate for amending the Oregon state constitutional restriction that limits use of funds generated through taxes on motor vehicles.
- Advocate for equitable mobility principles and design in the state toll program.

## Longer-term pricing recommendations

*Strategies the City should continue exploring, but may take longer to implement:*



Truly dynamic demand-based parking pricing



A locally controlled road usage charge



A Central City cordon

## Complementary strategies

*Policy areas that are most vital to invest in in parallel with pricing:*

- **Public transit** infrastructure, operations and service.
- **Bike and pedestrian** infrastructure and programs.
- **Traffic safety** improvements.
- **Incentives and financial support** for different travel options.
- **Strategies to encourage shifting** to electric/more fuel-efficient cars, freight and buses.
- **Affordable housing** connected to multi-modal transportation options.
- **Land use policy** that leads to more connected, complete and inclusive neighborhoods.

## Implementation next steps

*Policy areas that are most vital to invest in parallel with pricing:*

- **Take a leadership role** in advancing transformative pricing policies.
- **Invest in regular data collection** and surveying to inform equity analyses.
- **Study near and longer-term mobility impacts** of the COVID-19 pandemic.
- **Conduct wider community engagement** to inform further pricing policy development.
- **Partner with community members, businesses and organizations** to build coalitions to champion transformative solutions.
- **Explore models for a unified financial assistance system** for households living on low incomes.



Over its first few meetings, the Task Force developed a working draft Equitable Mobility Framework to guide conversation and analysis, explore tradeoffs, and inform decision making. The Equitable Mobility Framework was inspired by and adapted from the Greenlining Institute's Mobility Equity Framework: [www.greenlining.org/publications/2018/mobility-equity-framework](http://www.greenlining.org/publications/2018/mobility-equity-framework).

The Equitable Mobility Framework includes five categories that represent what community members care about in the mobility system, as well as 17 indicators to help to evaluate the impacts and opportunities of different policy ideas.

### WHO ARE WE PRIORITIZING?

This framework prioritizes extending benefits, reducing disparities and improving safety for Black people, Indigenous people and People of Color (BIPOC communities). Leading with race, the Framework will also be used to consider impacts on people with disabilities, Portlanders with low incomes, multi-lingual individuals and displaced communities.

#### Why center race?

Because racism is a contributing factor to disparities in equitable mobility: unequal access to mobility options, sustainability and health outcomes, experiences of safety in public space and economic opportunity. Addressing racism itself must be part of the work of creating a more equitable transportation system.

### WHAT'S NEXT?

After two years of analysis and Task Force conversation, the POEM project suggests that pricing is a promising and currently under-utilized tool that could help make our transportation system more efficient, address the inequities we see today and help reduce carbon emissions.

The POEM project was the start of a conversation. Before implementation of these recommendations, 07/28/22

## WORKING DRAFT EQUITABLE MOBILITY FRAMEWORK

### WE CARE ABOUT



**Moving People & Goods**

**Indicators:** EFFICIENCY, TRANSPORTATION AFFORDABILITY, CONNECTIVITY, AVAILABILITY, RELIABILITY, ACCESSIBILITY, QUALITY



**Sustainability & Health**

**Indicators:** CLIMATE IMPACT, AIR QUALITY, HEALTH IMPACT



**Safety**

**Indicators:** TRAFFIC SAFETY, PERSONAL SAFETY



**Economic Opportunity**

**Indicators:** JOB CREATION, WORKING CONDITIONS, CONNECTED THRIVING LOCAL ECONOMY



**Equitable Transportation Planning Process**

**Indicators:** INCLUSIVE ENGAGEMENT AND OUTREACH, ACCOUNTABILITY AND EVALUATION

more public engagement and community input will be critical to further shape and design pricing options that truly advance equitable mobility.

**FOR MORE INFORMATION** and to sign up for updates about the POEM Project, visit [www.portland.gov/transportation/planning/pricing-options-equitable-mobilitypoem](http://www.portland.gov/transportation/planning/pricing-options-equitable-mobilitypoem)



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Executive summary

# Metro Regional Congestion Pricing Study

July 2021

## EXECUTIVE SUMMARY

### What is this study?

The Metro Regional Congestion Pricing Study explored whether congestion pricing can benefit the Portland metropolitan region. Congestion pricing was identified as a high priority, high impact strategy in the 2018 Regional Transportation Plan (RTP). A range of scenarios testing different congestion pricing tools helped regional policymakers understand if pricing can help support the region's four transportation priorities set out in the RTP – climate, congestion, equity, and safety, congestion.

### What was the project timeline?

This study took place over the course of approximately two years. The study included a review of existing conditions within the region, a definition of what scenarios would be considered, research of best practices and input from equity and congestion pricing experts, scenario analysis using Metro's regional travel demand model, the development of findings and the identification of next steps.



### What pricing strategies did Metro explore?

Metro explored if and how four congestion pricing strategies could support the region's priorities. When implemented, each of the pricing strategies could vary by time of day, by area/facility, by types of drivers on the road and by income levels. The four congestion pricing strategies are outlined at right.



#### VEHICLE MILES TRAVELED FEE

*Drivers pay a fee for every mile they travel*



#### CORDON PRICING

*Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)*



#### ROADWAY PRICING

*Drivers pay a fee to drive on a particular road, bridge or highway*



#### PARKING PRICING

*Drivers pay to park in certain areas*

## Who was involved?

This study was led by Metro staff,<sup>1</sup> working closely with the Transportation Policy Alternatives Committee (TPAC), which was the study's technical advisory committee, the Joint Policy Advisory Committee on Transportation (JPACT), which provided policy direction, and Metro Council, which provided policy direction and overall project guidance. The City of Portland and TriMet were funding partners in the study, and project staff collaborated regularly with the City of Portland and ODOT to leverage and align parallel congestion pricing efforts.

Study methods and findings were reviewed by Metro's Committee on Racial Equity (CORE), the Oregon Department of Transportation's Equity and Mobility Advisory Committee (EMAC), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and an international Expert Review Panel.<sup>2</sup>

## How does this relate to Metro's partners' work?

Metro, ODOT, and the City of Portland are all working on projects that consider ways to price transportation to address challenges related to equity, climate change, congestion, and safety. Each agency makes decisions for different parts of our region's transportation system. Each has separate projects underway to help address issues specific to those geographies. The three agencies are coordinating their efforts to leverage each other's work, learn from one another and share findings. The findings and analysis in this report provide a foundational understanding of how congestion pricing could perform in the Portland region and also provides important best practices for designing a pricing program that apply throughout the region and state.

## What are the takeaways from the Congestion Pricing Study?




Congestion pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 Regional Transportation Plan, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes. However, it depends how pricing is implemented in the region.

Metro used its travel demand model to conduct in-depth modeling and analysis to help regional policymakers understand the potential performance of different types of pricing tools (VMT, cordon, parking, and roadway). Each scenario was analyzed for how well it performed relative to the four regional priorities using performance metrics produced by the model.

<sup>1</sup> Metro hired a consultant team to support technical analysis and process for this work. The consultant team was led by Nelson\Nygaard and included Sam Schwartz Engineering, HNTB, Silicon Transportation Consultants, TransForm, Mariposa Planning Solutions and PKS International.

<sup>2</sup> Details on Expert Review Panel can be found here:  
<https://www.oregonmetro.gov/sites/default/files/2021/04/07/congestion-pricing-expert-panel-flyer-20210407.pdf>



RTP Goal	Performance Metric
<b>CONGESTION &amp; CLIMATE</b> 	Daily vehicle miles traveled
	Drive alone rate
	Daily transit trips
	Freeway vehicle hours of delay
	Arterial vehicle hours of delay
<b>CLIMATE</b> 	Greenhouse gas and other emissions
<b>EQUITY</b> 	Access to jobs by car
	Access to jobs by transit

Key findings from each scenario are described below.

## VMT

### ***Scenarios tested***

Two scenarios were modeled with a per mileage fee, which was applied to all drivers for every mile driven on every street in the Metropolitan Planning Area. VMT B added a charge of \$0.0685/mile, and VMT C added \$0.132/mile.

### ***Scenario results***

VMT scenarios performed well on all metrics at a regional scale, largely because all driving trips would be charged. Total travel cost would be the highest among the pricing tools studied, but those costs would be the most widely distributed compared to other pricing options.

### ***Equity spotlight***

Some Equity Focus Areas experienced a combination of higher costs without significant improvement in jobs access. Mobility improved in much of the region and jobs access improved. There were also reductions in harmful emissions.

### ***Future considerations***

A VMT pricing program should consider whether drivers who would pay more have viable alternatives to driving, and could focus on investments (transit, pedestrian, or bicycling infrastructure) or provide discounts or caps on charges for groups that would be disproportionately impacted, either because of where they live or their ability to pay.

# Cordon

## ***Scenarios tested***

A fee was applied to drivers entering into a specific area. Cordon A encompassed downtown Portland, South Waterfront, and parts of Northwest Portland. Cordon B included the entirety of Cordon A, as well as the Central Eastside Industrial District and the Lloyd District. Drivers who traveled through the cordon area, but remained on the freeways or highways, were not assessed a charge. The cordon charge was \$5.63.

## ***Scenario results***

The cordons studied resulted in relatively high mode shift to transit, indicating that adding a charge for drivers in areas with good transit infrastructure could successfully shift travel modes. However, the diversion onto the nearby uncharged facilities that increased vehicle delay and decreased job access by auto would need to be explored in greater depth.

## ***Equity spotlight***

Areas inside the cordon boundary experienced lower costs and higher jobs access because of the decreasing traffic within the cordon as drivers avoided through trips and diverted to throughways and arterials adjacent to the corridor. This would be a direct benefit to communities of color and low-income households that live within the cordon boundaries (the area within the cordon is considered an Equity Focus Area). However, for those same populations outside of the cordon area, delay increased and job access for drivers decreased. Additionally, those who drove into the cordon paid higher costs, even if they would benefit from improved travel times within the cordon. Costs were low at a regional scale, but high for the individuals who entered the cordon.

## ***Future considerations***

Cordon design considerations could include expanding the cordon area to encompass more origins and destinations, pairing cordon pricing with roadway pricing on key facilities near the cordon, providing a time-of-day charge, or providing discounts or exemptions for groups that would be disproportionately impacted. Improvements to arterials near the cordon to speed transit (such as bus only lanes) could also be considered.

# Parking

## ***Scenarios tested***

Increased parking charges were applied to all areas within the Metropolitan Planning Areas (MPA) boundaries that were assessed a parking charge in the 2018 RTP's 2040 Financially Constrained Scenario for both Parking A and Parking B scenarios. Parking A scenario marginally added the same parking costs; the Parking B scenario doubled the parking costs.

## ***Scenario results***

Overall, parking charging demonstrated positive results for all metrics at a regional level. The analysis shows that charging for parking could increase transit ridership – likely a direct result of charges generally being assessed in areas with good transit service and high employment. Charges were concentrated among fewer travelers compared to the VMT scenarios. While the total travel cost was low compared to other pricing scenarios, the cost to the individual drivers who parked was relatively high.

## ***Equity spotlight***

The parking scenarios showed very little change in jobs accessibility and costs throughout the region. The areas affected by parking charges have good transit service, so parking charges could be more easily avoided. Equity focus areas showed a smaller percent increase in jobs accessible by auto than non-equity focus areas.

## ***Future considerations***

The impacts to vulnerable populations should be carefully considered in a parking program, which could focus on discounts or caps on charges for key groups or revenue reinvestment to improve transit service.

# Roadway

## ***Scenarios tested***

Roadway charges were applied to drivers on highways limited access highways within the MPA boundaries. Roadway A included a charge of \$0.132/mile, while Roadway B included a charge of \$0.264/mile.

## ***Scenario results***

The two Roadway scenarios had mixed results at a regional level, with a reduction in VMT and reduced delay on the charged roadways coupled with increased delay to nearby non-charged roadways. Burdens and benefits were not uniformly distributed and could disproportionately impact travelers that live on the outskirts of the region.

## ***Equity spotlight***

Areas further from tolled throughways tend to experience worse access to jobs by auto, which include some EFA areas. With fewer options of using the faster tolled roadways and competing with traffic on arterials that diverted from those tolled roadways, commuters here experienced somewhat slower travel by autos and transit.

## ***Future considerations***

A roadway pricing program should focus on the impacts to delay on the throughways charged as well as the impacts to nearby non-charged roadways. Impacts at a localized scale would need to be examined to understand if there were investments (such as transit, bike, or pedestrian improvements) that could improve overall performance. In addition, the travel costs should be assessed at a granular scale to understand the impact on vulnerable groups.

## **The analysis showed:**

### **All four types of congestion pricing could help address congestion and climate priorities.**

- All eight scenarios reduce the drive alone rate, vehicle miles traveled, and greenhouse gas emissions.
- All scenarios increase daily transit trips. (Roadway A has a minimal increase.).
- In fact, the projected improvements were comparable to modeled scenarios with much higher investment in new transportation projects.

**Geographic distribution of benefits, impacts, and costs varied by scenario.**

- Traffic diversion, travel time savings, and costs to travelers varied by location and by congestion pricing tool.
- Without changes, some scenarios would have disproportionate impacts on equity communities and key geographies.
- Geographic distributions of benefits and costs can inform where to focus investments and affordability strategies.
- In-depth analysis will be necessary to understand benefits (who and where) and costs (who and where) of any future projects.

**There are tradeoffs for implementing pricing scenarios.**

- Our current transportation funding system will not achieve Metro's climate and equity goals. The tax structure is regressive and focuses on auto infrastructure that reinforces inequity and results in high emissions.
- Overall regional transportation costs and individual traveler costs vary by scenario
- All eight scenarios increase the overall cost for travel for the region, but some scenarios spread the costs widely while others concentrate them on fewer travelers. Those that spread the costs also have the highest overall cost for travel in the region and the highest revenue potential
- Higher overall transportation costs equal higher revenue which can allow investment in improvements to address safety and equity concerns.

A summary of findings is described on the next page.

**Table ES-1 Regional Congestion Pricing Study High-Level Findings**

RTP Goal	Metrics	VTM B	VTM C	COR A	COR B	PARK A	PARK B	RD A	RD B
<b>Congestion &amp; Climate</b>	Daily VMT								
	Drive Alone Rate								
	Daily Transit Trips								
	2HR Freeway VHD								
	2HR Arterial VHD								
<b>Climate</b>	Emissions								
<b>Equity</b>	Job Access (Auto)								
	Job Access (Transit)								
<b>Total Regional Travel Cost</b>		<b>Med-High</b>	<b>High</b>	<b>Med-Low</b>	<b>Med-Low</b>	<b>Low</b>	<b>Low</b>	<b>Med</b>	<b>Med</b>

Note: Dark blue indicates better alignment with regional goals when compared to the Base scenario

Legend		Daily VMT	Drive Alone Rate	Job Access (Auto)	Job Access (Transit)	Daily Transit Trips	2HR Freeway VHD	2HR Arterial VHD	Emissions
	Large Positive Change	-5% or more	-5% or more	10% or more	5% or more	10% or more	-10% or more	-10% or more	-5% or more
	Moderate Positive Change	-2% to -5%	-2% to -5%	5% to 10%	2% to 5%	5% to 10%	-5% to -10%	-5% to -10%	-2% to -5%
	Small Positive Change	-0.5% to -2%	-0.5% to -2%	1% to 5%	0.5% to 2%	1% to 5%	-1% to -5%	-1% to -5%	-0.5% to -2%
	Minimal Change	0.5% to -0.5%	0.5% to -0.5%	1% to -1%	0.5% to -0.5%	1% to -1%	1% to -1%	1% to -1%	0.5% to -0.5%
	Small Negative Change	0.5% to 2%	0.5% to 2%	-1% to -5%	-0.5% to -2%	-1% to -5%	1% to 5%	1% to 5%	0.5% to 2%
	Moderate Negative Change	2% to 5%	2% to 5%	-5% to -10%	-2% to -5%	-5% to -10%	5% to 10%	5% to 10%	2% to 5%
	Large Negative Change	5% or more	5% or more	-10% or more	-5% or more	-10% or more	10% or more	10% or more	5% or more

Note: "Positive" and "Negative" refer to progress toward regional goals, and not to numerical values (i.e., a reduction in VMT is "positive")

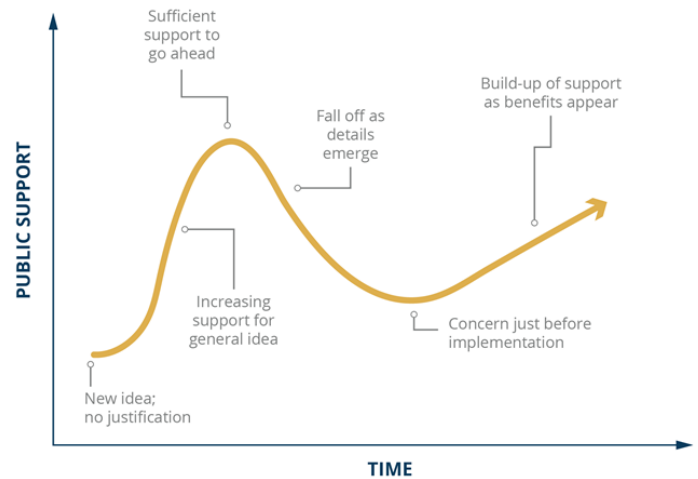
The results provided here ONLY show the effects of charging drivers under different scenarios; implementation of mitigations, discounts, or other changes to policies could result in changes to the performance of a scenario.

## What are the implementation considerations?

There are many factors for the Portland metro region and its partners to consider as the region continues to explore the feasibility of implementing congestion pricing:

- Public acceptance: all pricing programs are likely to struggle with public acceptance. There is a common perception that pricing is likely to hurt transportation disadvantaged populations and that people will pay more for something without seeing a benefit. Case studies have shown acceptance grows after a pricing program is implemented, as shown in the figure below. A concerted public engagement and marketing effort would likely be needed to garner acceptance of a congestion pricing project or program.

**Figure ES-1 Public Acceptance of Congestion Pricing Changes Over Time**

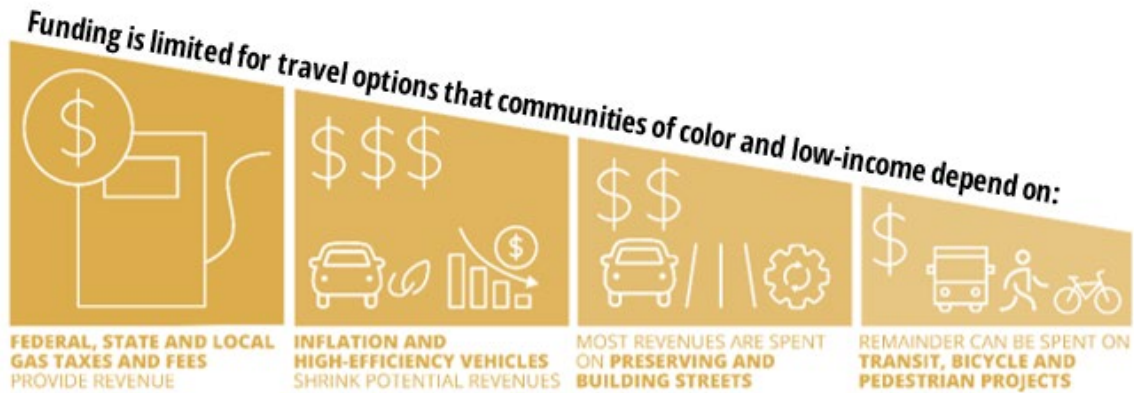


- Parking pricing is the easiest of the tools to implement since it leverages existing infrastructure and processes to introduce congestion pricing.
- Cordon pricing can leverage state of the art tolling and enforcement technologies, making implementation moderately difficult to implement.
- Although roadway pricing can leverage many tolling methods, enforcement can be difficult. Also, tolling roadways that are not limited access could be cost prohibitive, reflecting why arterial tolling is not typically priced considered.
- A VMT program could build off of the OReGO pilot but a major implementation barrier is enforcement and mandating vehicles to participate.
- A pilot phase might make sense for the Portland region to trial one or more technologies before scaling up to a region-wide system.

## How can Congestion Pricing address Equity?

Many people worry that congestion pricing will hurt those least able to pay. However, our current system is inequitable. Not only are transportation funding sources regressive, but spending is also focused on automobile infrastructure over other transportation modes, as shown in Figure ES-2 below. Gas tax rates are a fixed amount per gallon regardless of a driver's ability to pay, and motor vehicle fees in Oregon are not correlated to a motorist's income nor the value of the vehicle.

Figure ES-2 Inequities within Today's System



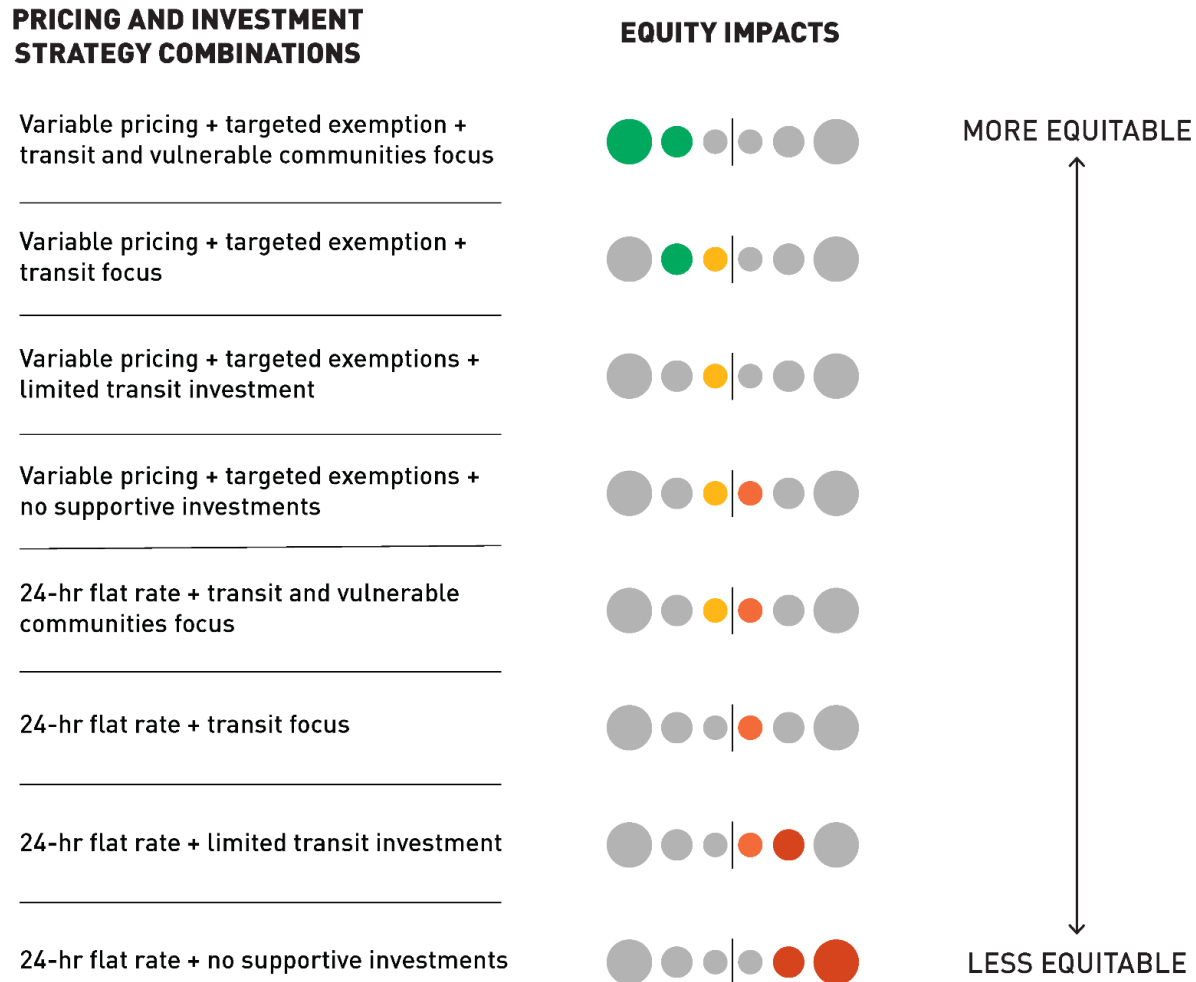
This focus favors those with more means and encourages driving. It reinforces inequity with spending focused on auto infrastructure. In addition, health impacts from high automobile reliance disproportionately harm Black, Indigenous, and People of Color (BIPOC) and low-income communities. Low-income people spend a much higher percentage of their income on transportation than high income earners. As it functions today, the current funding and spending structure will not help the region meet its urgent equity and climate goals.

Congestion pricing strategies have the potential to improve racial equity and benefit marginalized communities as well as all residents of the region. Congestion pricing tools have the potential to be more flexible than current funding in how funds are collected and what funds are spent on.

The biggest determinant of whether a congestion pricing program improves equity is how the program is designed-- how people are charged and how revenue from congestion pricing strategies is spent. A pricing program with the same charge can *improve* or *harm* equity depending on how it deals with affordability, the places it improves, and the type and locations of investments. An example of how this can be is shown as Figure ES-3 below.



Figure ES-3 Program Design Impact on Equity Outcomes



### ***Building an Equitable Pricing Program***

If carefully structured, congestion pricing can create a more fair and just transportation system, not just compared to the predominant revenue raising strategies used to pay for transportation today, but more directly to improve affordability, access, safety, and health of historically and currently excluded, impacted, and underserved communities. Congestion pricing programs and projects can improve equity outcomes by:

- Reducing harm and increasing benefits if agencies are willing to focus engagement on historically impacted residents and other stakeholders traditionally at a disadvantage and ensure they have a role in decision making at every step in the process.
- Revenue can be focused on equity outcomes. Revenues from congestion pricing can be invested in key neighborhoods or roadways, focused on transit, sidewalks, and bike lanes, or invested in senior and disabled services. Pricing benefits can be targeted to key locations where mobility improvements or air quality can be meaningfully improved.
- Affordability can be built into a program. Congestion pricing is more flexible than current funding sources. Exploring who pays and to what degree, and considering a

suite of affordability programs such as rebates or exemptions for low-income drivers, a “transportation wallet”, or other investments that address affordability.

**Figure ES-4 An Equity Framework for Road Pricing**



Source: TransForm 2017

As part of the Congestion Pricing Study, Metro reached out to three groups with expertise in equity: Metro's CORE, the City of Portland's POEM Task Force, and ODOT's EMAC to discuss and receive feedback on the RCPS methods for assessing equity benefits and impacts.

These groups confirmed that there are concerns around congestion pricing disproportionately impacting those least able to pay. They agreed that any pricing program must have meaningful

engagement with community and equity groups early. Combining their feedback with equity experts in the field helped clarify the importance of engagement and the importance of a project conducting in depth technical analysis (including mapping) to help determine who benefits and who is impacted by a program.

### ***Key findings from an equity perspective***

While the Equity Focus Areas see an increase in percent change of jobs accessible by auto in six of the eight scenarios, they benefit less than non-equity focus areas across the board. Related to access to community places, each pricing scenario results in increased access for equity focus areas and non-equity focus areas. Equity focus areas benefit more than non-equity focus areas for accessibility by auto for the cordon scenarios and the roadway scenarios. When it comes to change in access to community places by transit, the benefit to non-equity focus areas exceeds the benefit to equity focus areas for all scenarios.

Key findings from an equity perspective:

- Go beyond a toolkit
- Connect analysis to further study
- Design scenarios to address barriers
- Inform expenditure framework
- Develop supportive programs
- Establish pre- and post-deployment monitoring

## **What are the recommendations?**

Below are 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.

## What are the next steps?

Since its identification as a high priority, high impact strategy in the 2018 RTP, Metro staff and leaders endeavor to better understand how our region could use congestion pricing to manage traffic demand to meet climate goals without adversely impacting safety or equity. This study delineates the impacts pricing could have in helping the region:

- Reduce traffic congestion;
- Improve equity by reducing disparity;
- Enhance safety by getting to Vision Zero; and
- Support the climate by reducing greenhouse gas emissions.

The study's Expert Review Panel demonstrated that congestion pricing is effective in encouraging drivers to change their behavior (using more sustainable travel modes like transit, walking, or biking; driving less; and driving at different times) and reducing congestion and greenhouse gas emissions.

Leaders around the region and state should use the findings from this study to inform policies, including the development of the 2023 RTP and other transportation projects that may include congestion pricing in the future. We expect this study will inform the work of implementing agencies as they propose new congestion pricing projects at the local level.

Materials following this page were distributed at the meeting.



September 1, 2022

Metro Transportation Policy Alternatives Committee  
600 NE Grand Avenue  
Portland, OR 97232

Re: Regional Flexible Funds Allocation for 2025-2027

Dear TPAC Members:

I am writing to you today on behalf of the 40 Mile Loop Land Trust, a non-profit organization that has been advocating for the completion of the 40 Mile Loop for over 40 years. We are also advocates for many other trails in the Metro region and have been working with Metro for over 30 years to help develop Metro's Regional Trail System.

We fully support the list of trail projects included in the staff recommendations for RFFA funding as well as the projects recommended by staff for Metro bond funding. Collectively, the projects recommended will help complete the 40 Mile Loop and the entire network of trails in the Metro region.

We urge you to keep the list of trail projects recommended by Metro staff for RFFA funding intact. RFFA is unusual because it specifically allows the use of federal funds for active transportation projects outside of the right-of-way. Over the years RFFA funds have been used to accomplish great things such as the Marine Drive Trail at Blue Lake, part of the Springwater Corridor, the Peninsula Crossing Trail, the Gresham Fairview Trail, and portions of the Fanno Creek Trail. The staff recommended list for RFFA includes 5 trail projects funded with 32% of the RFFA funds available. Given the intended use of RFFA funds, that is not an unreasonable percentage. So, my caution to you is that any reduction made by shifting trail projects from RFFA to bond funding will be viewed as "backfilling" and, frankly, an affront to voters who supported trail projects through the 2019 Metro bond. And it would mean that an already full list of trail projects recommended for bond funding would have to be cut. Road projects within the right-of-way are important, but they have far more funding opportunities available to them than do trails. And in particular, moving the North Portland Greenway project (Cathedral Park to Columbia Blvd) to Metro bond funding makes little sense because that project is already federalized.

Please honor the processes that have led us to this point and support the lists of recommended projects that Metro staff Dan Kaempff provided to you on August 26th.

Sincerely,

Jim Sjulín  
Board Member  
40 Mile Loop Land Trust

c: Metro Council

**40-Mile Loop Land Trust**  
P.O. Box 9172  
Portland, OR 97207-0262  
[www.40mileloop.org](http://www.40mileloop.org)



# TPAC Agenda Item

## **September FFY 2023 Formal MTIP Amendment**

**Resolution 22-5283**

**Amendment # SP23-01-SEP**

**Applies to the 2021-26 MTIP**

Agenda Support Materials:

- Draft Resolution 22-5283
- Exhibit A to Resolution 22-5283 (MTIP Worksheets)
- Staff Narrative with one attachment

September 2, 2022

Ken Lobeck

Metro Funding Programs Lead



# September FFY 2023 Formal MTIP Amendment

## Overview: Clean-up & Positioning Amendment

- 15 total projects in the amendment bundle
  - Adding 3 new projects
  - Canceling 1 transit project
  - Adjusting and updating 11 transit projects
- Cover briefly amendment bundle contents and open for discussion
- Seek approval individually of Resolutions 22-5283

# September FFY 2023 Formal MTIP Amendment

## Overview: EOY Close-out & UZA Updated Apportionments

- Majority of project clean-up actions completed administratively as part of the end-of year (EOY) close-out process
- Some required changes significant and above the amendment matrix thresholds which triggered a formal/full amendment
- Transit received an updated funding apportionment for the Portland, OR-Wash Urbanized Area (UZA)
- Changes occurring now to complete for early FFY 2023 obligations or federal approval steps

# September FFY 2023 MTIP Amendment Bundle

## Adding 3 New Projects and Canceling 1 Project

- **ODOT - Key 22609: OR8: East Lane (Cornelius)**
  - New pedestrian safety improvement project
  - Install enhanced pedestrian crossing at East Lane including pedestrian ramps, sidewalk infill, striping, illumination, signage, median island to provide a safer place for pedestrians to cross
  - OTC approval on July 14, 2022
- **ODOT - Key 22613: Portland Metro and Surrounding Areas Safety Reserve**
  - Safety reserve bucket for urgent safety improvements
  - OTC approval on July 14, 2022

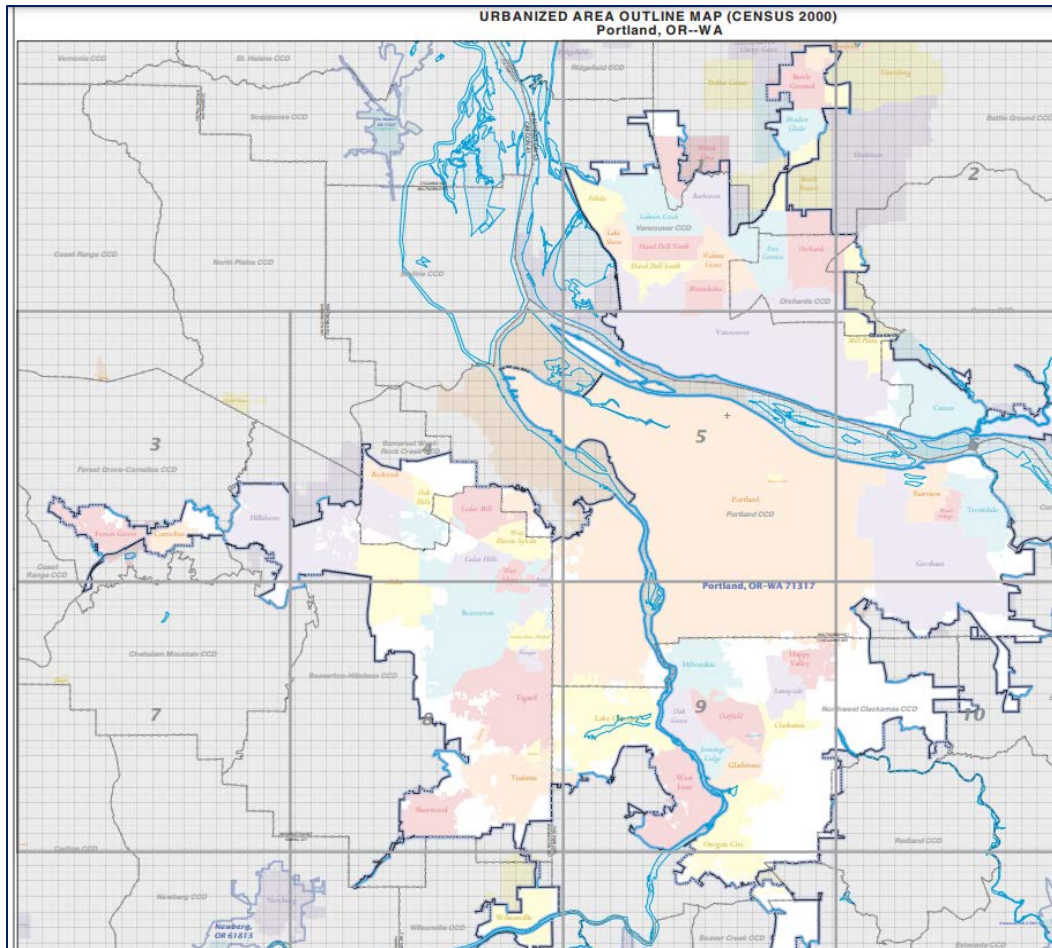
# September FFY 2023 MTIP Amendment Bundle

## Adding 3 New Projects and Canceling 1 Project

- **Multnomah County - Key 22645: Broadway Bridge Deck Replacement**
  - \$16.9 million ODOT Bridge Program award for construction phase
  - Replace the existing roadway deck, including streetcar rails on the bascule span and mechanical and electrical components (Br # 06757)
- **SMART - Key 22190: SMART Senior and Disabled Program (2022)**
  - 5310 funds traded with TriMet for FTA 5307 funds
  - Project is now being canceled

# September FFY 2023 Formal MTIP Amendment

## Portland, OR – Wash Urbanized Area & Apportionments



Portland, OR-Wash UZA includes the Metro 3- county area and Vancouver Washington area

FTA appropriates transit formula funds (5307, 5310, 5337, 5339, etc.) to the UZA.

TriMet, SMART, and C-Tran then split the funding by formula agreement

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

- Updated UZA FTA formula funds apportionment issue during summer 2022
- Many funding updates exceeded FTA's 30% administrative threshold for cost changes
- Past updates usually in the 5%-10% range
- TriMet, SMART, and C-Tran allocated via their UZA formula the updated fund apportionments for FTA Section 5307, 5310, 5337, and 5339 funds
- SMART and TriMet completed a fund exchange between their 5310 and 5307 funds

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

FTA 5307 Funds - Urbanized Area Formula Funding program:

- Eligible activities include planning, engineering, design and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement of buses, overhaul of buses, rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities; and capital investments in new and existing fixed guideway systems including rolling stock, overhaul and rebuilding of vehicles, track, signals, communications, and computer hardware and software. All preventive maintenance and some Americans with Disabilities Act complementary paratransit service costs are considered capital costs

FTA 5337 - State of Good Repair Grants Funds:

- Provides financial assistance to public transit agencies that operate rail fixed-guideway and high-intensity motorbus systems for the maintenance, replacement, and rehabilitation of capital assets, along with the development and implementation of transit asset management plans.

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

### FTA 5339 - Grants for Bus and Bus Facilities:

- The purpose of the funding is to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Eligible activities include capital projects to replace, rehabilitate and purchase buses, vans, and related equipment, and to construct bus-related facilities, including technological changes or innovations to modify low or no emission vehicles or facilities

### FTA 5310 - Enhanced Mobility of Seniors and Individuals with Disabilities

- The purpose of the funding is to improve mobility for seniors and individuals with disabilities by removing barriers to transportation service and expanding transportation mobility options. This program supports transportation services planned, designed, and carried out to meet the special transportation needs of seniors and individuals with disabilities in all areas



# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

### **SMART Corrective Actions:**

- ***FTA Section 5307 Funding Adjustments:***
  - Key 20874 - SMART Bus Purchase/PM/Amenities and Technology 2021: Increase 5307 funds
  - Key 22192 - SMART Bus Purchase/PM/ Amenities and Technology 2022: Increase 5307 funds
  - Key 22195 - SMART Bus Purchase/PM/ Amenities and Technology 2023: Increase 5307 funding
  - Key 22198 - SMART Bus Purchase/PM/ Amenities and Technology 2024: Increase 5307 funds

FTA 5307 Funds = Urbanized Area Formula Funding program:

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

### SMART Corrective Actions:

- ***FTA Section 5339 Funding Adjustments:***
  - Key 22191 – SMART Bus and Bus Facilities (Capital) 2022: Decrease 5339 funds and update description
  - Key 22194 - SMART Bus and Bus Facilities (Capital) 2023: Decrease 5339 funding and slip to FFY 2024

FTA 5339 Funds = Grants for Bus and Bus Facilities:

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

### **SMART Corrective Actions continued:**

- ***FTA 5310 Funding Adjustments:***
  - Key 22193 - SMART Senior and Disabled Program (2023):  
Decrease 5310 funding and description update
  - Key 22196 - SMART Senior and Disabled Program (2024):  
Decrease funding and update description

FTA 5310 Funds = Enhanced Mobility of Seniors and Individuals with Disabilities

# September FFY 2023 MTIP Amendment Bundle

## Updated Transit Apportionment Impacting TriMet & SMART

### TriMet Corrective Actions:

- ***Funding Adjustments to 5337, 5310, and STBG funding:***
  - Key 22181 - TriMet Bus and Rail Preventive Maintenance (2023): Increase 5337 funds
  - Key 22184 – Enhanced Seniors Mobility/ Individuals w/Disabilities (2023) 5310: Increase 5310 funding
  - Key 22164 – Preventive Maintenance Support (FFY 2023): Advance STBG funds to FFY 2023 and update description

Note: An error was noted on Key 22184. The total local match is \$722,372 reflecting a higher overmatch and not \$656,603 as shown on the MTIP worksheet. The correction has been made and the materials will be updated for JPACT.

# MPO CFR Compliance Requirements

## MTIP Review Factors

CFR = Code of Federal Regulations

- ✓ Project must be included in and consistent with the current constrained Regional Transportation Plan
- ✓ Passes fiscal constraint review and proof of funding verification
- ✓ Passes RTP consistency review:
  - Reviewed for possible air quality impacts
  - Verified as a Regionally Significant project status
  - Verified correct location & scope elements in the modeling network
  - Verified RTP and MTIP project costs consistent
  - Satisfies RTP goals and strategies
- ✓ MTIP & STIP programming consistency is maintained against obligations
- ✓ Passes MPO responsibilities verification (*No obligations/impacts*)
- ✓ Completed public notification plus OTC approval required completed for applicable ODOT funded projects (*OTC approval for July 14 meeting*)
- ✓ Examined how performance measurements may apply and if initial impact assessments are required. (*No impacts*)

# September FFY 2023 Formal Amendment

## Approval Timing

Action	Target Date
Start 30-day Public Notification/Comment Period	August 30, 2022
<b>TPAC Notification and Approval Recommendation</b>	<b>September 2, 2022</b>
JPACT Approval and Recommendation to Council	September 15, 2022
End 30-day Public Notification/Comment Period	September 28, 2022
Metro Council Approval	October 6, 2022
Final Estimated Approvals	End of October 2022

### Notes:

1. The above target dates are planning estimates only. Changes may occur.
2. Processing and approval through JPACT and Metro Council are proposed as agenda consent items
3. Comments via letters or personal testimony still may be submitted at the scheduled committees.

# September FFY 2023 Formal MTIP Amendment

## Discussion, Questions, and Approval Request

- Open up to discussion and Questions
- Approval request includes completing necessary corrections
- Approval Request:  
Staff request is for TPAC provide JPACT an approval recommendation of Resolution 22-5283 consisting of additions or changes to 15 projects enabling federal reviews and fund obligations to then occur in early Fall of 2022



Metro

# **2025-2027 Regional Flexible Funds: TPAC recommendation to JPACT**

Presentation to TPAC

September 2, 2022



# Purpose

- Present and discuss staff recommendation
- Discussion of any proposed changes or alternative recommendations
- **ACTION** to recommend 25-27 RFFA Step 2 funding package to JPACT

# Process for selecting projects

## Bond:



## RFFA:



# RFFA staff recommendation

- Focus on Equity and Safety outcomes
- Based on Example 2 from August discussions
- Invests throughout the region; top 2 priority projects from Portland and counties
- 10 projects in total

# Staff recommendation includes:

- 162<sup>nd</sup> Ave: \$7.58M
- 148<sup>th</sup> Ave: \$7.1M
- I-205 MUP: \$1.1M
- Council Creek Trail: \$5.5M
- 57<sup>th</sup> Ave-Cully Blvd: \$7.64M
- Sandy Blvd: \$6.5M
- Willamette Falls Drive: \$3.5M
- NP Greenway (Columbia to Cathedral): \$4.86M
- Beaverton Creek Trail: \$2.05M
- Fanno Creek Trail: \$1.6M

# Parks Bond recommendation

- 12 projects as indicated in the materials
- TPAC, JPACT have reviewed and provided input
- If necessary, may be revised based on today's RFFA discussion

# Resolution 22-5284

- Step 1: \$105,400,186 (investments previously identified in RFFA Program Direction, IIJA funding memo)
- Step 2: \$47,300,000 (pending TPAC recommendation, JPACT approval)
- **Total 2025-27 RFFA: \$152,700,186**

# Recommendation to JPACT

- TPAC can follow staff recommendation;  
OR
- Present and discuss alternative approaches for a recommendation to JPACT

**Thank you!**

**[oregonmetro.gov/RFFA](https://oregonmetro.gov/RFFA)**

[daniel.kaempff@oregonmetro.gov](mailto:daniel.kaempff@oregonmetro.gov)

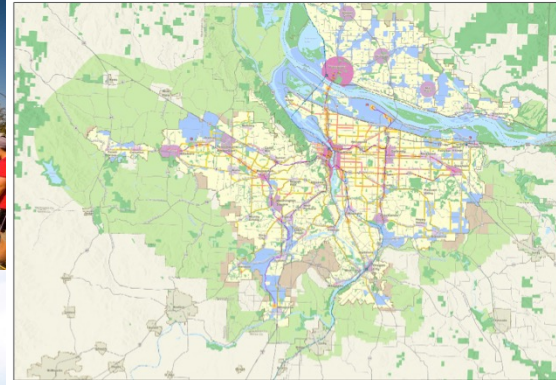
[robert.spurlock@oregonmetro.gov](mailto:robert.spurlock@oregonmetro.gov)



# 2023 Regional Transportation Plan Update

TPAC

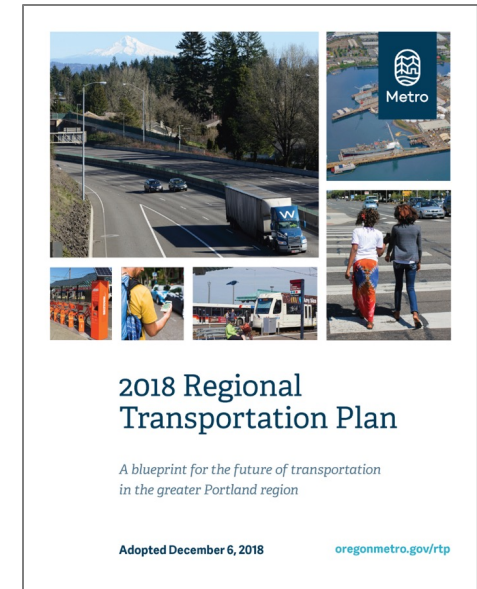
September 2, 2022



# What is the Regional Transportation Plan (RTP)?

## 20+ year transportation plan

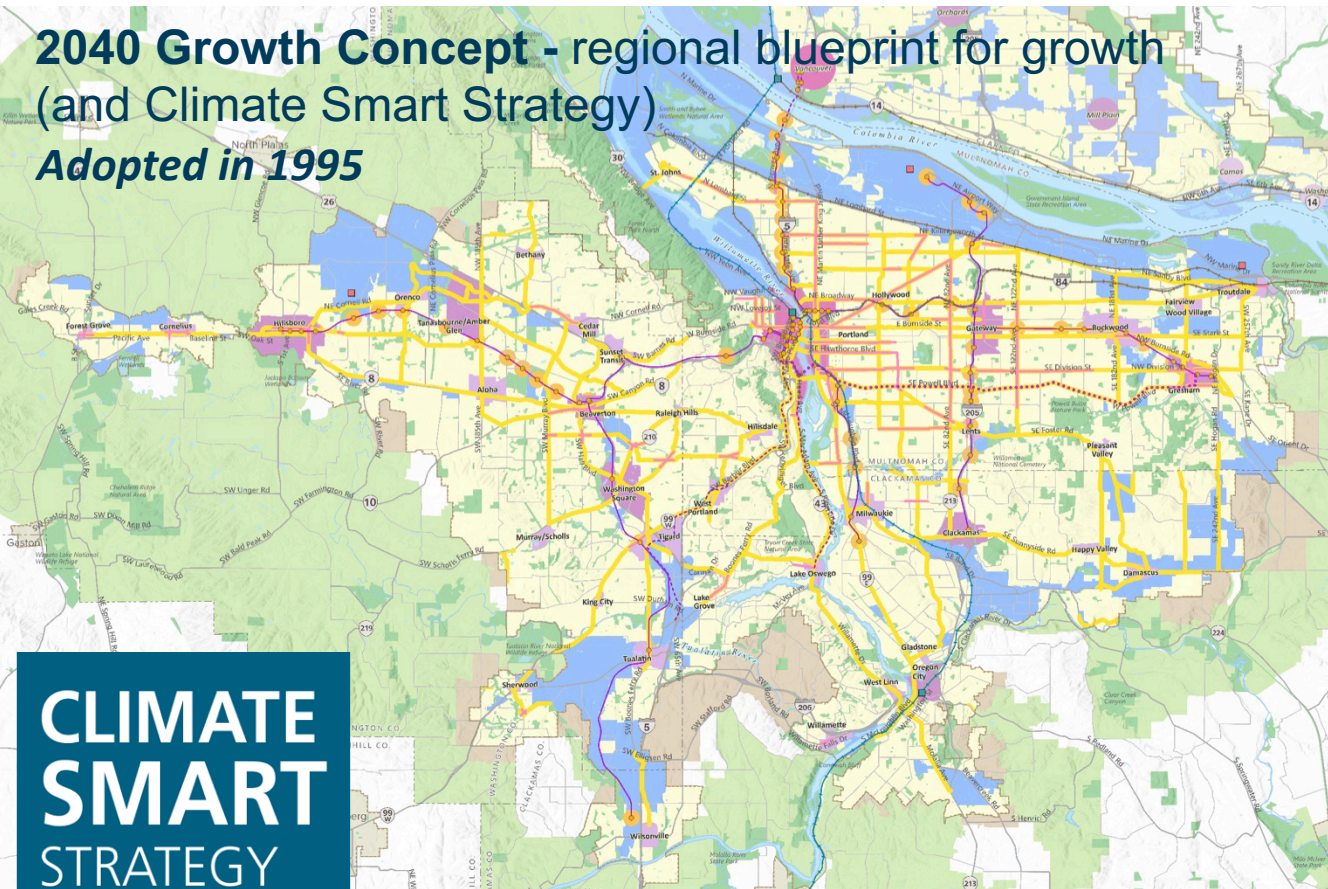
- Sets the vision and goals for moving people and goods safely, reliably and affordably for decades to come
- Uses projections of future population and job growth to identify travel needs and solutions through 2045
- Includes policies and projects
- Coordinates local, regional, and state investments on regional system
- Establishes priorities for federal and state funding





# The RTP is a key tool for implementing the 2040 Growth Concept and Climate Smart Strategy

**2040 Growth Concept - regional blueprint for growth**  
(and Climate Smart Strategy)  
*Adopted in 1995*

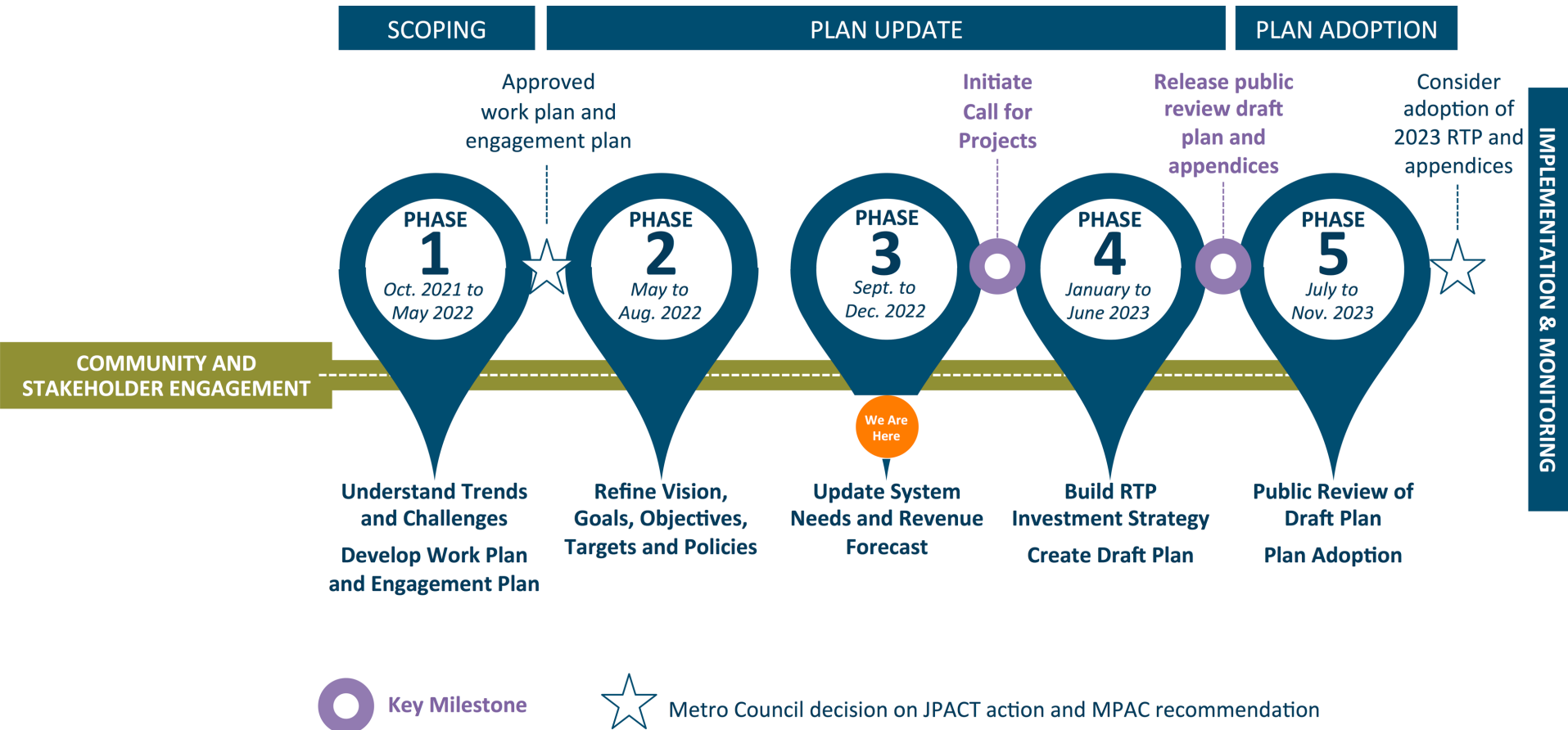


Implemented through adopted community and regional plans



Building toward  
six desired outcomes

# 2023 RTP timeline



# How are community, business and partners being engaged?

**Metro  
advisory  
committees**

**Community  
leaders  
forums**

**Business  
roundtables**

**TPAC and  
MTAC  
workshops**

**Community  
partner-led  
engagement**

**Freight study  
advisory  
committee**

**JPACT/Council  
workshops**

**Community  
stories and  
video tours**

**Topical/small  
group  
discussions**

**County  
coordinating  
committees**

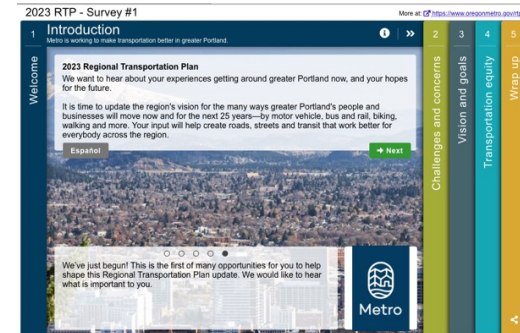
**Online  
surveys**

**Information  
sessions**

**Tribe and  
Agency  
Consultations**

**Expert  
panels**

**Digital  
outreach**



# RTP workshop series for JPACT and the Metro Council

**1** Updating Our Vision and Goals  
For the Future of Transportation

6/30/22

**2** Developing Regional  
Congestion Pricing Policy

7/28/22

**3** Creating Safe and Healthy  
Urban Arterials

9/29/22

**4** Strengthening the Backbone  
of Regional Transit

10/27/22

**5** Working Together to Tackle  
Climate Change

11/10/22



**The workshops for JPACT and the Metro Council will be livestreamed on YouTube from 7:30-9:30 AM.**



# Refine policy framework

May to August 2022

PHASE

2

May to  
Aug. 2022

## WHAT WE ARE DOING

- Refine vision, goals, objectives and targets
- Update policies related to key topics
- Engage the community on needs and priorities
- Begin evaluating current conditions and implementation of Climate Smart Strategy

This work is planned to continue in Phase 3



**Outcome:** Updated vision, goals, objectives and policies to guide plan update

# Revenue and needs analysis

August to December 2022

PHASE

3

Sept. to  
Dec. 2022

## WHAT WE ARE DOING

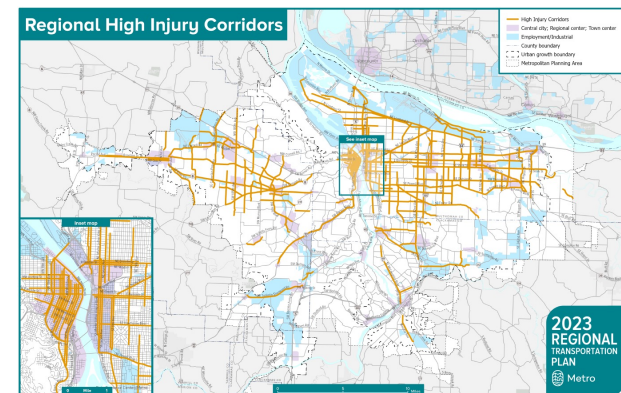
Document regional transportation needs and identify investment priority gaps

Update forecast of revenues anticipated to pay for priority investments

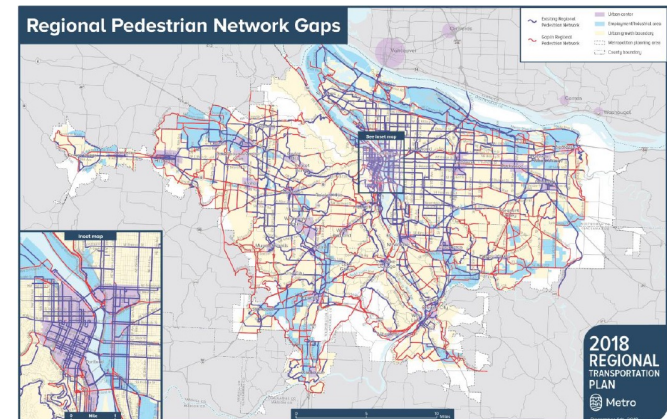
Set funding level for the RTP investment strategy (“Constrained” list and “Strategic” list)

Define process for updating RTP project and program priorities

Draft 2023 RTP High Injury Corridors (2016-2020)



2018 RTP Pedestrian Network Gaps



**Outcome:** Updated constrained revenue forecast and needs/gaps assessment



# Build RTP Investment Strategy

Jan. to June 2023



- |                      |  |
|----------------------|--|
| <b>Jan. 6</b>        | Official <b>call for projects and programs</b> released and <b>on-line project database system</b> available   |
| <b>Jan. 29</b>       | <b>Deadline:</b> Lead agencies <b>submit preliminary list of priority projects and programs</b>  |
| <b>Feb. 17</b>       | <b>Deadline:</b> Lead agencies <b>submit required project information</b> through online system, <b>Form A</b> on public engagement and <b>endorsement letters from governing body and coordinating committees</b> |
| <b>March – April</b> | Metro staff <b>evaluates investment packages</b> and <b>seeks public feedback</b> on draft project list  |
| <b>May – June</b>    | JPACT and Metro Council discuss results and public input and provide feedback on finalizing public review draft plan <sup>9</sup>  |

# What agencies can do now to begin preparing for the Call for Projects

- ❑ Confirm your agency's the RTP Hub lead
- ❑ Review the current list to identify potential updates and new projects
- ❑ Schedule time with your governing body
- ❑ Begin completing Form A
- ❑ Participate in the on-line RTP Hub training this fall
- ❑ Contact Metro staff with questions

## Metro staff contacts for the Call for Projects

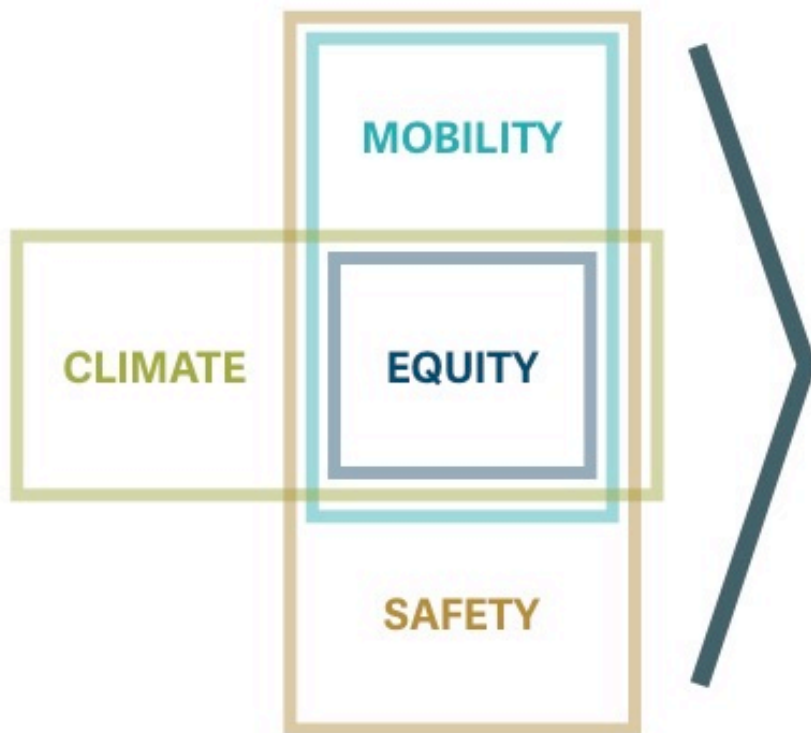
**Ally Holmqvist**

[ally.holmqvist@oregonmetro.gov](mailto:ally.holmqvist@oregonmetro.gov)

**Lake McTighe**

[lake.mctighe@oregonmetro.gov](mailto:lake.mctighe@oregonmetro.gov)

# Draft Vision and Goals for 2023 RTP



## Vision →

Everyone in the greater Portland region will have **safe, reliable and affordable travel options** that support **equitable, resilient, healthy and economically vibrant communities**.

# Draft Goals



Goals →

## **EQUITABLE TRANSPORTATION**

Transportation system disparities experienced by Black, Indigenous and other people of color and people with low incomes, are eliminated.

## **CLIMATE RESILIENCE**

People, communities and ecosystems are healthy and resilient, carbon emissions and other pollution are reduced and travel by transit, walking and bicycling is increased.

## **SAFE SYSTEM**

Serious crashes are eliminated and people are safe and secure when traveling in the region.

## **MOBILITY OPTIONS**

People and businesses can reach the goods, services and opportunities they need by affordable travel options that are safe, connected, convenient, reliable, accessible, and welcoming for all.

# Equity Goal

## Draft Goal 1



Equitable  
Transportation

Transparency  
and  
Accountability

Consolidates 2018 RTP Goals 9 and 11

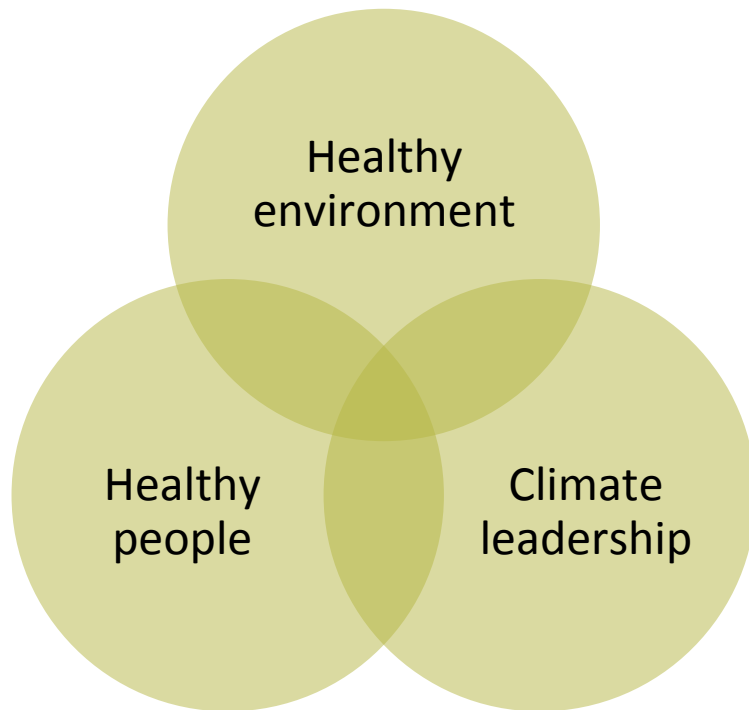


**Equitable  
Transportation**

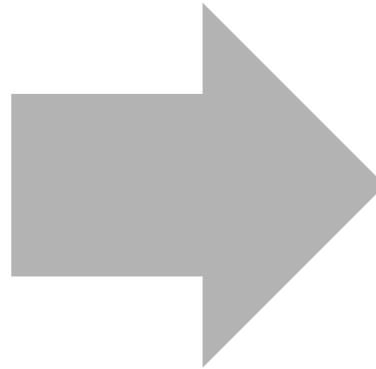
*Transportation system disparities experienced by Black, Indigenous and other people of color and people with low incomes, are eliminated.*

8/26/22

# Climate Goal



Consolidates 2018 RTP Goals 6, 7 and 8



## Draft Goal 2



*People, communities and ecosystems are healthy and resilient, carbon emissions and other pollution are reduced and travel by transit, walking and bicycling is increased.*

8/26/22

# Safety Goal

## Draft Goal 3

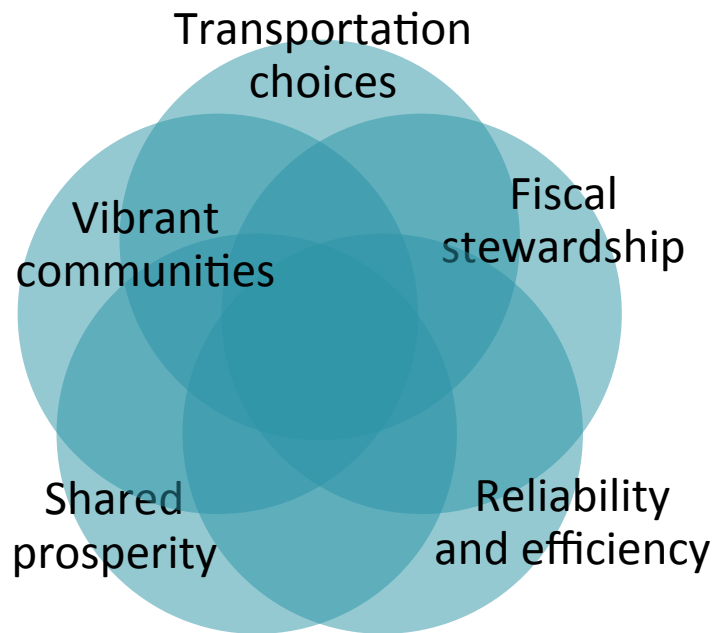
Safety and Security

Revises 2018 RTP Goal 5

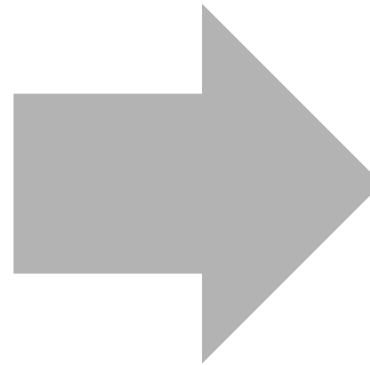
**Safe  
System**

*Serious crashes are eliminated and people are safe and secure when traveling in the region.*

# Mobility Goal



Consolidates 2018 RTP Goals 1, 2, 3, 4 and 10



## Draft Goal 4



*People and businesses can reach the goods, services and opportunities they need by affordable travel options that are safe, connected, convenient, reliable, accessible, and welcoming for all.*

8/26/22



# Questions or feedback?

## Feedback on the vision and goals

- Anything important missing?
- Suggestions for ways to improve them?

## Questions on the process?

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



**Kim Ellis, AICP**  
RTP Project Manager  
[kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov)

**Molly Cooney-Mesker**  
RTP Engagement Specialist  
[molly.cooney-mesker@oregonmetro.gov](mailto:molly.cooney-mesker@oregonmetro.gov)

[oregonmetro.gov/rtp](http://oregonmetro.gov/rtp)



Metro

# RTP Pricing Policy Development

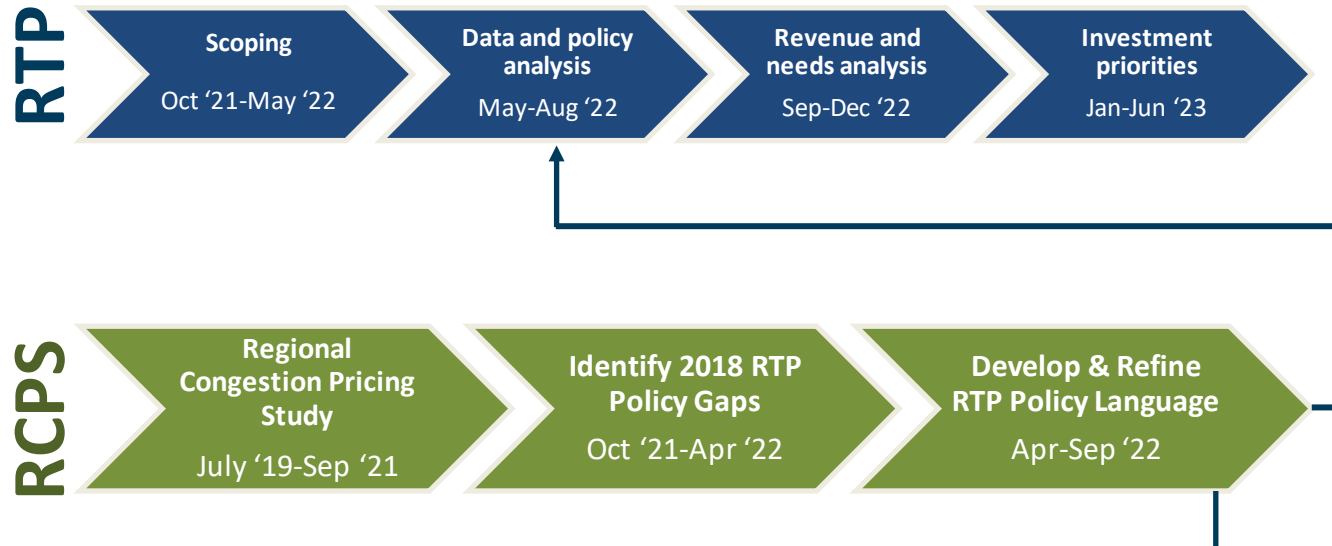
*TPAC*

September 02, 2022

# Pricing Policy Development

- Schedule for 2023 RTP update
- Review July TPAC workshop
- Revised 2023 RTP policy recommendations
- JPACT request for OHP comment letter
- Next Steps

# 2023 RTP Update Schedule



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

# 2023 RTP Update Work To Date

Date	Meeting	Topic
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
7.28.22	JPACT/Council Workshop	Introduce Draft 2023 RTP Policy and Action Items



# Questions for TPAC

- Are there still gaps in the revised policy that you would like to see addressed?
- Are there any additional specific changes would you like to see to improve the revised policy language?
- Do you generally support advancing the proposed language to the next phase of RTP development?

# July 13, 2022 TPAC Workshop

- Provided revised draft 2023 RTP pricing policies and new action items
- Requested input from TPAC on revised draft policies and action items



# What We Heard from TPAC - Addressed

- Reframe – Pricing instead of Congestion Pricing
- Better address revenue reinvestment
- Include language on freight, and on other pricing programs (such as Waterfall Corridor timed-use permits)
- Include description of which jurisdictions might implement pricing
- Remove/adjust references to EFAs and high injury corridors
- Revisions to policies and actions
- Policy 6 should focus on user experience, not emerging tech

# What We Heard from TPAC – Not Yet Addressed

- Policy background/context and connection to the RCPS and the action items
- Clarification on how policies and actions relate to RTP goals and objectives
- How different pricing projects can be regionally coordinated.

# What We Heard from TPAC – Not Addressed

- Separate actions from policies – group action items together at end of section
- Remove changes to motor vehicle network policies
- Remove language around VMT reduction
- Change “diversion” to “rerouting” and define what level of diversion is an impact that warrants addressing

# New Introduction Section

- Types of pricing, what jurisdictions might implement
- Why is pricing important?
- Benefits to freight and businesses
- Revenue reinvestment
- Constitutional restrictions
- Other state and regional pricing work
- Federal pricing programs
- Regional Congestion Pricing Study summary

# Other Changes to Policy Language

- Revisions to policies and action items to reflect input
- Refocus Policy 6 more on user experience
- Action items are now numbered
- Placeholder for additional policy context
- Direction for additional work on Chapter 8
- Continue coordination with OHP amendment

# Draft RTP Congestion Pricing Policies

**Policy 1**    **Mobility:** Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.

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

**Policy 3**    **Safety:** Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.

**Policy 4**    **Diversión:** Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.

**Policy 5**    **Climate:** Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.

**Policy 6**    **Technology and User Experience:** Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

# Questions for TPAC

- Are there still gaps in the revised policy that you would like to see addressed?
- Are there any additional specific changes would you like to see to improve the revised policy language?
- Do you generally support advancing the proposed language to the next phase of RTP development?

# Oregon Highway Plan Toll Policy Amendment – JPACT Comment Letter

- OHP public comment period ends 9/15
- At 8/18 meeting, JPACT requested that staff develop a comment letter to address regional concerns
- Draft letter shared after this meeting
- Comments requested by EOD Wednesday, 9/7
- Letter will be shared with JPACT in advance of 9/15 meeting

- Local & Regional Partnership
- Revenue Allocation
- Definition of Project & Corridor
- Diversion



# Next Steps – RTP Update

9.13.22	Council Work Session	Revised 2023 RTP Policy and Action Items
9.15.22	JPACT	
9.21.22	MTAC	
9.28.22	MPAC	

# Next Steps – RTP Update

- Friday, October 28 - Provide written feedback
- Update policies and incorporate in RTP chapter updates
- Chapter updates brought to TPAC late winter / early spring

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

**[oregonmetro.gov/rtp](https://oregonmetro.gov/rtp)**

Alex Oreschak, RTP Congestion Pricing Policy Lead: [alex.oreschak@oregonmetro.gov](mailto:alex.oreschak@oregonmetro.gov)

Kim Ellis, RTP Project Manager: [kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov)

