



600 NE Grand Ave.
Portland, OR 97232-2736

Joint Policy Advisory Committee on Transportation (JPACT) agenda

Thursday, September 15, 2022

7:30 AM

<https://zoom.us/j/91720995437> (Webinar
ID: 917 2099 5437) or 877-853-5257 (Toll
Free)

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

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

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-813-7591 or email at legislativecoordinator@oregonmetro.gov.

2. Public Communications (7:35 AM)

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

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

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

4. Consent Agenda (7:45 AM)

- 4.1 Resolution No. 22-5283, 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)

[COM](#)
[22-0598](#)

Attachments: [JPACT Worksheet](#)
[Resolution No. 22-5283](#)
[Exhibit A](#)
[JPACT Staff Report](#)
[Attachment 1](#)

- 4.2 Consideration of the August 18, 2022 JPACT Minutes

[COM](#)
[22-0606](#)

Attachments: [8.18.22 JPACT Minutes](#)

5. Action Items (7:50 AM)

- 5.1 Resolution No. 22-5284, For the Purpose of Allocating \$152.7 Million of Regional Flexible Funding for the Years 2025-2027, Pending Adoption of the 2024-2027 Metropolitan Transportation Improvement Program (MTIP) (7:50 AM)

[COM](#)
[22-0599](#)

Presenter(s): Dan Kaempff (he/him), Metro

Attachments: [Worksheet](#)
[Draft Resolution 22-5284](#)
[Draft Staff Report](#)
[Exhibit A](#)
[Exhibit B](#)
[RFFA Memo to JPACT](#)

6. Information/Discussion Items (8:20 AM)

- 6.1 2023 Regional Transportation Plan (RTP) Vision & Goals (8:20 AM) [COM](#)
[22-0600](#)

Presenter(s): Kim Ellis (she/her), Metro

Attachments: [JPACT Worksheet](#)
[Draft Vision Goals 2023 RTP](#)
[RTP Workshop 1 063022 Summary](#)

- 6.2 Regional Congestion Pricing Policy (8:50 AM) [COM](#)
[22-0601](#)

Presenter(s): Alex Oreschak (he/him), Metro

Attachments: [JPACT Worksheet](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)

7. Updates from JPACT Members (9:25 AM)

8. Adjourn (9:30 AM)

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964, Title II of the Americans with Disabilities Act, Section 504 of the Rehabilitation Act and other statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit oregonmetro.gov/civilrights or call 503-797-1890. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1890 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. Individuals with service animals are welcome at Metro facilities, even where pets are generally prohibited. For up-to-date public transportation information, visit TriMet's website at trimet.org

Thông báo về sự Metro không kỳ thị của

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

Повідомлення Metro про заборону дискримінації

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

Metro 的不歧視公告

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

Ogeysiiska takooris la'aanta ee Metro

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

Metro의 차별 금지 관련 통지서

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

Metro의 差別禁止通知

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

សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច័ន្ទ) មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

إشعار بعدم التمييز من Metro

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

Paunawa ng Metro sa kawalan ng diskriminasyon

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

Notificación de no discriminación de Metro

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

Уведомление о недопущении дискриминации от Metro

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

Avizul Metro privind nediscriminarea

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

Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

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

2022 JPACT Work Program

As of 8/31/2022

Items in italics are tentative

<p><u>September 15, 2022</u></p> <ul style="list-style-type: none"> Resolution No. 22-5283, 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) (consent) Resolution No. 22-5284 For the Purpose of Allocating \$152.7 Million of Regional Flexible Funding for the Years 2025-2027, Pending Adoption of the 2024-2027 Metropolitan Transportation Improvement Program (Dan Kaempff (he/him), Metro; 30 min) (action) 2023 Regional Transportation Plan (RTP) Vision & Goals (Kim Ellis (she/her), Metro; 30 min) Regional Congestion Pricing Policy (Alex Oreschak (he/him), Metro; 30 min) <p><i>September 29th- RTP Council/JPACT Workshop 7:30am-9:30am</i></p> <ul style="list-style-type: none"> Safe and Healthy Urban Arterials (John Mermin & Lake McTighe, Metro) 	<p><u>October 20, 2022</u></p> <ul style="list-style-type: none"> Burnside Bridge- Vote (Alex Oreschak, Metro; Megan Neil, Multnomah County) (action) <i>TriMet Forward Together service hours restoration plan (TriMet Staff; 20 min)</i> 2023 RTP – Finance Plan & Equitable funding Research (Lake McTighe & Ted Leybold, Metro) Regional Mobility Policy Update Discussion – Draft Recommended Policy for 2023 RTP (Kim Ellis, Metro and ODOT staff; 30 min) <p><i>October 27th- RTP Council/JPACT Workshop 7:30am-9:30am</i></p> <ul style="list-style-type: none"> High-Capacity Transit Strategy Update/Future of Transit in the Region (Ally Holmqvist, Metro)
<p><u>November 17, 2022</u></p> <ul style="list-style-type: none"> <i>Carbon Reduction Program (action)</i> Regional Mobility Policy Update – Recommended Policy for 2023 RTP (Kim Ellis (she/her), Metro; 20 min) RTP - Call for Projects for 2023 RTP, Needs Assessment, (Kim Ellis, Metro) & RTP Financial Plan: Revenue Forecast (Ted Leybold (he/him), Metro; 60 min min) <i>Transit Oriented Development (Andrea Pastor, Metro)</i> 	<p><u>December 15, 2022</u></p> <ul style="list-style-type: none"> <i>Rose Quarter MTIP Amendment (action)</i> <i>RTP Call for Projects</i> <i>Climate Smart Strategy Update</i> Freight Commodity Study (Tim Collins, Metro) Sunrise Community Vision Project – <i>Tentative (Clackamas County)</i>

<p><i>November 10th- RTP Council/JPACT Workshop 7:30am-9:30am</i></p> <ul style="list-style-type: none"> • Climate Smart Strategy Update (Kim Ellis (she/her), Metro, Eliot Rose (he/him), Metro, Thaya Patton, Metro) 	
---	--

Parking Lot:

- *Hwy 26/Westside Transportation Study – briefing (20 min, Matt Bihn & ODOT)*
- *Regional Emergency Transportation Routes Update Phase 2 (John Mermin, Metro and Laura Hanson, RDPO)*
- *82nd Avenue – Elizabeth Mros-O’Hare, Metro and City of Portland*
- *RTP - High Capacity Transit Strategy Update for 2023 RTP (Ally Holmqvist, Metro) (January 2023)*
- *82nd Avenue Project Update – Elizabeth Mros Ohare - City of Portland (Fall 2022)*
- *Burnside Bridge- Vote (Alex Oreschak, Metro; Megan Neil, Multnomah County)*

4.1 Resolution No. 22-5283, 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)

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, September 15, 2022

JPACT Worksheet

Agenda Item Title: September FFY 2023 MTIP Formal Amendment & Resolution 22-5283 Approval Request

Presenters: N/A – Request to proceed via Consent Calendar

Contact for this worksheet/presentation: Ken Lobeck, Funding Programs Lead
Ken.lobeck@oregonmetro.gov

Purpose/Objective

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)

Outcome

Eventual final approval from FHWA and FTA to add the projects or make to required changes to existing MTIP projects enabling federal approvals or phase obligations to occur where the MTIP and STIP are part of the approval steps.

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

N/A. This is the first time the September FFY 2023 MTIP Formal Amendment bundle has been presented to JPACT

Note: TPAC received their amendment notification and overview on September 2, 2022 and provided an approval recommendation to JPACT

What packet material do you plan to include?

- Draft Resolution 22-5283
- Exhibit A to Resolution 22-5283 (MTIP Worksheets)
- Staff Report/narrative with one attachment

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING NEW OR) RESOLUTION NO. 22-5283
AMENDING EXISTING PROJECTS IN THE 2021-)
26 METROPOLITAN TRANSPORTATION) Introduced by: Chief Operating Officer
IMPROVEMENT PROGRAM (MTIP) TO) Marissa Madrigal in concurrence with
COMPLETE REQUIRED PHASE SLIPS AND) Council President Lynn Peterson
MAKE REQUIRED CORRECTIONS TO MEET)
FALL OBLIGATIONS OR FEDERAL APPROVAL)
STEPS (SP23-01-SEP))

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 22-5283 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 22-5283 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.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

2021-2026 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 22-5283

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 # 22609 MTIP ID TBD	ODOT	OR8: East Lane (Cornelius) (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.	<u>ADD NEW PROJECT:</u> The Formal Amendment adds the OTC approved safety project to the MTIP
ODOT Key # 22613 MTIP ID TBD	ODOT	Portland Metro and Surrounding Areas Safety Reserve (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.	<u>ADD NEW PROJECT:</u> The Formal Amendment adds the OTC approved safety project to the MTIP
ODOT Key # 22645 MTIP ID TBD	Multnomah County	Broadway Bridge Deck Replacement (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)	<u>ADD NEW PROJECT</u> The Formal Amendment adds the new project with ODOT Bridge program awarded funding.

ODOT Key # 20874 MTIP ID 70904	SMART	SMART Bus Purchase/PM/Amenities and Technology 2021	Maintenance and Bus Fleet Replacement and Software	<u>INCREASE FUNDS:</u> Increase authorized FTA Section 5307 funds to the project per updated UZA apportionments
ODOT Key # 22190 MTIP ID 71134	SMART	SMART Senior and Disabled Program (2022)	Services and Facility Improvements for Elderly and Disabled Customers	<u>CANCEL PROJECT:</u> Key 22190 is canceled as SMART has traded funds with TriMet. Key 22190 is no longer a project.
ODOT Key # 22191 MTIP ID 71139	SMART	SMART Bus and Bus Facilities (Capital) 2022	Bus and Bus Facility Upgrades 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	<u>FUNDING AND DESCRIPTION:</u> Decrease authorize FTA section 5339 fund s and expand description per FTA guidance
ODOT Key # 22192 MTIP ID 71144	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	Maintenance and Bus Fleet Replacement and Software	<u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project per the updated UZA Apportionment letter
ODOT Key # 22193 MTIP ID 71135	SMART	SMART Senior and Disabled Program (2023)	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.	<u>DECREASE FUNDING:</u> 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 # 22194 MTIP ID 71140	SMART	SMART Bus and Bus Facilities (Capital) 2023	Bus and Bus Facility Upgrades 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	<u>SLIP & FUNDING:</u> Decrease projected authorized 5339 funds and slip project to FFY 2024

<p>ODOT Key # 22195 MTIP ID 71145</p>	<p>SMART</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2023</p>	<p>Maintenance and Bus Fleet Replacement and Software</p>	<p><u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project</p>
<p>ODOT Key # 22196 MTIP ID 71136</p>	<p>SMART</p>	<p>SMART Senior and Disabled Program (2024)</p>	<p>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.</p>	<p><u>DECREASE FUNDING:</u> 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 # 22198 MTIP ID 71146</p>	<p>SMART</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2024</p>	<p>Maintenance and Bus Fleet Replacement and Software</p>	<p><u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project</p>
<p>ODOT Key # 22164 MTIP ID 71103 (Note: New ODOT Key to be assigned)</p>	<p>TriMet</p>	<p>Transit Oriented Development (TOD) program (FFY 2023) Preventive Maintenance Support (FFY 2023)</p>	<p>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</p>	<p><u>SCOPE ADJUSTMENT & ADVANCE:</u> 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 # 22181 MTIP ID 71210</p>	<p>TriMet</p>	<p>TriMet Bus and Rail Preventive Maintenance (2023)</p>	<p>Capital Maintenance For Bus And Rail for continued service</p>	<p><u>ADD FUNDING:</u> Increase authorized 5337 funds based on revised FFY 2023 FTA UZA estimates</p>

ODOT Key # 22184 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	<u>ADD FUNDING:</u> Increase authorized 5310 funds based on revised FFY 2023 FTA UZA estimates
--	--------	--	--	--

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. 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
Federal Funds								
AC-STBGS	ACP0	2023		\$ 190,800				\$ 190,800
AC-STBGS	ACP0	2023					\$ 709,200	\$ 709,200
								\$ -
Note: Federal share is set at 90%							Federal Totals:	\$ 900,000
State Funds								
State	Match	2023		\$ 21,200				\$ 21,200
State	Match	2023					\$ 78,800	\$ 78,800
								\$ -
Note: Required minimum match is set at 10%							State Total:	\$ 100,000
Local Funds								
								\$ -
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 212,000	\$ -	\$ -	\$ 788,000	\$ 1,000,000
Total Project Cost Estimate (all phases):							\$	1,000,000
Year of Expenditure Cost Amount:							\$	1,000,000

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

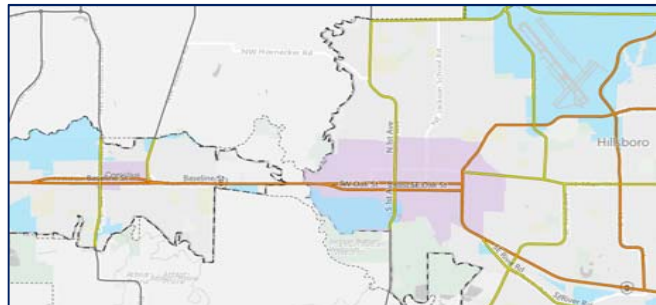
Fund Type Codes References

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	US308Y 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 Bridges	\$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 area overcrossing area safety reserve	var	var		PE	Safety	Fix-It Safety	var	var	var
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%	212,000.00		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%	788,000.00		709,200.00		78,800.00		0.00
Grand Totals					1,000,000.00		900,000.00		100,000.00		0.00



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. 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
Project Status: 0 = No activity.		Performance Meas:	Safety	Comp Date:	12/31/2027
		Capacity Enhancing:	No	RTP ID:	12095
Short 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.		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	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
		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 #: 21-24-2144			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
Federal Funds								
AC-STBGS	ACPO	2023					\$ 900,000	\$ 900,000
							\$	-
							\$	-
Note: Federal share is set at 90%							Federal Totals:	\$ 900,000
State Funds								
State	Match	2023					\$ 100,000	\$ 100,000
							\$	-
							\$	-
Note: Required minimum match is set at 10%							State Total:	\$ 100,000
Local Funds								
							\$	-
							\$	-
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000
							Total Project Cost Estimate (all phases):	\$ 1,000,000
							Year of Expenditure Cost Amount:	\$ 1,000,000

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? 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.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, and OTC staff item.
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 submitted 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 HB2017 Safety
2C	Was the Proof-of Funding requirement satisfied and how? July 2022 OTC item with project funding and approval request. Copy of staff item and allocation table provided
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 40 CFR 93.126, 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 support? 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 appear to be subject to Performance Measurements analysis and what type? Yes, safety
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.

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? Specific awarded projects will be.
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? N/A
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 #
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	ODOT Key:	22645
Project Name: Broadway Bridge Deck Replacement	3	Fiscal Constraint Cat:	Capital	MTIP ID:	NEW-TBD
		ODOT Type	Bridge	Status:	4
Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).		Performance Meas:	Bridge	Comp Date:	12/31/2024
		Capacity Enhancing:	No	RTP ID:	11902
		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
Short 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)		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
Federal Funds								
State STBG - IIJA	Y233	2023					\$ 16,909,486	\$ 16,909,486
								\$ -
Note: IIJA = Infrastructure Investment and Jobs Act							Federal Totals:	\$ 16,909,486
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Other	OTH0	2021		\$ 2,007,000				\$ 2,007,000
Local	Match	2023					\$ 1,935,366	\$ 1,935,366
								\$ -
Note: PE phase completed by the agency with local funds							Local Total	\$ 3,942,366
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 2,007,000	\$ -	\$ -	\$ 18,844,852	\$ 20,851,852
							Total Project Cost Estimate (all phases):	\$ 20,851,852
							Year of Expenditure Cost Amount:	\$ 20,851,852

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	Federal Aid ID
Total Funds Obligated:		\$ 2,007,000				
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

Fund Type Codes References	
State STBGS - IJJA	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.

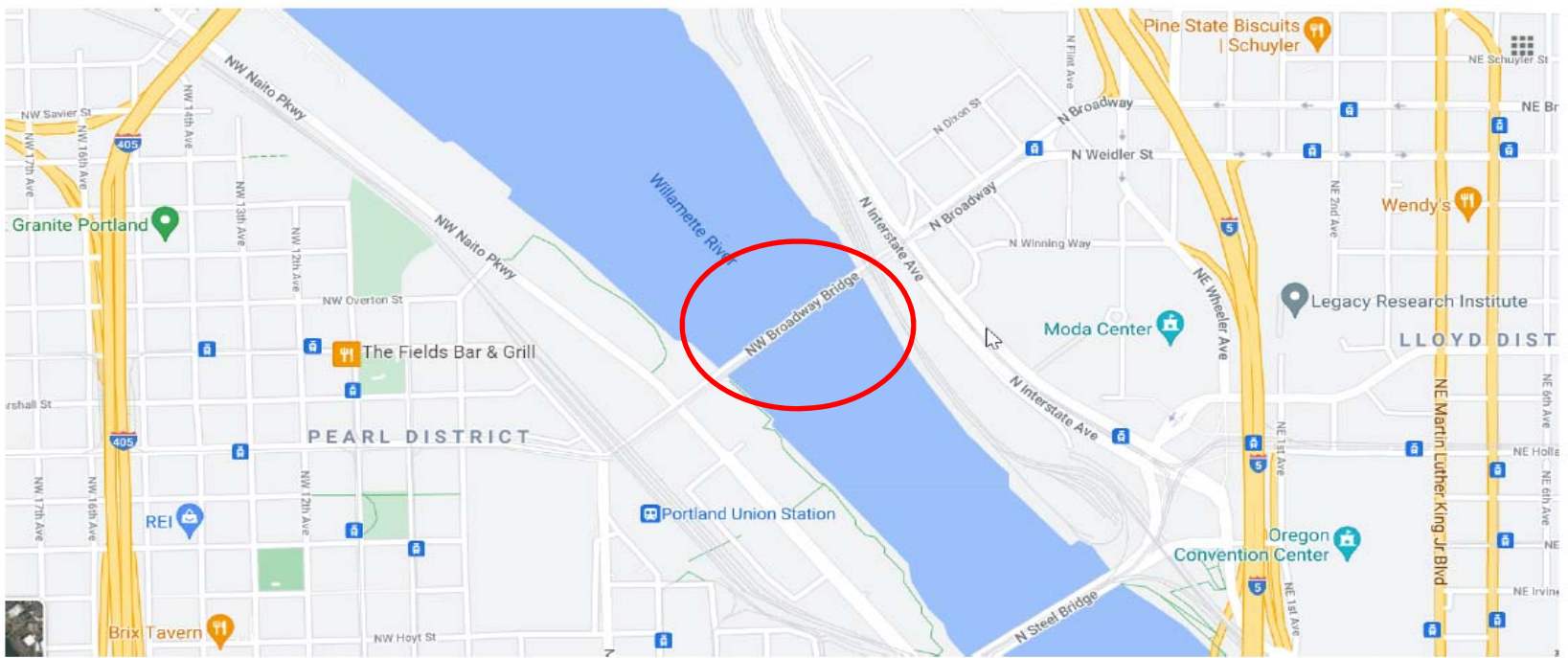
The LABSC voted 9-0 to fully fund the first 3 big bridges on the list (Marion County, City of Eugene, Multnomah County Broadway Bridge), and to have the City of Klamath Falls Bridge included in the scoping effort this summer, with a \$5M placeholder for funding.

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

\$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 -->



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
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2024
		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:	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
Federal Funds								
5307	FF92	2023	-				\$ 298,758	\$ -
5307	FF92	2023					\$ 428,120	\$ 428,120
								\$ -
							Federal Totals:	\$ 428,120
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 74,690	\$ -
Local	Match	2023					\$ 107,030	\$ 107,030
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 107,030
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 373,448	\$ 373,448
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
bing canceled

Lead Agency: SMART		Project Type:	Transit	ODOT Key:	22190
Project Name: SMART Senior and Disabled Program (2022)	5	Fiscal Constraint Cat:	Capital	MTIP ID:	71134
		ODOT Type	Transit	Status:	N/A
Project Status: Canceled		Performance Meas:	Transit	Comp Date:	N/A
		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
		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: Services and Facility Improvements for Elderly and Disabled Customers		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

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
Federal Funds								
5310	F160	2023	-				\$ 41,000	\$ -
								\$ -
								\$ -
							Federal Totals:	\$ -
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 10,250	\$ -
								\$ -
								\$ -
							Local Total	\$ -
Other funds = local overmatch contribution								
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 51,250	\$ 51,250
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	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -

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

Lead Agency: SMART		Project Type:	Transit	ODOT Key:	22191
Project Name: SMART Bus and Bus Facilities (Capital) 2022	6	Fiscal Constraint Cat:	Capital	MTIP ID:	71139
		ODOT Type	TR-CAP	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		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
Short 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		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 ---> 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
Federal Funds								
5339	FF30	2023	-				\$ 80,000	\$ -
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							Federal Totals:	\$ 48,763
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 10,250	\$ -
Local	Match	2024					\$ 12,190	\$ 12,190
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 12,190
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 90,250	\$ 90,250
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 60,953	\$ 60,953
							Total Project Cost Estimate (all phases):	\$ 60,953
							Year of Expenditure Cost Amount:	\$ 60,953

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	\$ 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

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
Total	\$ 59,707,955	\$ 38,199,581	\$ 188,647	\$ 3,716,551	\$ 2,506,810	\$104,319,544

* 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
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		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:	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
Federal Funds								
5307	FF91	2023	-				\$ 298,758	\$ -
5307	FF91	2023					\$ 576,323	\$ 576,323
								\$ -
							Federal Totals:	\$ 576,323
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 74,690	\$ -
Local	Match	2023					\$ 144,080	\$ 144,080
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 144,080
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 373,448	\$ 373,448
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 720,403	\$ 720,403
Total Project Cost Estimate (all phases):							\$	720,403
Year of Expenditure Cost Amount:							\$	720,403

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	\$ 298,758	\$ 428,120	\$107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 298,758	\$ 576,323	\$144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and	2023	5307	\$ 298,758	\$ 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
Total	\$ 59,707,955	\$ 38,199,581	\$ 188,647	\$ 3,716,551	\$ 2,506,810	\$104,319,544

* 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
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		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
		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: Existing: Services and Facility Improvements for Elderly and Disabled Customers 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.		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
Federal Funds								
5310	F160	2023	-				\$ 41,000	\$ -
5310	F160	2023					\$ 26,000	\$ 26,000
								\$ -
							Federal Totals:	\$ 26,000
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 10,250	\$ -
Local	Match	2023					\$ 6,500	\$ 6,500
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 6,500
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 51,250	\$ 51,250
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 32,500	\$ 32,500
							Total Project Cost Estimate (all phases):	\$ 32,500
							Year of Expenditure Cost Amount:	\$ 32,500

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	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	\$ 41,000	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	\$ 41,000	\$ 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

Lead Agency: SMART		Project Type:	Transit	ODOT Key:	22194
Project Name: SMART Bus and Bus Facilities (Capital) 2023	9	Fiscal Constraint Cat:	Capital	MTIP ID:	71140
		ODOT Type	TR-CAP	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		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
Short 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		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 ---> 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
Federal Funds								
5339	FF30	2023	-				\$ 80,000	\$ -
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							Federal Totals:	\$ 50,000
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 10,250	\$ -
Local	Match	2024					\$ 12,190	\$ 12,190
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 12,190
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 90,250	\$ 90,250
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 62,190	\$ 62,190
							Total Project Cost Estimate (all phases):	\$ 62,190
							Year of Expenditure Cost Amount:	\$ 62,190

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	\$ 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	

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:	22195
Project Name: SMART Bus Purchase/PM/ Amenities and Technology 2023	10	Fiscal Constraint Cat:	Capital	MTIP ID:	71145
		ODOT Type	Transit	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		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:	1
		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: 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
Federal Funds								
5307	FF91	2023	-				\$ 298,758	\$ -
5307	FF91	2023					\$ 550,000	\$ 550,000
								\$ -
							Federal Totals:	\$ 550,000
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 74,690	\$ -
Local	Match	2023					\$ 137,500	\$ 137,500
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 137,500
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 373,448	\$ 373,448
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 687,500	\$ 687,500
							Total Project Cost Estimate (all phases):	\$ 687,500
							Year of Expenditure Cost Amount:	\$ 687,500

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	\$ 298,758	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 298,758	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	\$ 298,758	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	\$ 298,758	\$ 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
		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
Short Description: Existing: Services and Facility Improvements for Elderly and Disabled Customers 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.		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
Federal Funds								
5310	F160	2024	-				\$ 41,000	\$ -
5310	F160	2024					\$ 26,000	\$ 26,000
								\$ -
							Federal Totals:	\$ 26,000
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2024	-				\$ 10,250	\$ -
Local	Match	2024					\$ 6,500	\$ 6,500
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 6,500
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 51,250	\$ 51,250
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 32,500	\$ 32,500
Total Project Cost Estimate (all phases):							\$	32,500
Year of Expenditure Cost Amount:							\$	32,500

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	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	\$ 41,000	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	\$ 41,000	\$ 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
Federal Funds								
5307	FF91	2024	-				\$ 298,758	\$ -
5307	FF91	2024					\$ 550,000	\$ 550,000
								\$ -
							Federal Totals:	\$ 550,000
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2024	-				\$ 74,690	\$ -
Local	Match	2024					\$ 137,500	\$ 137,500
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 137,500
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 373,448	\$ 373,448
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 687,500	\$ 687,500
							Total Project Cost Estimate (all phases):	\$ 687,500
							Year of Expenditure Cost Amount:	\$ 687,500

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	\$ 298,758	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 298,758	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	\$ 298,758	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	\$ 298,758	\$ 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

Lead Agency: TriMet		Project Type:	Transit	ODOT Key:	22164
Project Name: Transit Oriented Development (TOD) program (FFY 2023) Preventive Maintenance Support (FFY 2023)	13	Fiscal Constraint Cat:	Capital	MTIP ID:	71103
		ODOT Type	Transit	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2024
		Capacity Enhancing:	No	RTP ID:	11335
		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	Metro	TSMO Cycle	N/A
		Funding Type:	STBG	RFFA ID:	50392
		State Highway Route	N/A	RFFA Cycle:	2022-24
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
Short 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		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	YES	Council Appr:	Yes
		FTA Conversion Code:	5307	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 ---> 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
Federal Funds								
STBG-U	Y230	2025	-				\$ 3,600,373	\$ -
STBG-U	Y230	2023					\$ 3,600,373	\$ 3,600,373
								\$ -
Note: Annual RFFA Step 1 Metro-TriMet TOD fund swap							Federal Totals:	\$ 3,600,373
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2025	-				\$ 412,079	\$ -
Local	Match	2023					\$ 412,079	\$ 412,079
								\$ -
Other funds = local overmatch contribution							Local Total	\$ 412,079
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	This amendment to the MTIP completes what action: 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.
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 5337 funds per updated
UZA apportionment

Lead Agency: TriMet		Project Type:	Transit	ODOT Key:	22181
Project Name: TriMet Bus and Rail Preventive Maintenance (2023)	14	Fiscal Constraint Cat:	Maint	MTIP ID:	71210
		ODOT Type	TR-Cap	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		Capacity Enhancing:	No	RTP ID:	11335
		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:	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
Short Description: Capital Maintenance For Bus And Rail to ensure continued service		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: 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
Federal Funds								
5337	FF91	2023	-				\$ 26,356,662	\$ -
5337	FF91	2023					\$ 39,370,471	\$ 39,370,471
								\$ -
Note: 5337 is set at 80% federal percent							Federal Totals:	\$ 39,370,471
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 6,589,166	\$ -
Local	Match	2023					\$ 9,842,618	\$ 9,842,618
								\$ -
							Local Total	\$ 9,842,618
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 32,945,828	\$ 32,945,828
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 49,213,089	\$ 49,213,089
Total Project Cost Estimate (all phases):							\$	49,213,089
Year of Expenditure Cost Amount:							\$	49,213,089

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	\$ 26,356,662	\$ 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

Lead Agency: TriMet		Project Type:	Transit	ODOT Key:	22184
Project Name: Enhanced Seniors Mobility/Individuals w/Disabilities (2023) 5310	15	Fiscal Constraint Cat:	Other	MTIP ID:	71213
		ODOT Type	Transit	Status:	T22
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Performance Meas:	Transit	Comp Date:	12/31/2025
		Capacity Enhancing:	No	RTP ID:	11334
Short 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		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
		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:	2023	OTC Approval:	No		
Years Active:	0	OTC Date	N/A		
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

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
Federal Funds								
5310	F160	2023	-				\$ 1,405,437	\$ -
5310	F160	2023					\$ 2,020,560	\$ 2,020,560
								\$ -
Note: 5310 is set at 80% federal percent							Federal Totals:	\$ 2,020,560
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 351,359	\$ -
Local	Match	2023					\$ 505,140	\$ 505,140
Other	OTH0	2023					\$ 217,232	\$ 217,232
Note: Local = minimum 20% match amount required to show against the federal 5310							Local Total	\$ 722,372
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ 1,756,796	\$ 1,756,796
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 2,742,932	\$ 2,742,932
							Total Project Cost Estimate (all phases):	\$ 2,742,932
							Year of Expenditure Cost Amount:	\$ 2,742,932

Programming Summary Details

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

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 986,136	\$ 986,136
Phase Change Percent:	0%	0%	0%	0%	56.1%	56.1%
Revised Match Federal:					\$ 722,372	\$ 722,372
Revised Match Percent:					26.3%	26.3%

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	\$ 1,343,821	\$ 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	\$ 1,405,437	\$ 2,020,560	\$ 505,140	\$ 151,463	\$ 2,677,163

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: September 2, 2022
To: JPACT and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: September FFY 2023 MTIP Formal Amendment & Resolution 21-5283 Approval Request

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?

TPAC recommends JPACT approve Resolution 22-5283 consisting of additions or changes to fifteen total projects 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 # 22609 MTIP ID TBD New Project	ODOT	OR8: East Lane (Cornelius) (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.	<u>ADD NEW PROJECT:</u> The Formal Amendment adds the OTC approved safety project to the MTIP
(#2) ODOT Key # 22613 MTIP ID TBD New Project	ODOT	Portland Metro and Surrounding Areas Safety Reserve	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.	<u>ADD NEW PROJECT:</u> The Formal Amendment adds the OTC approved safety project to the MTIP
(#3) ODOT Key # 22645 MTIP ID TBD New Project	Multnomah County	Broadway Bridge Deck Replacement	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)	<u>ADD NEW PROJECT:</u> The Formal Amendment adds the new project with ODOT Bridge program awarded funding.
(#4) ODOT Key # 20874 MTIP ID: 70904	SMART	SMART Bus Purchase/PM/Amenities and Technology 2021	Maintenance and Bus Fleet Replacement and Software	<u>ADD FUNDS:</u> The amendment increases the authorized 5307 funding for the project.

<p>(#5) ODOT Key # 22190 MTIP ID: 71134</p>	<p>SMART</p>	<p>SMART Senior and Disabled Program (2022)</p>	<p>Services and Facility Improvements for Elderly and Disabled Customers</p>	<p><u>CANCEL PROJECT:</u> Key 22190 is canceled as SMART has traded funds with TriMet. Key 22190 is no longer a project.</p>
<p>(#6) ODOT Key # 22191 MTIP ID: 71139</p>	<p>SMART</p>	<p>SMART Bus and Bus Facilities (Capital) 2022</p>	<p>Bus and Bus Facility Upgrades 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</p>	<p><u>FUNDING AND DESCRIPTION:</u> Decrease authorize FTA section 5339 funds and expand description per FTA guidance</p>
<p>(#7) ODOT Key # 22192 MTIP ID: 71144</p>	<p>SMART</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2022</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2022</p>	<p><u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project per the updated UZA Apportionment letter</p>
<p>(#8) ODOT Key # 22193 MTIP ID: 71135</p>	<p>SMART</p>	<p>SMART Senior and Disabled Program (2023)</p>	<p>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.</p>	<p><u>DECREASE FUNDING:</u> 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>(#9) ODOT Key # 22194 MTIP ID: 71140</p>	<p>SMART</p>	<p>SMART Bus and Bus Facilities (Capital) 2023</p>	<p>Bus and Bus Facility Upgrades 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</p>	<p><u>SLIP & FUNDING:</u> Decrease projected authorized 5339 funds and slip project to FFY 2024</p>
<p>(#10) ODOT Key # 22195 MTIP ID: 71145</p>	<p>SMART</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2023</p>	<p>Maintenance and Bus Fleet Replacement and Software</p>	<p><u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project</p>
<p>(#11) ODOT Key # 22196 MTIP ID: 71136</p>	<p>SMART</p>	<p>SMART Senior and Disabled Program (2024)</p>	<p>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.</p>	<p><u>DECREASE FUNDING:</u> 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>(#12) ODOT Key # 22198 MTIP ID: 71146</p>	<p>SMART</p>	<p>SMART Bus Purchase/PM/ Amenities and Technology 2024</p>	<p>Maintenance and Bus Fleet Replacement and Software</p>	<p><u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project</p>
<p>(#13) ODOT Key # 22164 MTIP ID: 71103</p>	<p>TriMet</p>	<p>Transit Oriented Development (TOD) program (FFY 2023) Preventive Maintenance Support (FFY 2023)</p>	<p>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</p>	<p><u>SCOPE ADJUSTMENT & ADVANCE:</u> 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>

			needs for labor and materials/services used for on-going maintenance of Bus and Rail fleets in TriMet's 3 county service district	
(#14) ODOT Key # 22181 MTIP ID: 71210	TriMet	TriMet Bus and Rail Preventive Maintenance (2023)	Capital Maintenance For Bus And Rail to ensure continued service	ADD FUNDING: Increase authorized 5337 funds based on revised FFY 2023 FTA UZA estimates
(#15) ODOT Key # 22184 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	ADD FUNDING: 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.

TPAC September 2, 2022 Meeting Summary:

TPAC members received their MTIP Formal Amendment notification and summary on September 2, 2022. Ken Lobeck, Metro Staff, discussed the need for the amendment and why Metro was starting early for FFY 2023. He also provide a short summary of the changes occurring to the fifteen projects in the amendment bundle.

Chris Deffebach, Washington County asked for clarification about the urbanized zone (UZA) and if this meant Metro now was handling amendment needs for C-Tran. Ken explained that inclusion of the UZA map was informational to help show that FTA formula funds are appropriated in a different fashion from FHWA based funds. He continued that the MTIP amendment responsibilities only include TriMet and SMART.

Tara O'brien, TriMet, asked about future opportunities for TriMet to submit required project amendments and how often would this occur. Ken stated that Metro completes a formal MTIP amendment on a monthly basis and administrative modifications on an ongoing basis as needed. He also stated as part of the Annual Obligation Targets development process (to begin in October 2022 for FFY 2023), Metro will include all FFY 2023 transit projects for TriMet and SMART to review and update if needed to help ensure their FTA Transit Awards Management System (TrAMS) grants move efficiently through FTA's approval process.

With no further questions, TPAC provided a unanimous approval recommendation to JPACT to approve Resolution 22-5283 consisting of additions and changes to fifteen projects to the MTIP which will enable federal reviews and fund obligations to then occur in early Fall of 2022.

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

Project #1	OR8: East Lane (Cornelius) - New project
<p><u>Project Description:</u> 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"> • Lead Agency: ODOT • ODOT Key Number: 22609 • 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 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).

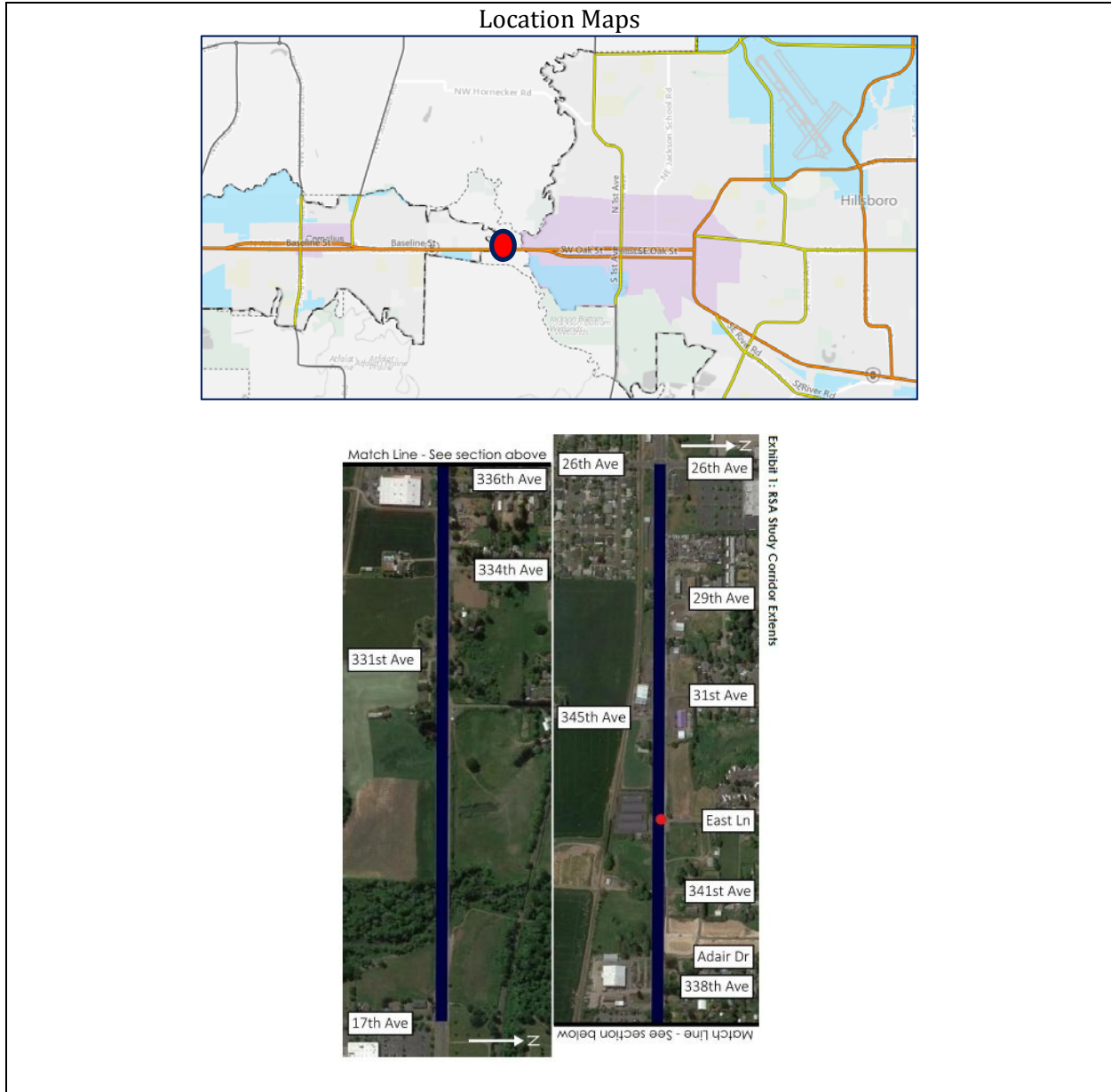
Based on the review, the new project was added to the ODOT Annual Amendment. See Attachment 1 (OTC Item) that provides additional details for the ODOT Annual Amendment.

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	
22615	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	07524B, 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	Fish Passage	Fix-it SW Fish Pass	\$7,300,000.00	\$3,400,000.00
PE & CN	Modernization	Enhance Region 2 Fix-it SW Bridge	\$35,960,436.00	\$50,460,436.00



Project #2 Portland Metro and Surrounding Areas Safety Reserve (New Project)

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.

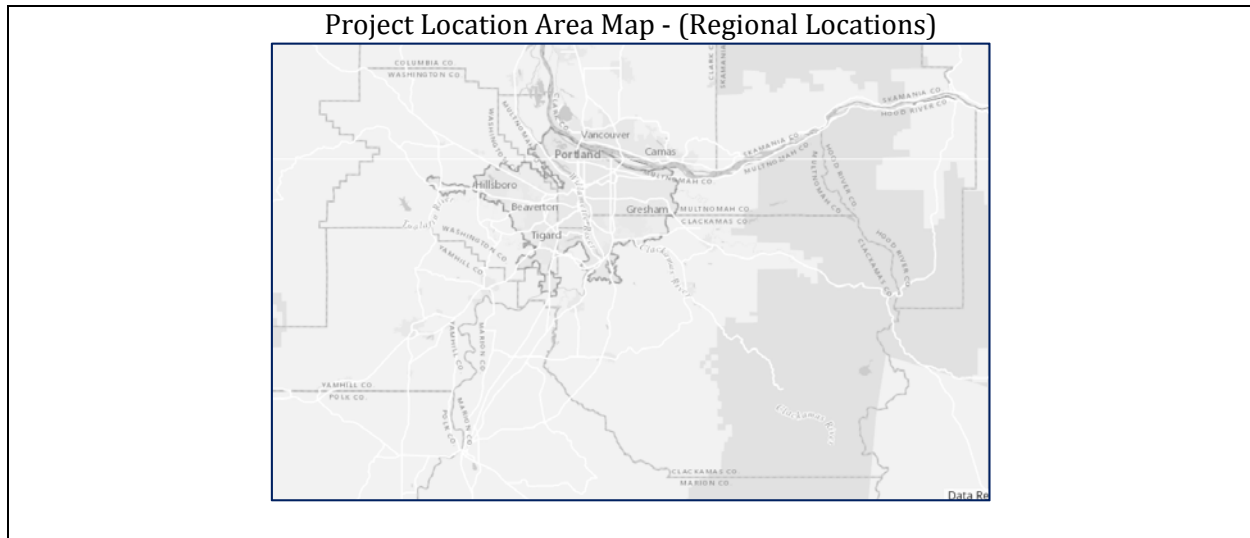
As projects are approved, the funding will be split off from the safety reserve and programmed in the MTIP and STIP as individual projects. OTC has allocated \$1 million total from the HB2017 Safety category to support the Region 1 Safety Reserve. OTC approved the Region 1 Safety Reserve on July 22,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

Support Item(s):

ODOT Annual Amendment Funding Table

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



Project #3 | Broadway Bridge Deck Replacement

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.

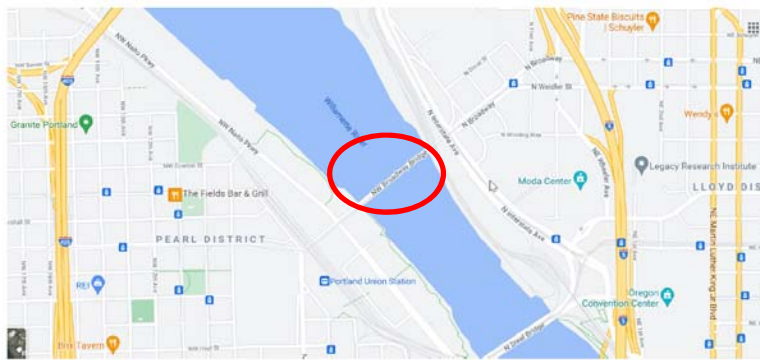
The LABSC voted 9-0 to fully fund the first 3 big bridges on the list (Marion County, City of Eugene, Multnomah County Broadway Bridge), and to have the City of Klamath Falls Bridge included in the scoping effort this summer, with a \$5M placeholder for funding.

Large Rehab		\$31,024,910 Allocated										102.0% Allocation		(\$625,090) Remaining	
Bridge	Agency	Type	On-Off	Region	SRF	TBF	LDF	UBF	sf (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



Project #4	SMART Bus Purchase/PM/Amenities and Technology 2021
Project Description: Maintenance and Bus Fleet Replacement and Software	
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • Lead Agency: SMART • ODOT Key Number: 20874 • MTIP ID#: 70904 • 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 is 43% 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:

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

**Project #5 SMART Senior and Disabled Program (2022)
(Canceled Project)**

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
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -

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
Total	\$ 59,707,955	\$ 38,199,581	\$ 188,647	\$ 3,716,551	\$ 2,506,810	\$104,319,544

* 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
Total	\$ 59,707,955	\$ 38,199,581	\$ 188,647	\$ 3,716,551	\$ 2,506,810	\$104,319,544

* 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
FTA 5310 Funds									
20866	SMART	SMART Senior and Disabled Program (2019)	2022	5310	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	\$ 41,000	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	\$ 41,000	\$ 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								
<p>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</p>									
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • 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 									
<p>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</p>									
<p>Support Items:</p> <p style="text-align: center;">FTA Apportionment and EOY Funding Update Split</p>									
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 #10 SMART 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	\$ 298,758	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 298,758	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	\$ 298,758	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	\$ 298,758	\$ 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	\$ 41,000	\$ 17,628	\$ 4,407	\$ -	\$ 22,035
20867	SMART	SMART Senior and Disabled Program (2020)	2022	5310	\$ 41,000	\$ 18,284	\$ 4,571	\$ -	\$ 22,855
20868	SMART	SMART Senior and Disabled Program (2021)	2022	5310	\$ 41,000	\$ 18,552	\$ 4,638	\$ -	\$ 23,190
22190	SMART	SMART Senior and Disabled Program (2022)	2022	5310	\$ 41,000	\$ -	\$ -	\$ -	\$ -
22193	SMART	SMART Senior and Disabled Program (2023)	2023	5310	\$ 41,000	\$ 26,000	\$ 6,500	\$ -	\$ 32,500
22196	SMART	SMART Senior and Disabled Program (2024)	2024	5310	\$ 41,000	\$ 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								
<u>Project Description:</u> Maintenance and Bus Fleet Replacement and Software									
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • 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 									
<u>Description of Changes</u>									
<p>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.</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>									
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	\$ 298,758	\$ 428,120	\$ 107,030	\$ -	\$ 535,150
22192	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	2023	5307	\$ 298,758	\$ 576,323	\$ 144,080	\$ -	\$ 720,403
22195	SMART	SMART Bus Purchase/PM/Amenities and Technology 2023	2023	5307	\$ 298,758	\$ 550,000	\$ 137,500	\$ -	\$ 687,500
22198	SMART	SMART Bus Purchase/PM/Amenities and Technology 2024	2024	5307	\$ 298,758	\$ 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	\$2,838,898
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)						
<p><u>Project Description:</u> Capital Maintenance For Bus And Rail to ensure continued service</p>							
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • 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 							
<p><u>Description of Changes</u></p> <p>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.</p> <p>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.</p>							
<p>Support Items:</p>							
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	-\$ 26,356,662	\$ 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	\$ -1,242,824	\$ 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	\$ -1,405,487	\$ 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
• TPAC notification and approval recommendation.....	September 2, 2022
• 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:

TPAC recommends JPACT approve Resolution 22-5283 consisting of additions or changes to fifteen total projects 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

Kristopher W. Strickler

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	\$26,235,466.00	\$26,235,466.00	\$0.00	Increase the Construction phase, adding funds for ADA and preservation scope.
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	Add CN phase for 2024.
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	Increase PE & RW
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 Fish Passage	\$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.
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 Modernization	\$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.
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 Preservation	\$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.
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert Fish Passage	\$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.
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition ADA	\$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.
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition ADA	\$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.
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed Bike/Ped	\$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.
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		Modernization JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2 Preservation	\$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.
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2 Operations	\$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.
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety OP-ITS	\$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
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS Modernization	\$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.
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3 Preservation	\$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
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge Preservation	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
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.
21677	3	OR42: Lookingglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge Preservation	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Add IIIA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3 Operations	\$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
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3 Operations	\$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
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3 Safety	\$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

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	SW Pedbike Strategic AT Leverage	\$1,974,966.00	\$1,974,966.00	\$0.00	Attachment: OTC July 14, 2022 Annual Amendment Staff Item Program for Pedbike Strategic program, adding AT Leverage to make CN phase whole
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.

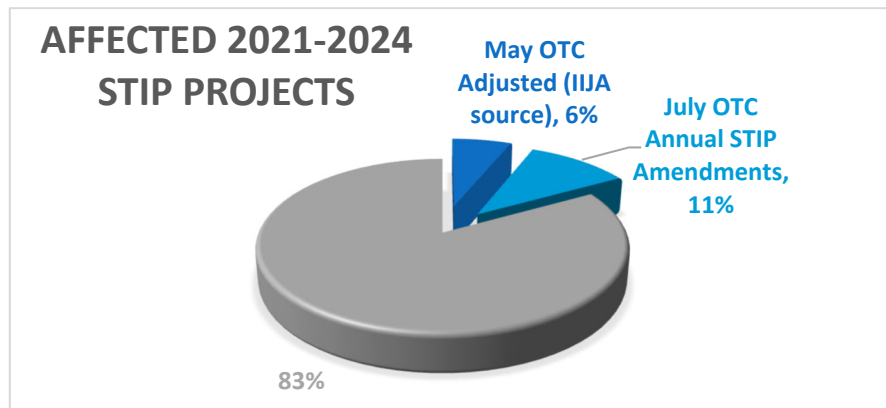
Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22445	5	Burns & Hines curb ramps	0 128.00	0.50 132.2		PE & RW		SW ADA Transition	\$5,222,246.00	\$7,261,783.00	\$2,039,537.00	Increased the Preliminary 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	Bike/Ped	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	Bike/Ped	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 IJA flexible funds allocated to the Safe Routes to School program (\$1M).
21820	6	Workforce Development SFY24				OT	Special Programs	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	Bike/Ped	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	Bike/Ped	SW SRTS	\$0.00	\$750,000.00	\$750,000.00	Add a new project, using IJA flexible funds allocated to the Safe Routes to School program.
	6	Safe Routes to School Quick Build Signs and Lines				PL & OT	Bike/Ped	SW SRTS	\$0.00	\$100,000.00	\$100,000.00	Add a new project, using IJA 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	Fish Passage	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

Kristopher W. Strickler

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	\$26,235,466.00	\$3,235,466.00	\$23,000,000.00	In-Place the Construction of funds adding funds for ADA and preservation scope.
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	Add CN phase for 2024.
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	Increase PE & RW
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 Fish Passage	\$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.
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 Modernization	\$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.
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 Preservation	\$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.
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert Fish Passage	\$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.
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition ADA	\$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.
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition ADA	\$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.
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed Bike/Ped	\$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.
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		Modernization JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2 Preservation	\$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.
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2 Operations	\$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.
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety OP-ITS	\$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
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS Modernization	\$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.
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3 Preservation	\$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
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge Preservation	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
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.
21677	3	OR42: Lookingglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge Preservation	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Add IIIA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3 Operations	\$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
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3 Operations	\$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
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3 Safety	\$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

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	SW Pedbike Strategic AT Leverage	\$1,974,966.00	\$1,974,966.00	\$0.00	Attachment: OTC July 14, 2022 Annual Amendment Staff Item Program for Pedbike Strategic program, adding AT Leverage to make CN phase whole
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 IJA 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 IJA 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 IJA 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).

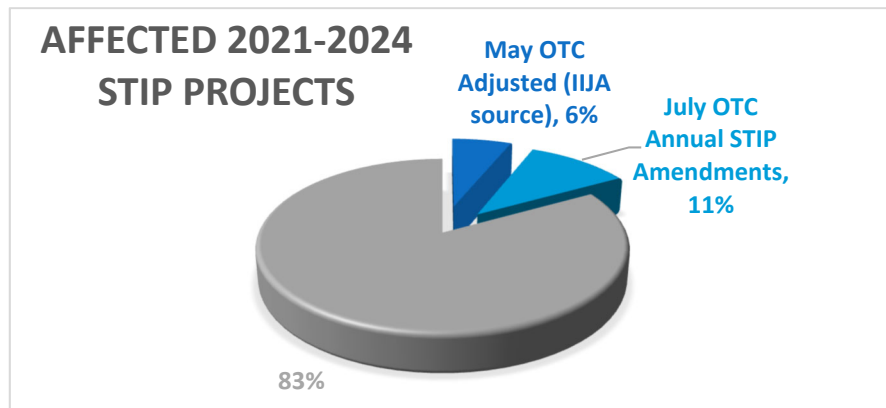
\$269,890,414.00 \$423,005,139.76 \$153,114,725.76

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.

4.2 Consideration of the August 18, 2022 JPACT Minutes

Consent Agenda

Joint Policy Advisory Committee on Transportation
Thursday, September 15, 2022



JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT)

Meeting Minutes

August 18, 2022

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Shirley Craddick (Chair)
Juan Carlos González
Christine Lewis
Temple Lentz
Travis Stovall
Anne McEnerny-Ogle
Steve Callaway
Paul Savas
Kathy Hyzy
Nafisa Fai
Jessica Vega Pederson
Carley Francis
Rian Windsheimer

AFFILIATION

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

MEMBERS EXCUSED

Nina DeConcini
Curtis Robinhold
Sam Desue
Jo Ann Hardesty

AFFILIATION

Oregon Department of Environmental Quality
Port of Portland
TriMet
City of Portland

ALTERNATES PRESENT

Chris Ford
JC Vannatta
Jef Dalin
Ty Stober
Chris Warner
Emerald Bogue

AFFILIATION

Oregon Department of Transportation
TriMet
City of Cornelius
City of Vancouver
City of Portland
Port of Portland

OTHERS PRESENT: Allison Boyd, Ben Bedard, Brenda Bartlett, Carrie Leonard, Chris Deffebach, Chris Fick, Chris Smith, Cindy Dauer, Cody Field, Dave Roth, Don Odermott, Dwight Brashear, Eric Hesse, Erica Rooney, Erin Doyl, Garet Prior, Glen Bolen, Gwenn Baldwin, Jamie Lorenzini, Jamie Snook, Jamie Stasny, Jean Senchal Biggs, Jeff Gudman, Joe Buck, Karen Buehrig, Katherine Kelly, Laurie Lebowsky-Young, Mark Lear, Mark Ottenad, Matthew Flodin, Matthew Hall, Mike Bezner, Monica Tellez-Fowler, Neelan Dorman, Nubia, Sarah Paulus, Scott, Shoshana Cohen, Steph Noll, Stephen Roberts, Tara O'Brien, Terry Kearns, Tom Markgraf, Wendy Lawton, Will Farley.

STAFF: Alex Oreschak, Ally Holmqvist, Anneliese Koehler, Caleb Winter, Dan Kaempff, Grace Cho, Harrison Husting, Jaye Cromwell, John Mermin, Kim Ellis, Lake McTighe, Lisa Hunrichs, Malu Wilkinson, Marielle Bossio, Michelle Bellia, Monica Krueger, Ramona Perrault, Ted Leybold, Tom Kloster, Tyler Frisbee, Victor Sin, Connor Ayers, Carrie MacLaren, Margi Bradway, Stellan Roberts.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

JPACT Chair Shirley Craddick (she/her) called the virtual Zoom meeting to order at 7:30 am.

Chair Craddick called the role and declared a quorum.

2. PUBLIC COMMUNICATION ON AGENDA ITEMS

Councilor Wendy Lawton from the Fairview City Council provided testimony on the Regional Flexible Funds Allocation (RFFA) and encouraged members of JPACT to support the \$6.5 million in funding for the NE Sandy Boulevard Complete Street Project. Councilor Lawton explained the need for this funding as the corridor is currently unsafe with few sidewalks and bike lanes.

Mayor Joe Buck (he/him) from Lake Oswego provided testimony on RFFA and spoke on the importance of the Lakeview Boulevard Project as it would help improve safety and access in an underserved area as it would make important pedestrian improvements.

Steph Noll (she/her) with the Oregon Trails Coalition provided testimony on Regional Flex Funds specifically sharing considerations on trails projects. Steph shared the importance of investment of off street trails and Regional Flex Funds are a critical funding source for trails outside the road right of way.

3. UPDATES FROM THE CHAIR

Chair Craddick thanked those who attended the second JPACT/Council Regional Transportation Plan (RTP) Workshop and highlighted that staff is working on summary reports for the first two workshops. Chair Craddick announced that the next workshop will take place on September 29 at 7:30 a.m. and that JPACT member Nina DeConcini has announced her retirement from the Oregon Department of Environmental Quality.

Metro Staff Margi Bradway (she/her) shared the names and ages of traffic victims during the month of July:

Erik Eugene Ash, 46, Procoro Hidalgo-Lozaro, 84, Kody Hansen, 24, Dale Herrin, 45, Daniel Slattery, 23, and seven unidentified people.

4. CONSENT AGENDA

MOTION: JC Vannatta (he/him) moved to approve the consent agenda seconded by Mayor Travis Stovall (he/him).

ACTION: With all in favor, consent agenda passed.

5. INFORMATION/DISCUSSION ITEMS

5.1 Development of 2025-2027 Regional Flexible Funds/Trails Bond Funding Recommendations

Commissioner Savas discussed the importance of having the vision statement from the first RTP workshop as it will guide decisions made moving forward.

Margi agreed with Commissioner Savas and explained that staff is working on bringing this work to JPACT by the September meeting.

Chair Craddick introduced Metro staff Dan Kaempff (he/him) and Robert Spurlock (he/him) to present to JPACT.

Key elements of the presentation included:

Dan highlighted the purpose of today's discussion, the process for selecting projects, updated information, sub-region priorities for both the Parks Bond and RFFA, and reminded JPACT about the July TPAC and JPACT meetings. Dan discussed funding recommendation examples, the baseline example, example 1: baseline with adjustments, example 2: baseline with top 2 priorities and example 3: other considerations.

Robert discussed bond considerations.

Dan summarized the August 5th TPAC discussion and asked for input from JPACT members.

Member discussion included:

Chris Warner (he/him) stressed the need to remain focused on an outcomes based approach to delegating funding and on the projects that address the region's equity and safety needs.

Commissioner Jessica Vega Pederson (she/her) stressed the importance of the Sandy project and of getting urban arterials to a baseline level of safety.

Mayor Steve Callaway (he/him) expressed support of option three. He explained that Washington County did not bring projects forward that they knew would score low on some of

the criteria. Mayor Callaway voiced that support for option three reflects support for bikes and pedestrians over cars.

In the chat Mayor Travis Stovall supported the written testimony submitted by the East Multnomah County Transportation Committee and the comments made earlier in the meeting by Councilor Lawton.

Commissioner Savas highlighted that staffing issues due to COVID caused smaller cities in Clackamas County to struggle to apply for this funding. Commissioner Savas voiced that areas that have the greatest need should be more heavily considered for funding so we can strive for a regionally balanced transportation system.

Councilor Juan Carlos Gonzalez (he/him) noted that in option 3 Clackamas and Washington County funding only adds up to 30 percent of the total funding which feels imbalanced to him. Councilor Gonzalez expressed that he hopes to achieve more regionalism.

Commissioner Nafisa Fai (she/her) expressed support for option 3 and that a more equitable lens should be applied to the regional distribution of funding.

Margi stressed that federal funds cannot be sub allocated across the region.

Council President Kathy Hyzy (she/her) voiced support for option two as it could give flexibility in project funding moving forward.

Dan summarized the discussion from JPACT and explained next steps.

Robert explained next steps for parks bond funding.

5.2 Regional Transportation Plan (RTP) – High Capacity Transit Strategy Update for 2023 RTP

Chair Craddick introduced Ally Holmqvist to present to JPACT.

Key elements of the presentation included:

Ally defined high capacity transit, described the transit spectrum that's in the RTP, how High Capacity Transit (HCT) fits in with regional work, where HCT work is today, what we want to do, who Metro is partnering with, how the work is organized, community feedback, what is being considered, and what is coming up.

Member discussion included:

Rian Windsheimer mentioned the benefits of bus on shoulder for HCT projects. Rian flagged Powell Boulevard as a place where a HCT project will not work as work has already been done

to look into projects on Powell.

Commissioner Savas spoke to the importance of adding service where there is none as opposed to improving services where transit is already in place.

JC Vanetta agreed with Commissioner Savas' comments and explained that TriMet is looking into adding service where there is none.

Mayor Callaway discussed the importance of adding transit coverage where there is none and making service more reliable and efficient where it already exists.

Council President Hyzy expressed appreciation for bus on shoulder and the emphasis of a transit grid. Council President Hyzy discussed that Climate Friendly Equitable Communities Rulemaking will be shaping the terrain throughout the Metro region for years to come.

Chris Warner discussed the importance of creating a pipeline to create Federal Transit Administration (FTA) funding and thanked Metro and partners for the work that has been done.

5.3 Oregon Department of Transportation (ODOT) Highway Plan Amendment

Chair Craddick introduced Alex Oreschak (he/him), Metro, Amanda Pietz (she/her), and Gareth Prior (he/him), ODOT, to present to JPACT.

Key elements of the presentation included:

Alex thanked members of JPACT for participating in the JPACT/Metro Council workshop on July 28 and discussed next steps.

Amanda provided context and an overview on the Oregon Highway Plan (OHP) Toll Policy Amendment, explained the schedule for the amendment, discussed public comment themes, and next steps.

In the chat Gareth put the link to Oregon Highway Plan Toll Amendment webpage:
<https://www.oregon.gov/odot/Planning/Pages/Oregon-Highway-Plan-Update.aspx>

Member discussion included:

JC Vannatta stressed that they want to see state policy support transit and multimodal improvements.

Chris Warner discussed the importance of the OHP to address the difference between tolling and congestion management. Chris explained that connections between local and regional policies must be strengthened and policies must be designed with the entire region in mind.

Councilor Christine Lewis (she/her) expressed disappointment that definitions are still being struggled with. She explained that the region will not benefit from tolling if it is not a way to invest in community needs.

Councilor Gonzalez voiced that what is being proposed does not properly reflect the work that has been done by JPACT and other partners in the greater Portland region.

Council President Hyzy agreed with previous statements made by Councilors Gonzalez and Lewis and expressed disappointed some current definitions around arterials, safety, and trip-length.

Commissioner Savas explained that the goals of tolling will be difficult to achieve if implemented in Clackamas County.

Amanda explained next steps for feedback.

Councilor Lewis proposed that JPACT create a letter with recommendations before the public comment period is closed.

Margi Bradway, Metro, responded to Councilor Lewis by explaining that staff can work to draft a letter to approve at next JPACT meeting.

Rian requested that a letter be drafted as soon as possible.

Chair Craddick encouraged coordinating committees to also submit letters to the Oregon Transportation Commission on this topic due to the importance of this decision.

Margi discussed a potential timeline for the draft letter.

In the chat Amanda wrote: "Comments can be made via electronic comment form at the website Garet pasted above or by email to OHPManager@odot.oregon.gov" and stated that the OTC meeting is September 13th.

6. UPDATES FROM JPACT MEMBERS

Rian announced that the RTAC is meeting on August 24 at 9AM.

7. **ADJORN**

Chair Craddick adjourned the meeting at 9:30 am.

Respectfully Submitted,

Stellan Roberts

Stellan Roberts
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF AUGUST 18, 2022

ITEM	DOCUMENT TYPE	DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
2.0	Written Testimony	8/18/2022	Written Testimony from the East Multnomah County Transportation Committee	07212022-01
3.0	Handout	8/18/2022	RTP JPACT/Council workshop on Congestion Pricing Slides	07212022-02
3.0	Presentation	8/18/2022	Fatal Crash Slide	07212022-03
6.1	Presentation	8/18/2022	Regional Flexible Funds/Trails Bond Funding Recommendations Slides	07212022-04
6.2	Presentation	8/18/2022	High Capacity Transit Slides	07212022-05
6.3	Presentation	8/18/2022	ODOT Highway Plan Amendment Slides	07212022-06

5.1 Resolution No. 22-5284, For the Purpose of Allocating \$152.7 Million of Regional Flexible Funding for the Years 2025-2027, Pending Adoption of the 2024-2027 Metropolitan Transportation Improvement Program (MTIP)

Action Items

Joint Policy Advisory Committee on Transportation
Thursday, September 15, 2022

JPACT Worksheet

Agenda Item Title: 2025-2027 Regional Flexible Funds Step 2 Projects

Presenters: Dan Kaempff

Contact for this worksheet/presentation: Dan Kaempff; daniel.kaempff@oregonmetro.gov

Purpose/Objective

Review TPAC recommendation for projects to be funded through Step 2 of the 2025-2027 Regional Flexible Funds Allocation and take action to approve a final funding package for Metro Council action.

Outcome

JPACT will approve a list of projects and funding amounts for Council action in their consideration of Resolution 22-5284.

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

Staff last presented this item to JPACT in August 2022. In that meeting, staff presented several funding examples as a basis for a staff recommendation for discussion, and formal action at the September TPAC meeting.

In their September 2 meeting, TPAC approved a recommendation to JPACT to fund 10 capital projects as identified in the accompanying meeting materials.

What packet material do you plan to include?

Staff memo, TPAC recommended funding list, draft legislation, slide deck

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ALLOCATING \$152.7)	RESOLUTION NO. 22-5284
MILLION OF REGIONAL FLEXIBLE FUNDING)	
FOR THE YEARS 2025-2027, PENDING)	Introduced by Chief Operating Officer
ADOPTION OF THE 2024-2027 MTIP)	Marissa Madrigal in concurrence with
)	Council President Lynn Peterson

WHEREAS, Metro is the regional government responsible for regional land use and transportation planning under state law and the federally-designated metropolitan planning organization (MPO) for the Portland metropolitan area; and

WHEREAS, approximately \$152.7 million is forecast to be appropriated to the metropolitan region through the federal Surface Transportation Block Grant Program (STBG) and Congestion Mitigation – Air Quality (CMAQ) transportation funding programs; and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per federal regulation 23 CFR 450.324 to allocate these funds to projects and programs in the metropolitan region through the Regional Flexible Fund Allocation (RFFA) process; and

WHEREAS, the Metro Council and JPACT have provided policy guidance to Metro staff to conduct a two-step allocation process to Region-wide Program Investments and Capital Project Investments for funding by Metro Resolution No. 21-5194, For the Purpose of Adopting the 2025-2027 Regional Flexible Funds Program Direction for the Portland Metropolitan Area, adopted September 9, 2021; and

WHEREAS, the criteria used to select projects for the 2025-2027 RFFA followed policy direction adopted by Metro Council in the 2018 Regional Transportation Plan by Ordinance No. 18-1421, For the Purpose of Amending the 2014 Regional Transportation Plan (RTP) to Comply with Federal and State Law and Amending the Regional Framework Plan; and

WHEREAS, the 2018 RTP investment policy directed the region to invest in transportation projects which advanced equity, improved safety, carried out the region’s Climate Smart Strategy, and provided traffic congestion relief; and

WHEREAS, an extensive regional public process provided opportunities for comments on the merit and potential impacts of the project and program applications between September 6 and October 7, 2019, and is summarized in Exhibit C, attached to this resolution; and

WHEREAS, JPACT has recommended that Capital Project Investments funded through the 2025-2027 RFFA should focus on improving Equity and Safety outcomes throughout the region; and

WHEREAS, TPAC has provided recommendations to JPACT and the Metro Council on a list of projects and programs, as shown in Exhibit A, attached to this resolution, to allocate funding in a manner consistent with RTP policy direction, the 2025-2027 RFFA Program Direction, local prioritization processes, and public comments; and

WHEREAS, JPACT approved this legislation to submit to the Metro Council for adoption; and

WHEREAS, receipt of these funds is conditioned on completion of requirements listed in Exhibit B to this resolution; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on the programs and projects to be funded through the 2025-2027 Regional Flexible Fund Allocation process as shown in Exhibit A.

ADOPTED by the Metro Council this 13th day of October, 2022.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

draft

IN CONSIDERATION OF RESOLUTION NO. 22-5284, FOR THE PURPOSE OF ALLOCATING \$152.7 MILLION OF REGIONAL FLEXIBLE FUNDING FOR THE YEARS 2025-2027, PENDING ADOPTION OF THE 2024-2027 MTIP

Date: XX

Department: Planning & Development

Meeting Date: October 13, 2022

Prepared by:

Daniel Kaempff,

daniel.kaempff@oregonmetro.gov

ISSUE STATEMENT

As the metropolitan planning organization (MPO) for the urban area of the Portland region, Metro distributes different sources of federal transportation funds. Two sources of federal transportation funds, the Surface Transportation Block Grant Program (STBG) and the Congestion Mitigation and Air Quality (CMAQ), are allocated at the discretion of the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council. The process of distributing these funds is known as the Regional Flexible Funds Allocation (RFFA). The RFFA is conducted on a three-year funding cycle. The metropolitan region is forecasted to receive \$152.7 million from these sources in the federal fiscal years of 2025-2027.

ACTION REQUESTED

Approve Resolution No. 22-5284, allocating funding to regional investments as recommended by the Joint Policy Advisory Committee on Transportation (JPACT), and detailed in Attachment A.

IDENTIFIED POLICY OUTCOMES

In September 2021, JPACT and Metro Council adopted Resolution 21-5194 which established the program direction for the 2025-2027 RFFA. This program direction establishes the process and criteria for the funding allocation, and follows policy established in the 2018 Regional Transportation Plan (RTP), adopted by JPACT and Metro Council in December 2018 (Ordinance 18-1421). Through that effort, four key regional funding priorities emerged:

- Equity, with a focus on race and income
- Safety
- Climate Smart Strategy implementation
- Managing Congestion

These four priorities were carried forward as the policy outcomes for the 2025-2027 RFFA, recognizing the extensive public outreach effort and agreement among the region's stakeholders that had led to their inclusion in the 2018 RTP.

The 2025-2027 RFFA Program Direction continues a two-step process for allocation of these regional funds. Step 1 identifies funding for repayment of bonds issued for regional transit system and other capital project development, funding for MPO planning and administration, and continued investment in regionwide programs to carry out priorities identified through the 2018 RTP.

Step 2 is funding identified for local capital projects that improve the regional transportation system. Metro conducted a Step 2 project solicitation and evaluation process beginning in July 2021 and concluding in September 2022 with a JPACT-approved list of projects to receive funding.

Metro's Planning, Development and Research staff coordinated with Parks and Nature staff to use the RFFA project solicitation process in developing a staff recommendation for projects to be funded through the portion of funding dedicated to trails projects in the voter-approved 2019 Metro Parks and Nature bond measure. This staff recommendation was adopted by Metro Council on September 29, 2022 (Resolution 22-XXXX).

Part of the Step 2 project selection process was to conduct a technical analysis on the project proposals to determine their performance with regards to the policy outcomes. This technical analysis measured the projects' potential benefits and outcomes in each of the four policy priority areas and assigned each a project a rating reflective of its merits.

Following completion of the technical analysis, discussions with Metro Council and JPACT directed that the recommended project list be developed with an emphasis on Equity and Safety outcomes.

POLICY QUESTION(S)

Should the Metro Council approve the resolution and direct staff to move forward with allocating funding to the selected projects as recommended by JPACT?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Policy options for Metro Council to consider include:

1. Approve the resolution thereby approving the funding allocations and project funding awards as outlined in Attachment A, and conditions of approval as outlined in Attachment B
2. Remand the resolution back to JPACT with direction on desired changes or conditions

STAFF RECOMMENDATIONS

Staff recommends Metro Council approval of Resolution 22-5284.

The package of projects funded through this resolution were selected by JPACT based on their technical performance in achieving outcomes in the four RFFA policy outcomes. In addition to their technical merit, the package follows RFFA policy direction regarding how these funds should be allocated to invest in projects throughout the region and to use them to leverage other investments.

Non-approval or a remand of the package of projects back to JPACT could result in a delay in adoption of the 2024-2027 Metropolitan Transportation Improvement Program (MTIP), due to be adopted by Metro Council in 2023. The MTIP is the federally approved list of transportation investments in the region and a delay in its adoption could result in the region being unable to spend federal funding until it is approved by the Federal Department of Transportation.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The 2025-2027 RFFA follows transportation policy direction established in the development of the 2018 RTP. Chapter 6 of the RTP provides detail on the region's investment priorities. Projects selected for RFFA funding are on the 2027 Constrained RTP project list, which identifies the highest priority projects to be funded in the first 10 years of the plan. The RTP project list focuses on making near-term progress on key regional priorities – equity, safety, climate, and congestion.

How does this advance Metro's racial equity goals?

Advancing equity is a primary policy objective for the RFFA. Equity, along with Safety, were the primary outcomes used in selecting projects. The projects selected were evaluated on the degree to which they eliminated transportation-related disparities and barriers, and improved access to community assets within RTP Equity Focus Areas. Equity Focus Areas are defined as communities where the rate of people of color, people in poverty and people with low English proficiency is greater than the regional average and double the density of one or more of these populations.

How does this advance Metro's climate action goals?

Another of the four primary policy objectives for the 2025-2027 RFFA is to advance the region's Climate Smart Strategy. Selected projects were evaluated based in part on how they could help the region reduce greenhouse gas emissions. The projects funded through the 2025-2027 RFFA are focused on making bicycling and walking easier and safer, and improving and expanding the region's transit system.

Known Opposition/Support/Community Feedback

A 30-day public comment period was held between May 20 and June 21, 2022. Over 3,000 individuals shared their thoughts and opinions on the 29 projects under consideration for funding. All the projects received over 50 percent of their responses to an online survey as indicating support by the respondents.

The notice and invitation to participate were distributed through several channels:

- ads in local newspapers (Clackamas Review, Gresham Outlook, Portland Tribune and Tigard Times)
- email invitation through neighborhood association, community planning organization, community participation organization and community-based organization networks
- email invitation to 1,993 subscribers to the Regional Transportation Plan interested persons list
- email to community leaders who had participated in 2018 Regional Transportation Plan discussions, asking them to distribute the invitation through their networks
- Metro News (oregonmetro.gov/news)
- the Metro Twitter feed @oregonmetro

Metro facilitated the discussion and selection of the projects through two transportation-specific Metro advisory committees – the Transportation Policy Alternatives Committee (TPAC) and JPACT. These committees were forums for discussion, coordination, consultation, and decision-making by elected officials and their staffs, representing cities and counties of the region, public agencies and transportation providers, including the Oregon Department of Transportation, Oregon Department of Environmental Quality, the Port of Portland, TriMet and South Metro Regional Transit (SMART). TPAC includes community representatives as regular members, bringing their perspective to those discussions and making recommendations on decisions.

Legal Antecedents

This resolution allocates transportation funds in accordance with the federal transportation authorizing legislation (currently known as Bipartisan Infrastructure Law or BIL) as implemented through the Code of Federal Regulations Title 23, Part 450, Subparts A and C and relevant rules issued by the USDOT. The allocation process is intended to implement the 2025-2027 Regional Flexible Fund Allocation program direction as defined by Metro Resolution No. 21-5194, For the Purpose of Adopting the 2025-2027 Regional Flexible Funds Program Direction for the Portland Metropolitan Area, adopted September 9, 2021.

Anticipated Effects

Adoption of this resolution would direct staff to program funding in the amounts specified to the identified transportation programs and projects into the upcoming 2024-2027 MTIP so they may become eligible to receive those federal transportation funds.

Financial Implications (current year and ongoing)

Adoption of the resolution would commit federal grant funding for Metro Transportation Planning activities. These grants are administered on a cost reimbursement basis, requiring Metro to incur costs associated with the planning activities prior to receiving reimbursement thereby incurring carrying costs. Furthermore, the grants require a minimum match from Metro of 10.27% of total costs incurred. Funding for this allocation of grants will occur in Federal Fiscal Years 2025, 2026, and 2027. Federal Fiscal Year 2025 grant funds would typically be utilized by Metro in Metro Fiscal Year 2025-26 (July 1, 2025

– June 30, 2026). Federal Fiscal Year 2026 grant funds would typically be utilized by Metro in Metro Fiscal Year 2026-27 (July 1, 2026 – June 30, 2027). Federal Fiscal Year 2027 grant funds would typically be utilized by Metro in Metro Fiscal Year 2027-28 (July 1, 2027 – June 30, 2028). The Planning and Development Department is able to request advancing the allocation of these funds to an earlier year, however, if there is funding program capacity need and the budget capacity for local match is available.

The proposed allocation to MPO Planning would require Metro match of \$175,178 in Metro fiscal year 2025-26, \$180,434 in Metro fiscal year 2026-27 and \$185,847 in Metro fiscal year 2027-28 for transportation planning activities. Additionally, match would be required for the portion of the Regional Travel Options (RTO) program funding utilized for Metro-led expenditures. Approximately 30 percent of the RTO program funding is currently utilized for this purpose. Metro sometimes provides the local match requirement for Corridor Planning activities, though this requirement is often met by partner agency contributions to a corridor planning project.

BACKGROUND

The RFFA represents the region's direct implementation of the funding priorities defined in the RTP. As the only transportation funding under the purview of JPACT and Metro Council (in their MPO oversight role), these funds have historically been used to invest in elements of the transportation system that advance key policy objectives.

Every three years, the region undergoes a process to affirm the policy direction and select investments to be funded with the Regional Flexible Funds. Since the 2012-2013 RFFA cycle, the region has followed a two-step approach to allocating these funds. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives. Step 1 provides funding for regional commitments to transit capital and project development bond payments, and continues investments in MPO, system, and corridor planning activities, as well as investing in region-wide programs.

After meeting Step 1 funding commitments, the remainder of the funding comprises Step 2. This portion of funding is targeted to capital projects that support the region's four RTP investment priorities as detailed above.

In September 2021, Metro Council, through Resolution 21-5194, adopted the 2025-2027 RFFA Program Direction. This action created the policy direction for investment of a forecasted total of \$142.35 million in federal transportation funds allocated to the region.

Subsequent to adoption of Resolution 21-5194, passage of the federal Infrastructure, Investment and Jobs Act (IIJA) resulted in additional federal funding for MPOs. The IIJA added an additional \$10.4 million dollars to the regional revenue forecast. Metro staff prepared a proposal for how these funds could be incorporated into the 2025-2027 RFFA and discussed this proposal with JPACT in April 2022. The proposal recommended increasing the Step 1 amount by \$4.3 million and Step 2 by \$6.1 million. The additional Step

1 funding increased regional investments in corridor project development and Transportation System Management and Operations, and added support for federal discretionary grant applications and the regional aerial photo consortium. Additional Step 2 funding increased the amount available for local capital projects. In total, the forecasted amount of federal funds to be awarded through the 2025-2027 RFFA would be increased to \$152.7 million. JPACT indicated their support for this approach for investment of the additional \$10.4 million.

Following adoption of Resolution 21-5194, Metro conducted a call for project proposals to be considered for allocation of Step 2 funding. The project call opened in November 2021 and proposals were due in February 2022. Through this call for projects and the subsequent technical evaluation and public comment processes, Metro also solicited project applications for up to \$20 million for trails projects. This funding was generated by the voter-approved 2019 Parks and Nature Bond Measure.

Metro received a total of 29 project proposals through this project call. With the help of an ad hoc advisory committee comprised of staff from non-competing agency and non-government organizations, Metro led a technical analysis of the projects, focusing on how well they achieved regional outcomes as identified through the 2018 RTP and the 2019 Parks and Nature Bond Measure.

Beginning in May, a 30-day public comment opportunity was held to gather input about the proposed projects from community members and stakeholders. County coordinating committees and the City of Portland provided further information on which projects they indicated were their priorities for funding.

Through a series of briefings with TPAC and JPACT in May through September 2022, the technical and public comment input was used to develop a draft recommendation for TPAC discussion. Following TPAC's recommendation, JPACT took action in September 2022 to approve the list of projects for Step 2 funding, as indicated in Exhibit A.

The final JPACT-approved package of projects reflects a compromise between multiple sources of input to be considered. The funding package is a balance between policy technical ratings, coordinating committee priorities, assessment of risks to project delivery, public input and other RFFA process policy objectives.

The overall performance of these investments aligns with the regional performance-based and congestion management process, detailed in Appendix L of the 2018 RTP. The Step 1 programs and Step 2 projects selected for funding advance the region's system performance goals and objectives by making communities more walkable, improving access to jobs, improving people's travel choices, reducing greenhouse gas emissions, and making the system safer, more reliable, and efficient. Many of the projects funded are either on or adjacent to roads on the regional congestion management network. The 2025-2027 RFFA makes system improvements through dedicating funding to demand and system management strategies, and supporting efficient land use decisions through investments in walking, bicycling, and transit.

ATTACHMENTS

Exhibit A: 2025-2027 RFFA list of investments

Exhibit B: 2025-2027 RFFA Conditions of Approval

Exhibit C: 2025-2027 RFFA Public Comment Report

draft

2025-2027 Regional Flexible Funds Allocation

Exhibit A to Resolution No: 22-5284

Step 1: Regional Bond Commitments and Region-wide Program Investments	
Transit + Project Development Bond Commitment	\$ 65,280,000
Corridor and Systems Planning	\$ 4,737,483
MPO Planning (in lieu of dues)	\$ 4,730,789
Federal Grant Application Support	\$ 500,000
Regional Travel Options + Safe Routes to School	\$ 11,102,371
Transit Oriented Development	\$ 11,806,111
Transportation System Management and Operations/ITS	\$ 6,943,432
Regional Arial Photo/LiDAR	\$ 300,000
Step 1 Total:	\$ 105,400,186

Step 2: Capital Investments			
Project name	Applicant	Sub-region	Amount
148th Avenue	City of Portland	Portland	\$ 7,100,335
162nd Avenue	City of Gresham	Multnomah Co	\$ 7,575,882
57th Avenue-Cully Blvd	City of Portland	Portland	\$ 7,643,201
Beaverton Creek Trail	Tualatin Hills Parks & Rec	Washington Co	\$ 2,055,647
Council Creek Trail	Washington County	Washington Co	\$ 5,511,000
Fanno Creek Trail	City of Tigard	Washington Co	\$ 1,606,705
I-205 Multi-Use Path	Clackamas County	Clackamas Co	\$ 1,094,858
N Portland Greenway (Columbia Bl to Cathedral Pk)	City of Portland	Portland	\$ 4,860,647
Sandy Blvd	Multnomah County	Multnomah Co	\$ 6,500,000
Wilamette Falls Drive	City of West Linn	Clackamas Co	\$ 3,497,580
Step 2 Total:			\$ 47,445,855

Total 2025-2027 RFFA:	\$ 152,846,041
------------------------------	-----------------------

2025-2027 RECOMMENDED REGIONAL FLEXIBLE FUND AWARDEE CONDITIONS OF APPROVAL

Conditions of approval are mechanisms to ensure that projects are planned, designed, and built consistent with the project applications as approved by JPACT and Metro Council, with federal regulations and with regional program policies. Projects can be reviewed at any point in the process for consistency with the conditions of approval and action taken if they are not adhered to.

There are two sets of conditions which apply to Regional Flexible Fund-awarded projects: 1) conditions which address all projects; and 2) project-specific conditions.

The conditions for all projects outline expectations pertaining to the use of funds, project delivery, process, etc. The project-specific conditions outline expectations to create the best project possible in accordance to regional program policies and federal regulations. Recognizing that projects are at different stages of development (i.e. some are in planning phases while others are ready for construction), Metro may choose to waive or modify certain conditions for a project based on what is appropriate for the project's stage in development.

Conditions applied to all projects and programs:

1. Funding is awarded to the project as outlined in the JPACT-approved and Metro Council-adopted 2025-2027 Regional Flexible Fund Allocation (RFFA). If any project is determined to be unfeasible or is completed without expending all of the Regional Flexible Funds awarded, any remaining Regional Flexible Funds for that project shall revert back to Metro to the regional pool for the 2028-2030 Regional Flexible Fund allocation, to be distributed among the region, per the RFFA Program Direction. Or the project sponsor/local jurisdiction receiving the flexible funds for the project may request reallocation of the funds per the Metropolitan Transportation Improvement Program (MTIP) amendment process. Reallocation may necessitate JPACT and Metro Council approval.
2. The award amount is the total amount of Regional Flexible Funds provided to deliver the awarded project as it is defined in the project application and as approved by JPACT and Metro Council. The project sponsor/local jurisdiction is expected to resolve any cost overruns or unexpected costs to emerge. It is understood by the project sponsor/local jurisdiction that Metro and the Regional Flexible Fund program does not have any further financial commitment/responsibility beyond providing the amount awarded.
3. Project scopes will include what is written in their project application narrative and project refinements in response to comments. Project schedules and budget will include what is determined during the pre-implementation phase to take place after adoption of the 2025-2027 RFFA. Changes in project scopes, schedules, and budget must be requested and made in writing to the MTIP Project Manager utilizing the amendment procedures adopted in the MTIP (Please see 2024-2027 MTIP Administration section.) Changes in project scopes must be approved by Metro to ensure the original intent of the project is still being delivered.
4. All projects will follow the design approach and decision-making process as defined in the [Designing Livable Streets and Trails Guide](#)¹ (Metro; 3rd edition; October 2019) and

¹ <https://www.oregonmetro.gov/tools-partners/guides-and-tools/guidelines-designing-livable-streets-and-trails>

any updates in effect at the time a funding intergovernmental agreement is signed. Other street and trail design guidelines, including those developed by local jurisdictions, the National Association of City Transportation Officials, the Institute of Transportation Engineers, the Oregon Department of Transportation, the American Association of State Highway and Transportation Officials, and the Federal Highway Administration, may also be referred to as long as the design approach and decision making process used are consistent with Metro's guidelines.

5. All projects will update local network maps and provide relevant network data to Metro. Metro will provide guidelines on network data submissions upon request. Additionally, all bicycle and pedestrian projects will implement sufficient wayfinding signage consistent with Metro sign guidelines (Ex. [Metro's Intertwine Design Guidelines](#).)² and the Manual on Uniform Traffic Control Devices.
6. All projects with ITS elements will be consistent with National ITS Architecture and Standards and Final Rule (23 CFR Section 940) and Regional ITS Architecture. This includes completing a systems engineering process during project development to be documented through the systems engineering form and submitted to Metro for inventory purposes. For further guidance, consult [ODOT's ITS compliance checklist](#).³
7. All projects implementing Transportation System Management and Operations (TSMO) elements will provide information to Metro on the TSMO elements for inventory purposes. Metro will provide guidelines on how to provide TSMO data submissions.
8. All local jurisdiction/project sponsors shall acknowledge Metro as a funding partner. Acknowledgement will attribute credit to Metro on all project materials (print or electronic), such as reports, newsletters, booklets, brochures, web pages, and social media posts. Attribution on materials must read "Made possible with support from Metro." If marketing is done with audio only, spoken attribution language must be "This project is made possible with support from Metro." The local jurisdiction/sponsor delivering the project will include the Metro logo on all print ads, banners, flyers, posters, signage, and videos. Grantee will include the Metro logo on all marketing and advertising materials, both print and online (size permitting). Metro will provide partners with Metro logos and usage guidelines. Lastly, the local jurisdiction/project sponsor will extend invitations to Metro Councilors to attend events or engagements pertaining to the project.
9. All projects will carry out public involvement processes that meet federal Title VI and environmental justice requirements. As appropriate, local data and knowledge shall be used to supplement analysis and inform public involvement. Metro guidelines for public involvement can be found in the [Public Engagement Guide Appendix G: Local Engagement and Non-Discrimination Checklist](#).⁴
10. All projects will implement transportation demand management strategies/activities in conjunction with the delivery and opening of the project to enhance the success and performance of the project. Local jurisdiction/project sponsors must request and receive Metro approval to waive the requirement for transportation demand management activities.

² <https://www.oregonmetro.gov/sites/default/files/2018/01/05/2017-Intertwine-Trail-sign-guidelines.pdf>.

³ <https://www.oregon.gov/odot/Maintenance/Documents/ITS-QualityPlan.pdf>

⁴ http://www.oregonmetro.gov/sites/default/files/final_draft_public_engagement_guide_112113.pdf

11. All projects are expected to measure the progress and performance of the RFFA-funded project. Local jurisdictions/project sponsors will identify a set of indicators for data collection and pre-and post-project monitoring. Metro will provide input and feedback into the indicators and datasets, especially to help respond to regional transportation performance measures. Indicators can be determined during the pre-implementation phase of the project.
12. Non-Certified agencies receiving Regional Flexible Funds to deliver a project will be expected to work directly with a certified agency or ODOT to determine the administration and delivery of the project. Such agencies will comply with ODOT Local Agency Liaison (LAL) project pre-implementation requirements (e.g. completion of detailed scope of work, budget, project prospectus, etc.). The ODOT LAL requirements are expected to be in the proper format as part of the federal delivery process to facilitate MTIP & STIP programming, initiate development and execution of the Intergovernmental Agreement (IGA), and obligate and expend awarded federal funds for the project.

The awarded lead agency is required to complete or participate in the following project delivery & monitoring activities:

- Kick-off Meeting Coordination.
- MTIP/STIP programming to a realistic project delivery schedule that accounts for meeting funding obligation targets.
- Participate in project coordination meetings and reviews as called for and scheduled.
- Completing project pre-implementation (Pre-Preliminary Engineering or Planning phase obligation) actions and milestones to ensure project proceeds on schedule, including completing a project scoping document with a thorough scope, schedule and budget with milestones and deliverables.
- Complete and execute a project IGA in time to obligate funds as programmed
- Participation in Project Delivery Actions, including attending Project Development Team (PDT) review meetings, completing and submitting project Milestone Reports and Progress Updates, providing any performance measurement project data, providing project delivery status updates, and addressing questions raised by the Metro advisory committees.
- Providing project close-out/final reports and billings.

Conditions applied to specific projects and programs:

TO BE DETERMINED BASED ON STEP 2 PROJECT SELECTION

Memo

Date: September 6, 2022
To: JPACT and Interested Parties
From: Dan Kaempff, Principal Transportation Planner
Subject: 2025-2027 Regional Flexible Funds Allocation Package – recommendation from TPAC

Purpose

Review and take action on the recommendation from TPAC on the 2025-2027 Regional Flexible Funds Allocation (RFFA) Step 2 package of projects (Resolution 22-5284).

Background

In their September 2 meeting, TPAC recommended a list of ten projects to be considered by JPACT for approval to be funded through the Step 2 funding identified in the 2025-2027 Regional Flexible Funds Allocation (RFFA). In this meeting, JPACT is requested to consider and take action to recommend to Metro Council the adoption of a final RFFA investment package as detailed in the materials for Resolution 22-5284 included in the meeting packet. This resolution approves a total of \$152.8 million of federal transportation funding to be allocated to the Step 1 and Step 2 investments as detailed in Exhibit A to Resolution 22-5284.

The Step 1 investments and the Step 2 funding amount were previously identified in adoption of the 2025-2027 RFFA Program Direction (Resolution 21-5194, adopted by Metro Council September 9, 2021.)

Subsequent to that funding decision, \$10.4 million in additional federal funding became available to the region resulting from passage of the federal Infrastructure, Investment and Jobs Act (IIJA), also known as the Bipartisan Infrastructure Bill (BIL). Following discussion in April 2022 with JPACT on a proposal for investing these funds through the RFFA, funding for Step 1 investments was increased by \$4.3 million, and Step 2 project funding was increased by \$6.1 million.

This brings the amounts of regional funding allocated to \$105,400,186 in Step 1 and \$47,445,855 in Step 2, with a combined total of \$152,846,041.

TPAC Step 2 recommendation

TPAC's recommendation is based on Example 2 as discussed in the August TPAC and JPACT meetings. The recommendation funds the top two priority projects in each sub-region and then funds additional projects based on their combined Equity and Safety ratings. This results in ten projects being funded at their full requested amounts. 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.

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

TPAC Discussion

In addition to the RFFA funding recommendation, TPAC raised several other issues for JPACT's consideration and discussion:

Inadequate funding – TPAC indicated that their funding recommendation does not adequately fund the region's transportation needs. Many necessary projects were unable to be funded, even though they deserved to be, due to the limited amount of available funding.

Needs of arterial streets – Urban arterials have significant needs that are not being met under the current funding situation. TPAC stressed the need for discussions on how to address these needs and whether the RFFA process is appropriately considering the needs and priorities of arterials relative to other transportation needs.

Identifying projects for future funding opportunities – TPAC requested discussion and consideration of the value of creating a process for identifying additional projects to be

funded should additional funding be available. Additional funding could be available if there was more RFFA funding available than what was forecasted. A proposed amendment to prioritize two specific projects for funding should actual funding exceed the forecast was considered at the TPAC meeting but did not pass. If there was interest in this topic, feedback on the following questions and observations from TPAC would be desired:

- Do JPACT and Metro Council want to have additional engagement on this issue and perhaps identify additional priority projects as an “on-deck” list?
- If a procedure was developed, would it be specific to the 2025-2027 RFFA funding cycle, or should the region consider it being developed as an on-going process?
- If pursuing this concept, should the process emphasize lower-cost project development work that would be more affordable for potential additional funds? What would be the role of sub-regional priorities in developing such a list?
- There were comments about not losing the focus on project performance relative to the adopted policy outcomes if this process is considered for moving forward.
- There was also caution against developing additional funding processes without opportunities for public awareness and input. Simply funding additional low-cost projects from the RFFA proposals without having a clear process and rationale for doing so was identified as not good public policy making.
- Metro staff identified several procedural mechanics that would need to be addressed to develop such a procedure that would result in additional staff and committee time both to develop and to implement on an on-going basis.

Discussion of regional parity - There were comments about whether there could be more consideration of how to articulate and incorporate program direction on geographic parity or “fairness” when allocating funds, while recognizing federal rules that do not allow sub-allocation of funds. Current program direction is to “Select projects from throughout the region; however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.” This issue can be taken up in the development of the Program Direction for the 2028-30 RFFA process (to begin in 2024).

Action requested

Staff is requesting that JPACT approve the TPAC-Step 2 recommendation and the package of projects as defined in Resolution 22-5284 and submit it to Metro Council for adoption.

6.1 2023 Regional Transportation Plan (RTP) Vision & Goals

Information/Discussion Items

Joint Policy Advisory Committee on Transportation
Thursday, September 15, 2022

JPACT Worksheet

Agenda Item Title: Draft Vision and Goals for the 2023 Regional Transportation Plan

Presenters: Kim Ellis, RTP Project Manager

Contact for this worksheet/presentation: Kim Ellis, kim.ellis@oregonmetro.gov

Purpose/Objective

Staff is seeking JPACT feedback on and support for the draft vision and goals for the 2023 Regional Transportation Plan (RTP) in **Attachment 1**.

Outcome

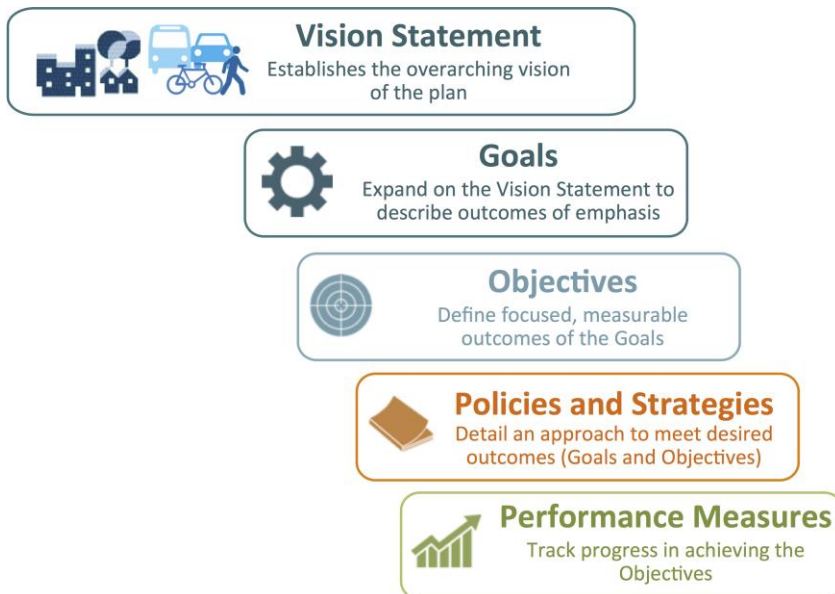
JPACT discussion and input on these policy questions:

1. Do the draft vision and goals reflect JPACT's priorities and input to date?
2. Is anything important missing? Do you have suggestions for ways to improve the draft vision or goals?
3. Does JPACT support the draft vision and goals?

Background and context

A major update to the [Regional Transportation Plan](#) (RTP) is underway. 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 RTP establishes a long-term vision and goals (and supporting objectives) for the future of transportation. Together with the plan's policies, the vision and goals guide planning and investment priorities to meet the transportation needs of our growing and changing region. This outcomes-based framework is summarized in **Figure 1**.

Figure 1. RTP performance-based planning and decision-making framework



Source: 2018 Regional Transportation Plan

Public and stakeholder input received during the scoping phase and during the first phase of the RTP 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, the Transportation Policy Alternatives Committee (TPAC) and JPACT requested additional discussion of the RTP vision and goals. The committees wanted to consider ways to further focus the priorities for the 2023 RTP and the role of the RTP in supporting the region’s economic vitality.

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

Staff last presented on this item to JPACT on June 30, 2022 at a joint workshop of JPACT and the Metro Council. In that workshop, members of JPACT and the Metro Council discussed ideas for updating the RTP vision and goals to shape development of the 2023 RTP. A summary of the joint workshop is provided in **Attachment 2**.

Since the workshop, staff drafted an updated vision and goals that focus on priorities and outcomes that the 2023 RTP can measurably address. On September 2, TPAC reviewed and provided feedback on the draft vision and goals prepared by staff.

Specific TPAC feedback included:

- Add a more explicit reference to climate in vision statement
- Expand the climate goal (Goal 2) to include reducing vehicle miles traveled per person consistent with state climate goals and requirements for the RTP to address
- Add “deaths” to beginning of Goal 3 to explicitly call out eliminating traffic deaths as a goal
- Add “jobs” and “efficiency” to Goal 4
- Add a new goal called “vibrant and prosperous communities” that connects 2040 land uses and a strong economy being served by a multimodal transportation system that helps people, communities and businesses thrive and prosper.

The changes identified by TPAC are reflected in the draft vision and goals in **Attachment 1**.

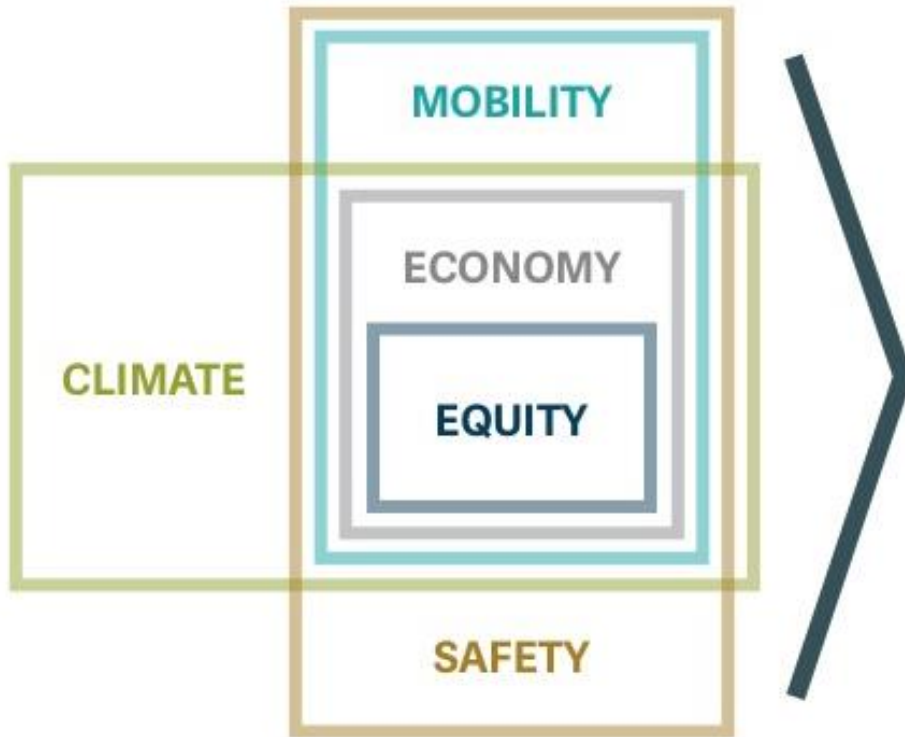
Next steps

JPACT and the Metro Council are scheduled to review and provide feedback on the draft vision and goals on September 15 in separate meetings. Following these meetings, staff will update the draft vision and goals if needed to address feedback received and begin updating the plan’s objectives to align with the draft vision and goals. Pending JPACT and Metro Council support, the draft vision and goals will guide development of the 2023 RTP.

What packet material do you plan to include?

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

DRAFT VISION AND GOALS FOR THE 2023 REGIONAL TRANSPORTATION PLAN



Vision →

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

DRAFT GOALS FOR THE 2023 REGIONAL TRANSPORTATION PLAN



EQUITABLE TRANSPORTATION

Transportation system disparities experienced by Black, Indigenous and other people of color and people with low income, are eliminated. The disproportionate barriers people of color, people with low income, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.

CLIMATE ACTION & RESILIENCE

People, communities and ecosystems are healthier and more resilient and carbon emissions and other pollution are reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.

SAFE SYSTEM

Deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.

VIBRANT & PROSPEROUS COMMUNITIES

Greater Portland's centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities and businesses thrive and prosper.

MOBILITY OPTIONS

People and businesses can reach the jobs, goods, services and opportunities they need by affordable travel options that are safe, connected, convenient, reliable, efficient, 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.

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 McEnerney-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

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,

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 McEnery-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.

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.

"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

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.

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?

"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

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.

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




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

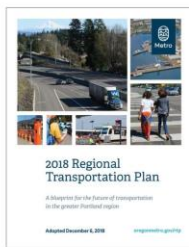
Context and background

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



Implemented through adopted community and regional plans



Building toward six desired outcomes

6

Inclusive, equitable engagement built the 2018 RTP

Nearly 19,000 individual touch points from 2015-18

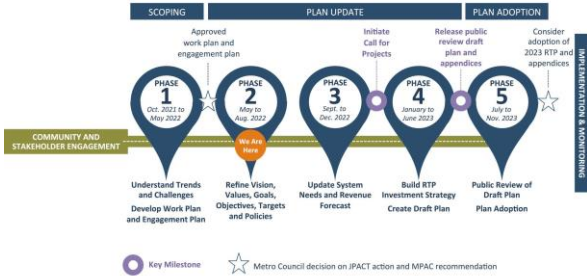
Many meaningful opportunities to listen, learn and collaborate



Partnerships and collaboration will continue in this update

Nearly 19,000 individual touch points from 2015-18

2023 RTP timeline



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	

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

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

MARK YOUR CALENDARS!

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

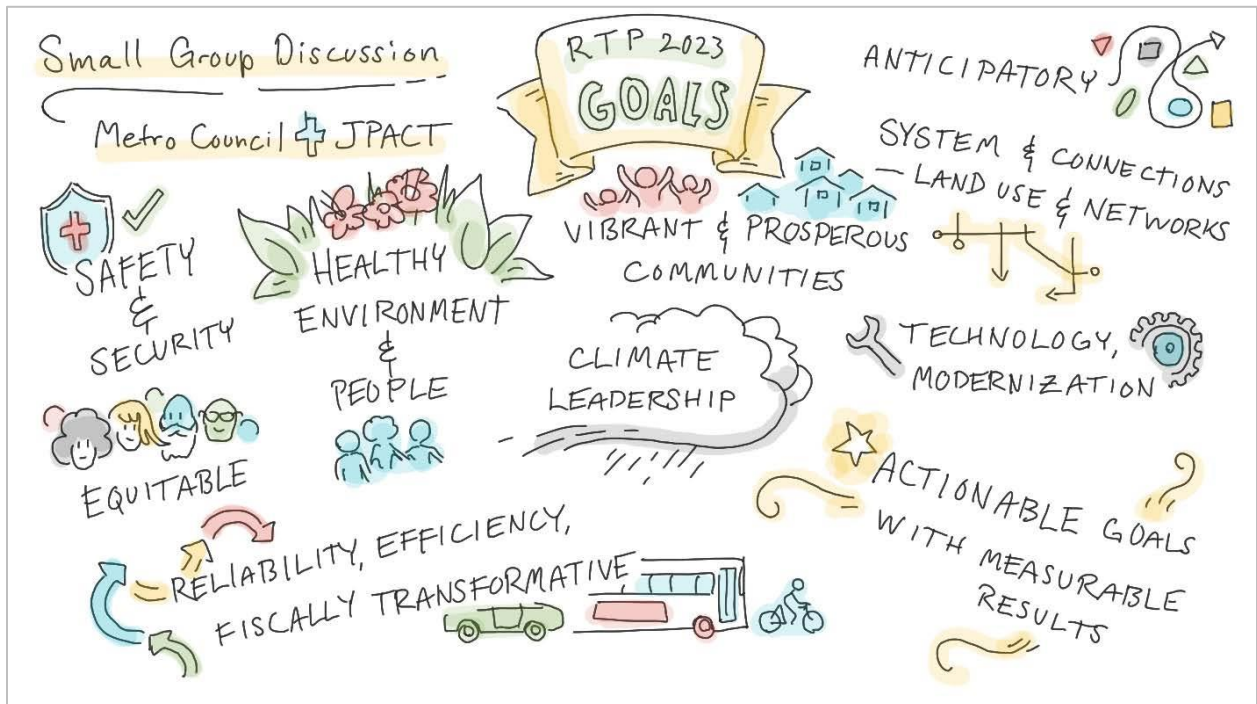
20

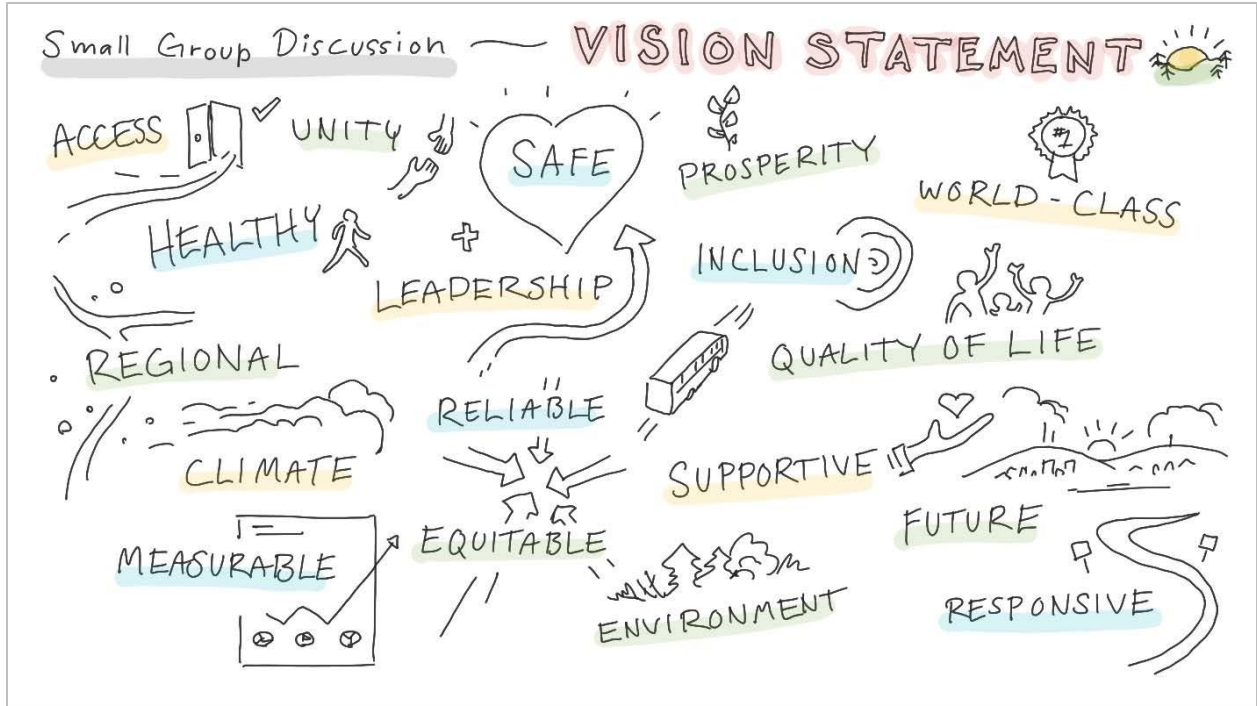
Learn more about the **Regional Transportation Plan** at:



Kim Ellis, AICP
RTP Project Manager
kim.ellis@oregonmetro.gov | 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:	https://youtu.be/r2_ZkCoOU_c
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

- 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:

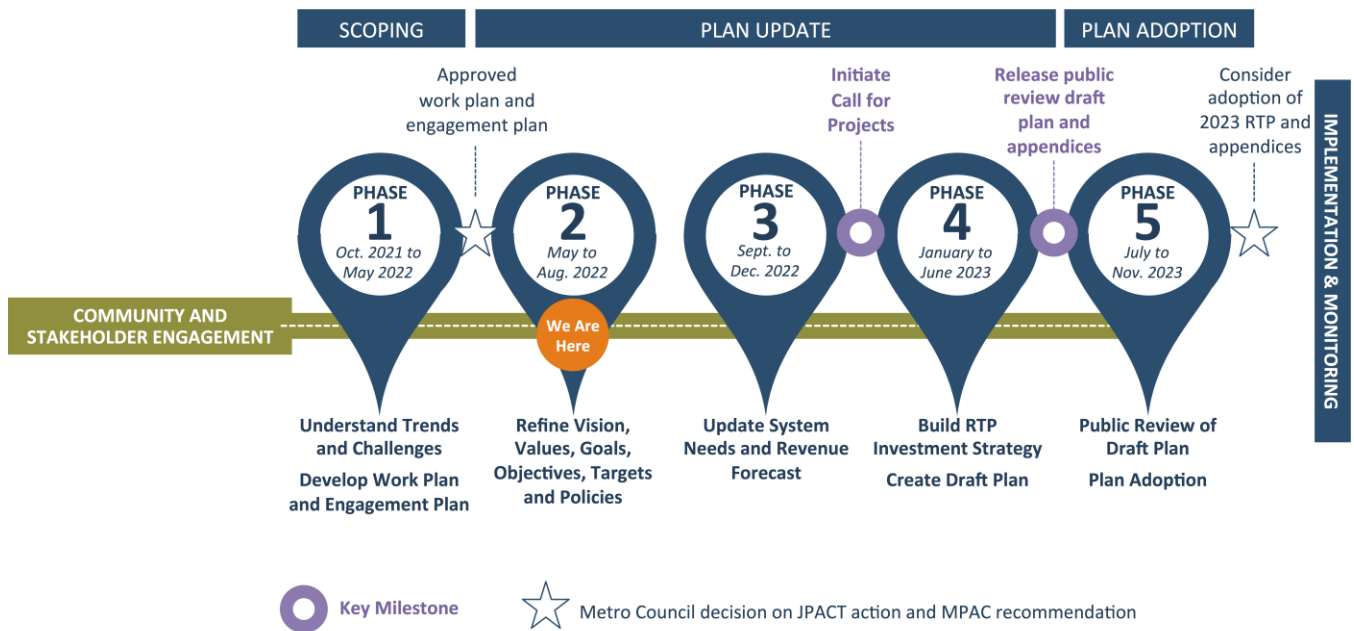
- **a long-term vision** for the region's transportation system;
- **eleven goals and supporting objectives and performance targets** that identify what outcomes the region wants to achieve and indicators to measure progress;
- **policies** that guide decisions and actions in pursuit of our vision and 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.



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.¹

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

¹ 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 under-represented 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	24%	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	4%	11%
Black or African American	3%	5%
Hispanic, Latino or Spanish origin	5%	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	2%	6%
\$30,000 to \$39,999	3%	7%
\$40,000 to \$49,999	4%	14%
\$50,000 to \$74,999	7%	17%
\$75,000 to \$99,999	15%	13%
\$100,000 to \$149,999	14%	19%
\$150,000 or more	19%	20%
Don't know/prefer not to answer	19%	--

6.2 Regional Congestion Pricing Policy

Information/Discussion Items

Joint Policy Advisory Committee on Transportation
Thursday, September 15, 2022

JPACT Worksheet

Agenda Item Title: 2023 Regional Transportation Plan Policy Brief –Pricing Policy Development

Presenters: Alex Oreschak, Metro

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

Purpose/Objective

Discuss with and receive feedback from JPACT on revised proposed pricing policy language for the 2023 Regional Transportation Plan (RTP).

Outcome

Provide input and comment on the proposed pricing policy language for the 2023 RTP update.

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

JPACT received presentation on the RTP pricing policy language at the July 28, 2022 JPACT/Council workshop, and was given the opportunity to discuss and provide input on the draft pricing policy language. That language has been updated to reflect input from TPAC, JPACT, and Metro Council.

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, and at the joint JPACT & Metro Council workshop on July 28, 2022.

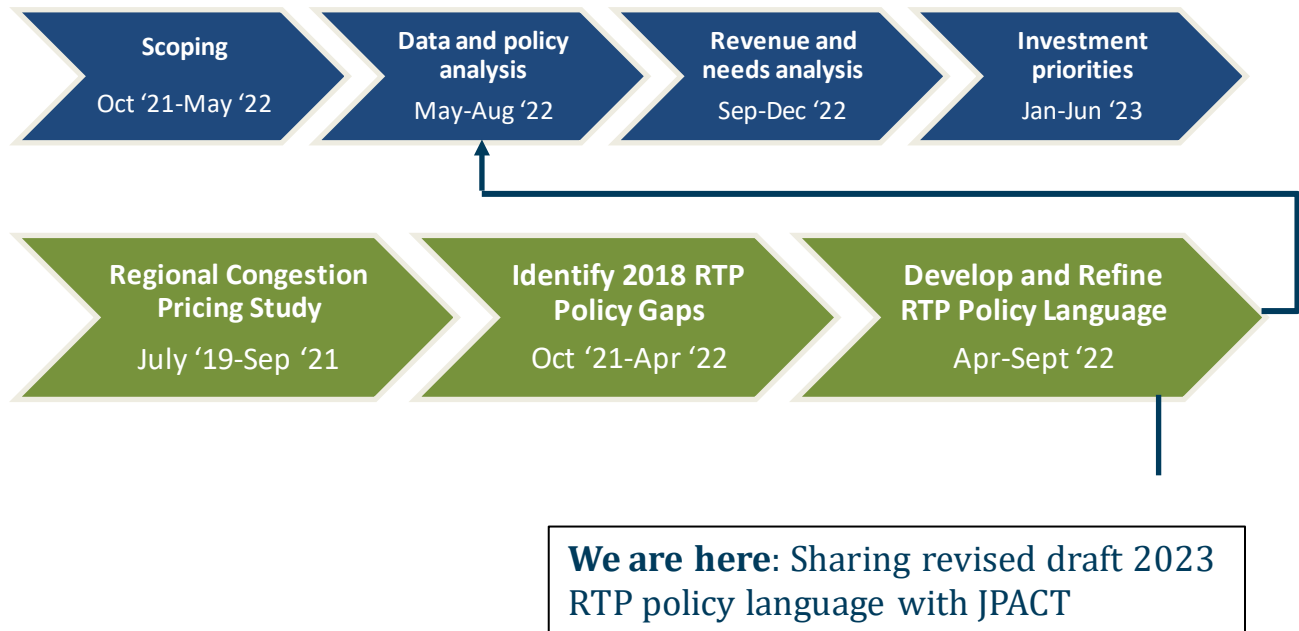
Metro staff and the consultant team have further revised the draft language to reflect input received at and following those two meetings; the revised draft language is documented in **Attachment 1: Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context 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 JPACT 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 JPACT 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.

What packet material do you plan to include?

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.¹

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).

¹ 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.²
- **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.³
- **Travel patterns for people and goods are unreliable.** The Portland metro region is the 11th most congested region in the country.⁴ 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

² 2021 Pricing Options for Equitable Mobility Final Report.

³ 2012 Portland Air Toxics Solutions Committee Report and Recommendations, Oregon Department of Environmental Quality.

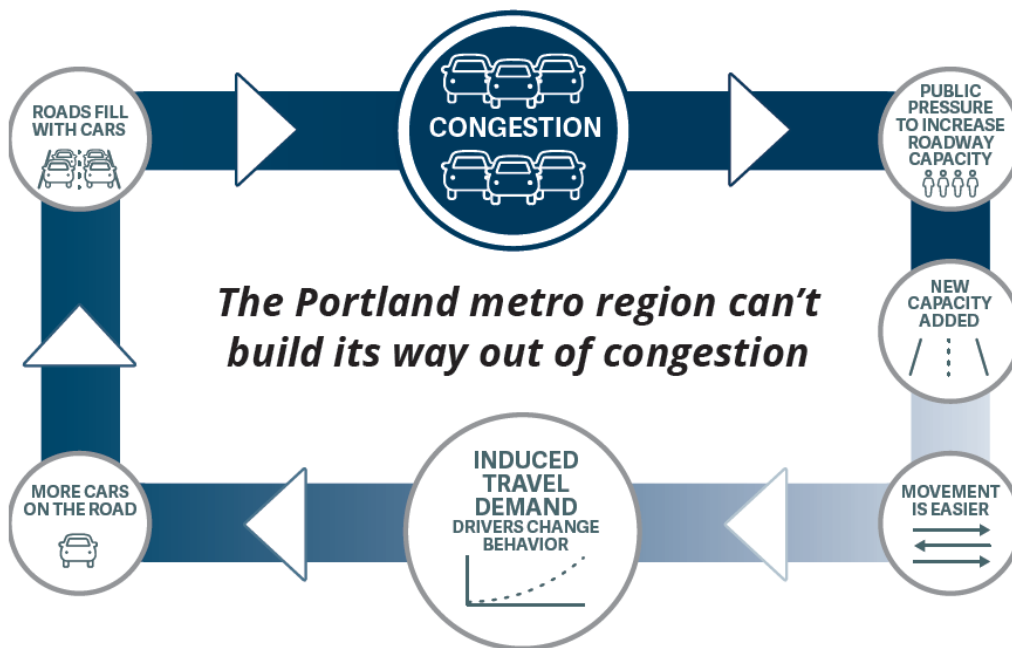
⁴ 2021 Inrix Global Scorecard.

congestion.⁵ After a brief subsidence with the COVID-19 pandemic, congestion and traffic volumes are on the rise again.⁶

- **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 2040.⁷

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



⁵ 2040 Freight Existing Conditions Report, July 2021.

⁶ [2022 ODOT Impacts of Covid-19 on Traffic](#).

⁷ 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

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

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.

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:

⁸ 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
Transit		
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
Active Transportation		
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
Mode Shift and Single Occupancy Vehicle Alternative Programs		
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.⁹

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.^{10,11}

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

⁹ <https://www.oregon.gov/odot/tolling/Pages/About.aspx>

¹⁰ <https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureAnalysisDocument/61936>

¹¹ <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.¹² 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.¹³

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.¹⁴

Figure 3 Regional Mobility Pricing Project Map



¹² <https://www.oregon.gov/lcd/CL/Documents/CFECOOverviewImplementation.pdf>

¹³ <https://www.oregon.gov/lcd/LAR/Pages/CFEC.aspx>

¹⁴ <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.¹⁵

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.¹⁶

¹⁵ <https://www.interstatebridge.org/faq>

¹⁶ <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.¹

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.¹⁷

Value Pricing Pilot Program

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

¹⁷ 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

- 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** **Diversion:** 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 and Air Quality:** Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.
- Policy 6** **Emerging Technologies:** 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/ 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.

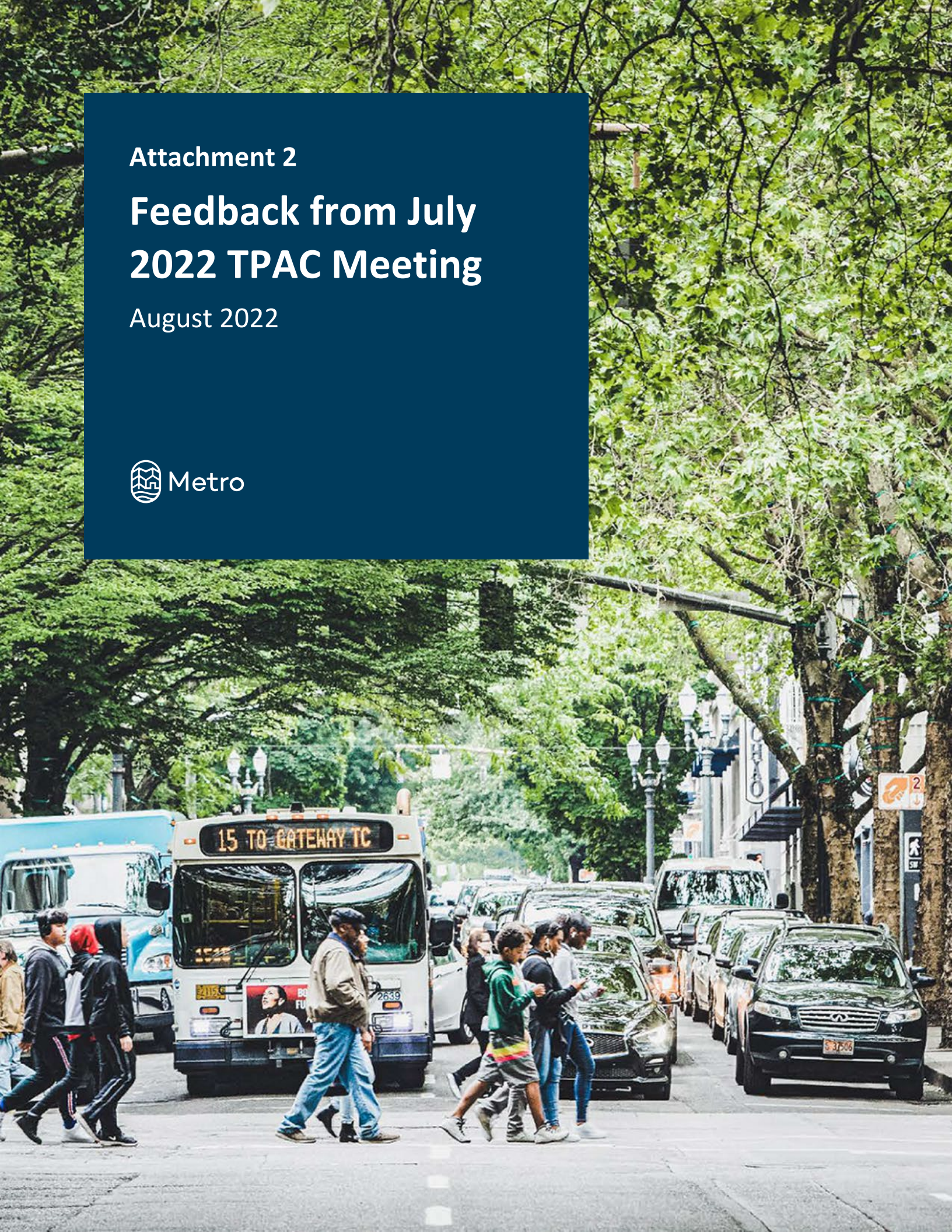
Continue to review other areas of the RTP, including Goals, Objectives, and system policies in Chapter 3 to identify appropriate locations to include policy language supportive of pricing.

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 and copy 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.

Formatted: List Paragraph, Bulleted + Level: 1 + Aligned at: 0.25" + Indent at: 0.5"

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~~29, 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:~~

Policy 1 **Mobility:** ~~I~~ 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 e 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:** ~~R~~ 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****User Experience:** Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Formatted: Font: Not Bold

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.

Formatted: Font: Not Bold, Highlight

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.

Formatted: Highlight

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

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

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.

Formatted: Highlight

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.

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), Highlight

Formatted: Highlight

Formatted: Font: 11 pt, Highlight

Formatted: Font: (Default) +Body (Calibri), 11 pt, Highlight

Formatted: Highlight

Formatted: Font: (Default) +Body (Calibri), 11 pt

Formatted: Font: +Body (Calibri), No underline

Formatted: Font: +Body (Calibri), Bold, No underline

Formatted: Font: +Body (Calibri), No underline

Formatted: Font: +Body (Calibri)

Formatted: Font: Not Bold

The City of Portland created the Pricing Options for Equitable Mobility (POEM). The POEM Community Task Force was established to explore if and how transportation pricing strategies could be used in Portland to advance equitable mobility. The Task Force's charge, as defined in its charter, was to inform Portland Bureau of Transportation (PBOT) and Bureau of Planning and Sustainability (BPS) as they considered if and how new pricing strategies could potentially be used more intentionally to improve mobility, address the climate crisis and advance equity for people historically underserved by the transportation system in Portland, including, but not limited to, BIPOC, Portlanders with low incomes and people with disabilities.

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.

Formatted: Font: +Body (Calibri)

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.

Formatted: Font: +Body (Calibri), No underline

Formatted: Font: +Body (Calibri), Bold, No underline

Formatted: Font: +Body (Calibri), No underline

Formatted: Font: +Body (Calibri)

Formatted: Font: +Body (Calibri)

Formatted: Font: +Body (Calibri), No underline

Formatted: Font: +Body (Calibri), Bold, No underline

Formatted: Font: +Body (Calibri), Bold

Formatted: Font: +Body (Calibri)

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.

Formatted: Highlight

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/ 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 |
s.

- **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 and copy 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

- 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 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:

July 15, 2022

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.

Revised Draft Congestion Pricing Policy Language Worksheet

- 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/ 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 Division

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 and copy 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.

July 15, 2022

Revised Draft Congestion Pricing Policy Language Worksheet

- 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.

July 15, 2022

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 ideas 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 [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 with the discretionary concurrence by the U.S. Secretary of Transportation. See https://ops.fhwa.dot.gov/congestionpricing/value_pricing/ for more detail.

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

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

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

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/ 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 and copy 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

- 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 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/ 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 and copy 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 is 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

Formatted: Font: 11 pt

Formatted: Font: 11 pt

Formatted: Font: 11 pt

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.

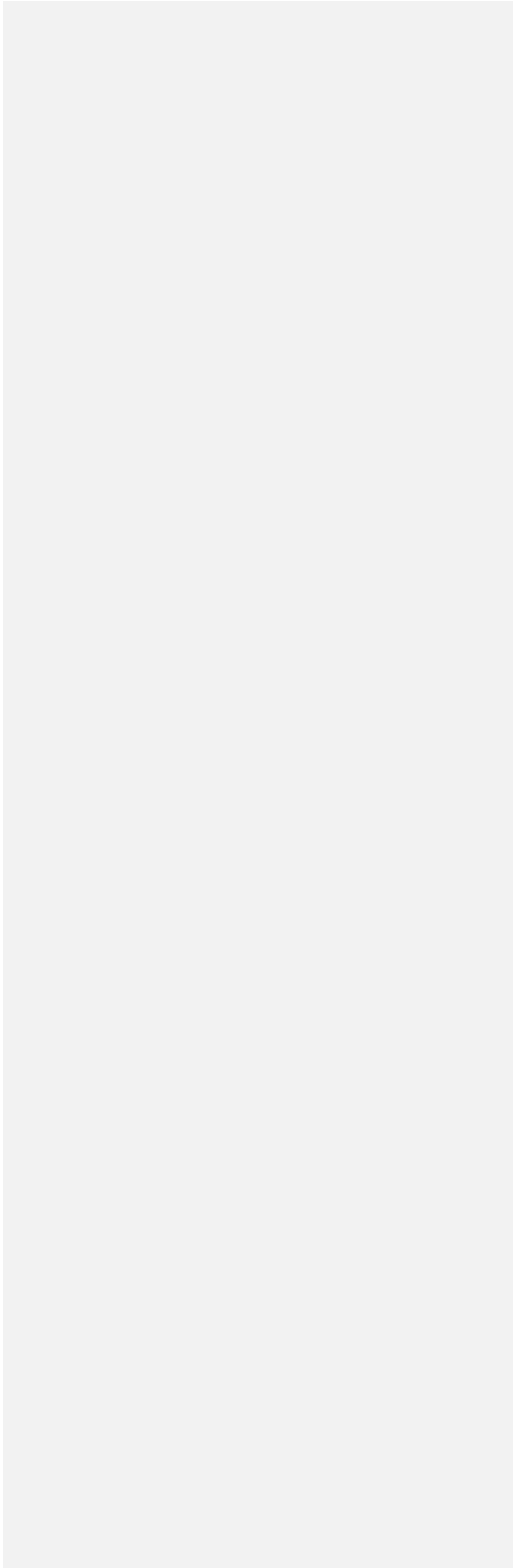
Policy 3 **Safety:** ~~Ensure that pricing programs and projects reduce overall automobile trips and address~~ ~~Improve~~ traffic safety and the safety of users of all modes, both on and off the priced system.

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.

Formatted: Strong, Font: +Body (Calibri), Bold

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.

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....

Commented [CD11]: Don't tie to regional definition of safety need – leave for local discretion and priorities.

Congestion Pricing Policy 4. Diversion: Minimize diversion impacts to nearby unpriced facilities including throughway, arterial, collector and local streets in the project area

Formatted: Font: +Body (Calibri), Bold, Underline

Formatted: Font: +Body (Calibri), Bold, Underline

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

Formatted: Font: Cambria

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)

Formatted: Font: Cambria

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/ 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

Commented [CD23]: Shouldn't be limited to local roads and diversion only.

- **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.

Commented [CD24]: Important to highlight need for transit investments, not just access to transit

- **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.

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

- **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 [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.

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

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

Alternates present

Michael Orman

Affiliation

Department of Environmental Quality (DEQ)

Members excused

Councilor Duncan Hwang
 Commissioner Jessica Vega Pederson
 Curtis Robinhold
 Councilor Juan Carlos Gonzalez
 Commissioner Temple Lentz
 Mayor Steve Callaway

Affiliation

Metro Council
 Multnomah County
 Port of Portland
 Metro Council
 Clark County
 Cities of Washington County

Guest Speakers present

Esme Miller

Affiliation

City of Portland's Pricing Options for Equitable Mobility Member
 ODOT's Equity and Mobility Advisory Committee

Phillip Wu

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.

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.

"... 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

"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.


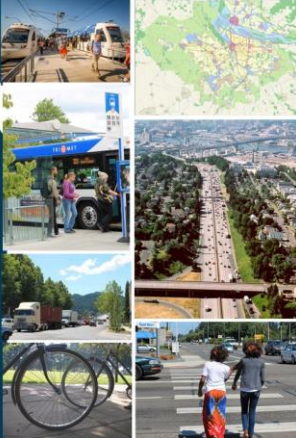
Appendix A: PowerPoint Slides

2023 Regional Transportation Plan

Developing Regional Congestion Pricing Policy

JPACT and Metro Council Workshop 2

July 28, 2022



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




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



Trauma-Informed Perspective

- Community empowerment to drive shared vision of future
- Build on investments
- Support growth and connectivity
- Elimination or reduction of identified barriers
- Provide access to opportunities and advancement
- Shared trust
- Community needs, historical goals and equity
- Address relationships with community
- Acknowledge past injuries and causes of trauma
- Center voices and experiences historically under-served and excluded communities
- Commitment to work together and collaboratively going forward
- Frequent dialog with community

Recognize Signs of Community Trauma

- Community members that cannot make their voices heard or positive change
- Reduced or delayed growth and building of value
- Widespread health challenges, primarily by race
- Loss of sense of place or identity
- Disengagement and lack of community ownership
- Economic, educational, and employment inequalities and disparities
- Health disparities
- Long-term stress and depression and body mass index above those above future

Urban Mobility STRATEGY

Equity and Mobility Advisory Committee's July 2022 Recommended Actions

- Congestion Management
- Revenue Generation Strategy
- Business Investment
- Accountability (RAC and Rate Setting)
- Accountability (2025 and Beyond)

Urban Mobility STRATEGY

THANK YOU!

The Urban Mobility Strategy is an initiative of Oregon's Department of Transportation

Urban Mobility STRATEGY

Context and Background Oregon Highway Plan Tolling Policy Amendment

Amanda Pietz
Policy, Data, & Analysis Division Administrator, ODOT

Garet Prior
Tolling Policy Manager, ODOT

Metro Council/JPACT Work Session

Garet Prior – Toll Policy Manager
Amanda Pietz – Policy, Data, and Analysis Administrator
July 28, 2022

Urban Mobility STRATEGY

Oregon Highway Plan Toll Policy Amendment

Oregon Department of Transportation



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
- 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



Equity and Mobility Advisory Committee & Oregon Transportation Commission




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




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

Urban Mobility STRATEGY www.OregonTolling.org Oregon Department of Transportation

Income Thresholds

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

2021 Federal Poverty Level (FPL)

Source: U.S. Department of Health and Human Services 2021 FPL Poverty Guidelines for 2022 <https://www.fns.gov/ops/programs/food-assistance/docs/2021-fpl-pov-guidelines.pdf>

Urban Mobility STRATEGY www.OregonTolling.org Oregon Department of Transportation

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

Urban Mobility STRATEGY

2023 Regional Transportation Plan Developing Regional Congestion Pricing Policy

Margi Bradway
Deputy Director, Planning, Development & Research, Metro

Alex Oreschak
Senior Transportation Planner, Metro




RTP Congestion Pricing Policy Development
JPACT and Metro Council Workshop 2
July 28, 2022

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


24

Project Context



I-205 Toll Project
OVERVIEW AND TIMELINE





A modern connection for a growing community

25

Community Input



Equity and Mobility Advisory Committee:
Shaping an Equitable Toll Program



PRICING OPTIONS FOR EQUITABLE MOBILITY
FINAL REPORT

26

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



27

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.



28

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 <i>Nelson\Nygaard</i>	 Daniel Firth Transport and Urban Planning Director; Congestion pricing leader in London, Stockholm and Vancouver C40
 Sam Schwartz Founder and CEO, Father of NYC congestion pricing Sam Schwartz Transportation Consultants	 Rachel Hiatt Assistant Deputy Director for Planning; Project manager of the Downtown Congestion Pricing Study San Francisco County Transportation Authority
 Christopher Tomlinson Executive Director; Expert in political policy and legal aspects of tolling State Road and Tollway Authority, Georgia Atlanta-region Transit Link Authority	 Clarissa Cabansagan Director of Programs; National leader in transportation policy and mobility justice TransForm

29

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

30

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

31

- ### 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.
- 32

- ### 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 |
- 33

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	

34

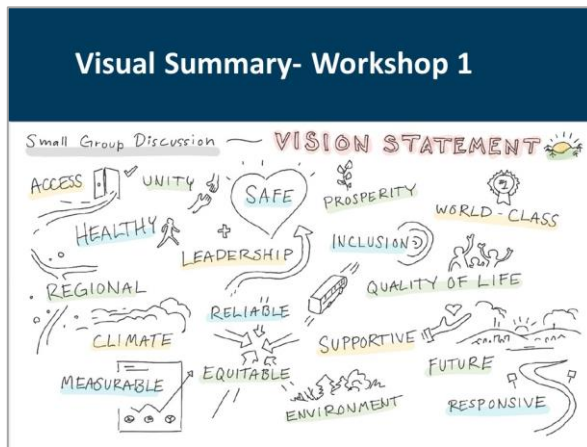
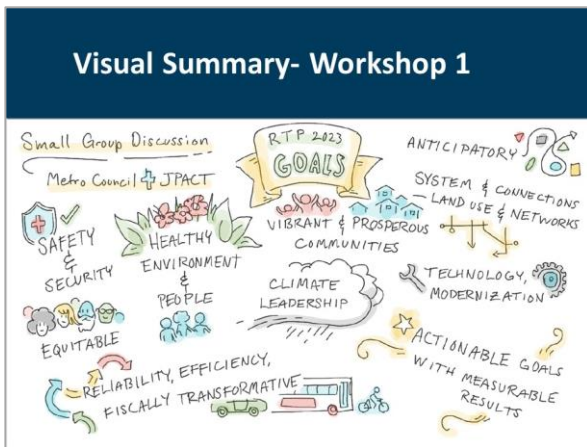
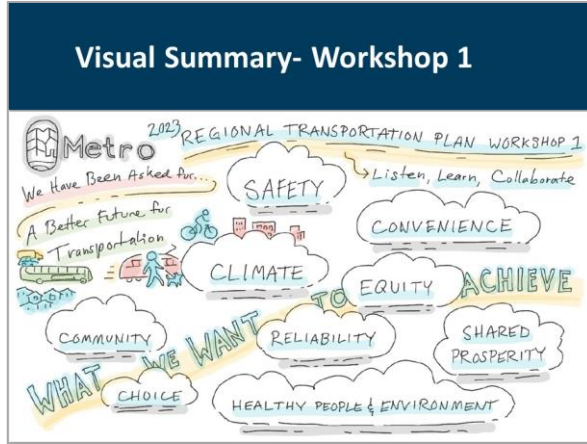
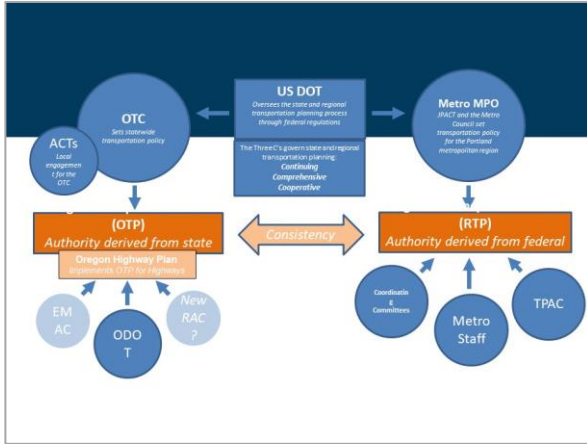
- ### Draft RTP Congestion Pricing Policies
- | | |
|--|---|
| <p>Policy 1 <u>Mobility</u>: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.</p> | <p>Policy 4 <u>Diversion</u>: 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>Policy 2 <u>Equity</u>: Integrate equity and affordability into pricing programs and projects from the outset.</p> | <p>Policy 5 <u>Climate</u>: 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>Policy 3 <u>Safety</u>: 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>Policy 6 <u>Emerging Technologies</u>: 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 **6/30/22** Updating Our Vision and Goals For the Future of Transportation
- 2 **7/28/22** Developing Regional Congestion Pricing Policy
- 3 **9/29/22** Creating Safe and Healthy Urban Arterials
- 4 **10/27/22** Strengthening the Backbone of Regional Transit
- 5 **11/10/22** Working Together to Tackle Climate Change

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

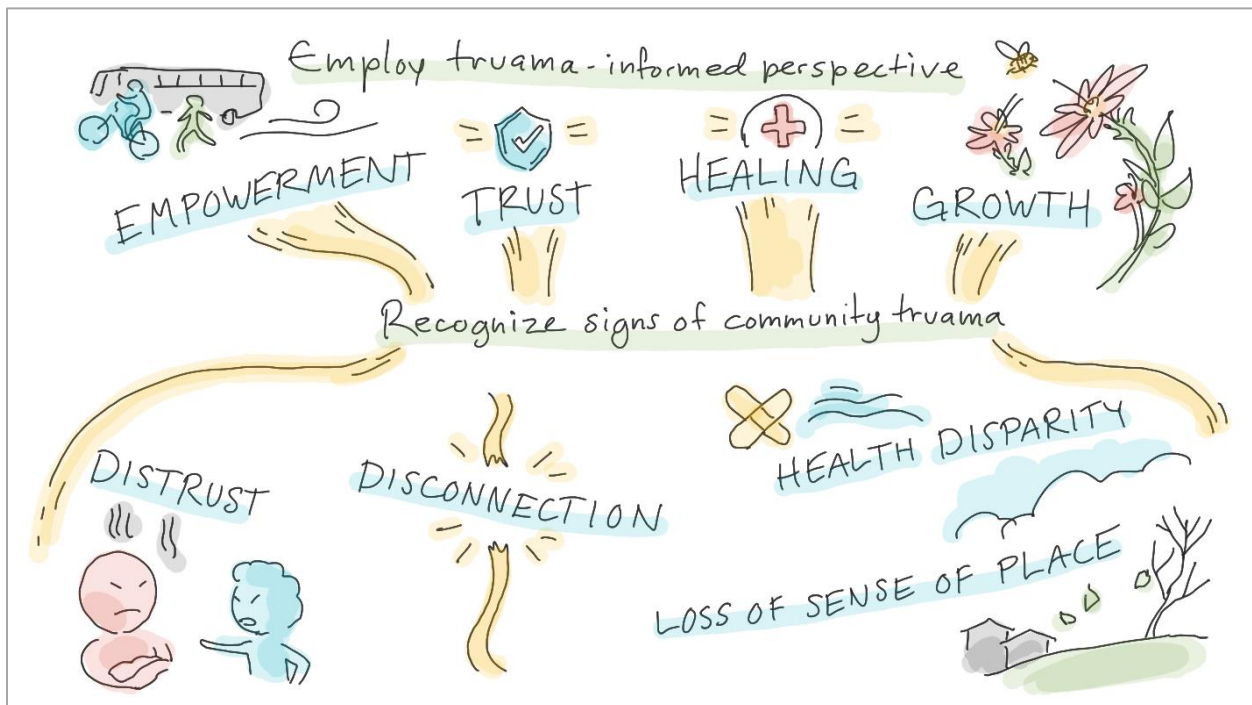
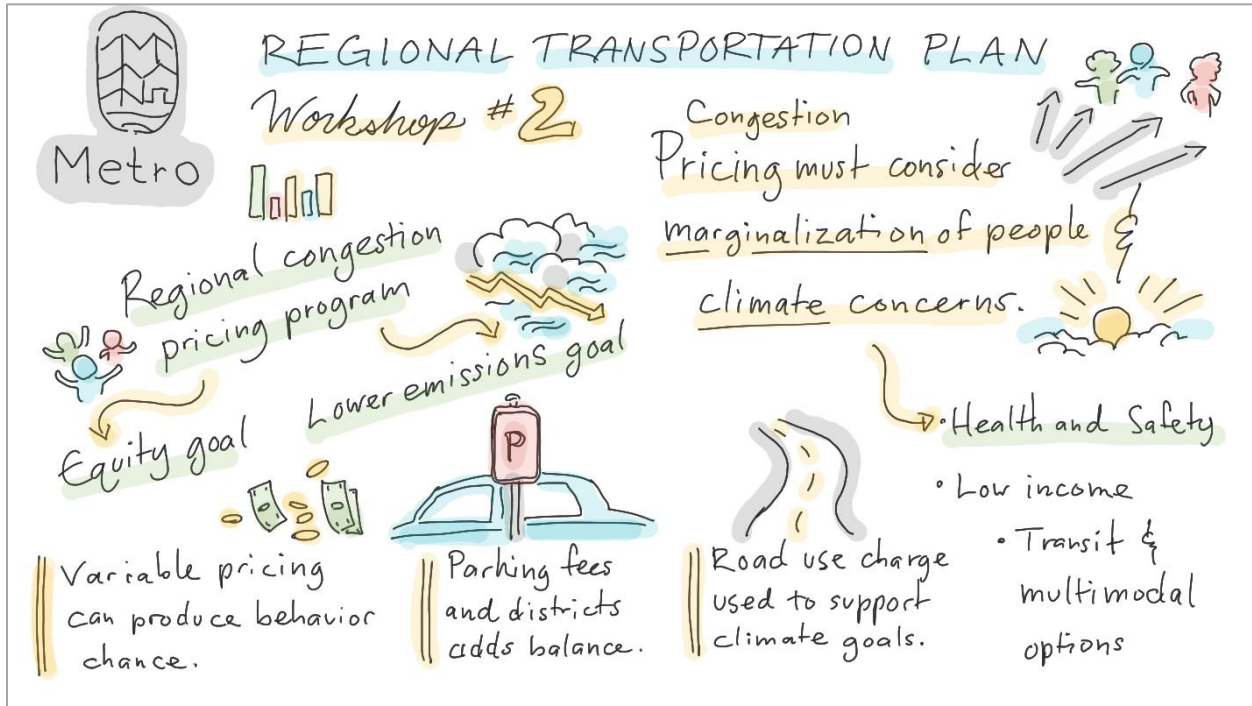
45

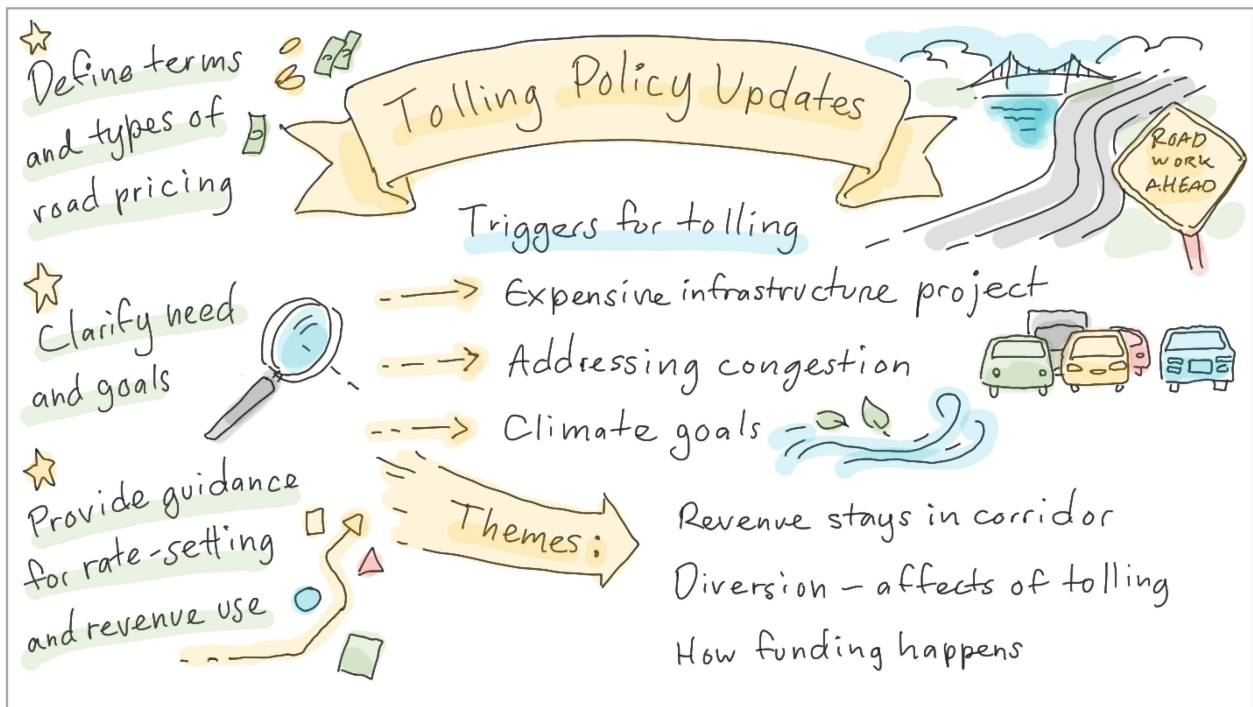
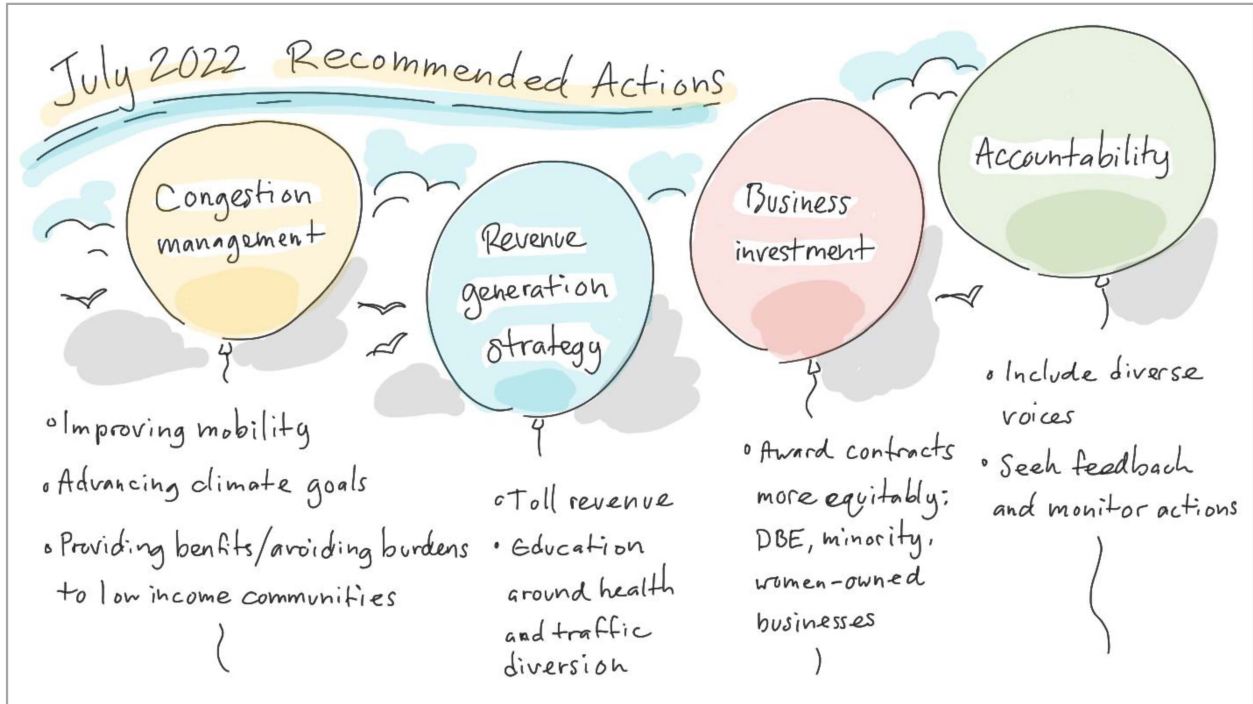
Learn more about the **Regional Transportation Plan** at:



 **Metro** | Kim Ellis, AICP
RTP Project Manager
kim.ellis@oregonmetro.gov | oregonmetro.gov/rtp

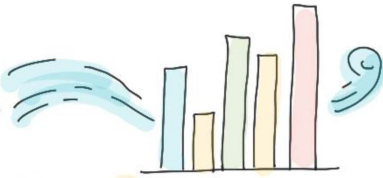
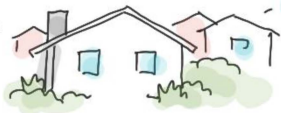
Appendix B: Visual Illustrations





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% - ↗

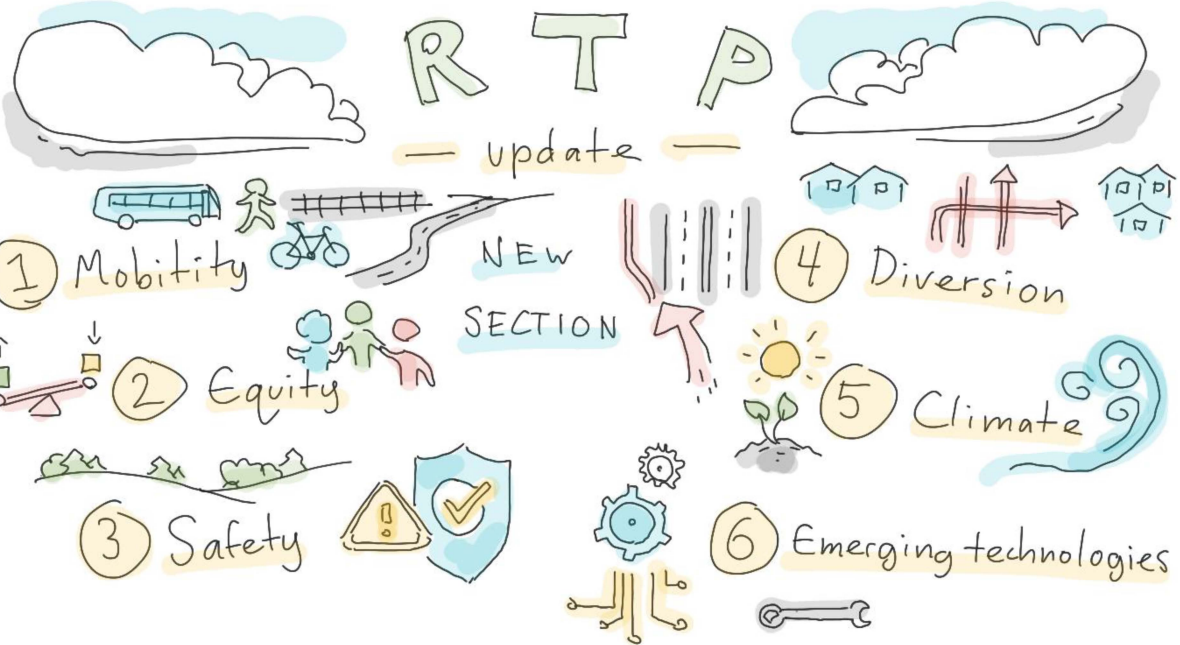
Use certification leveraging existing programs

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: <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.

- 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

July 21, 2022

2023 REGIONAL TRANSPORTATION PLAN

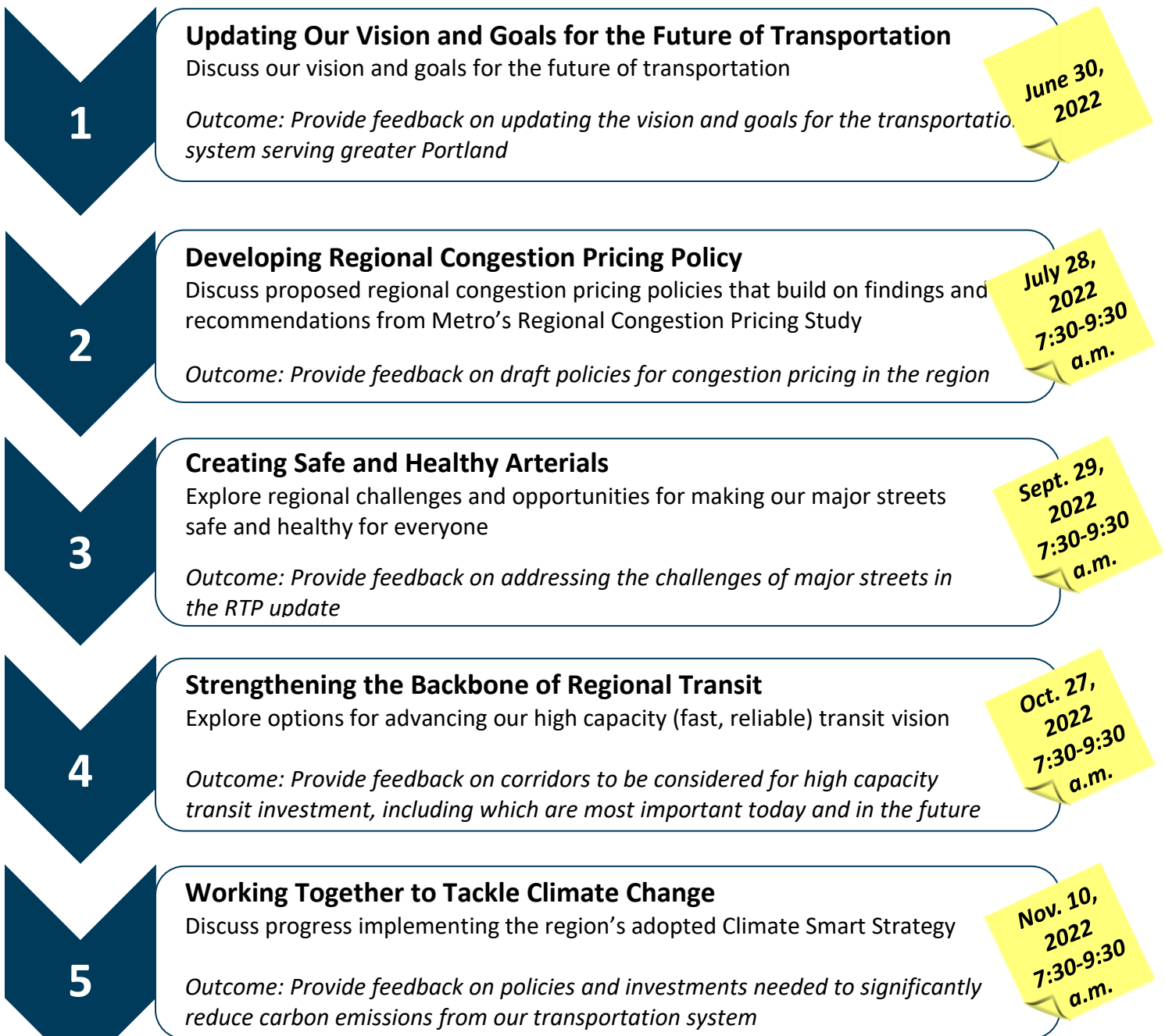
JPACT and Metro Council Workshop Series



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

Find out more about the plan update at oregonmetro.gov/rtp.



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

- 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.

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/ 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



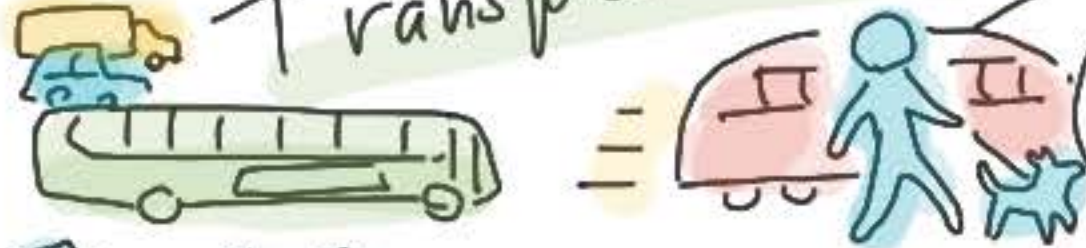
2023

JPACT & METRO COUNCIL RTP WORKSHOP

REGIONAL TRANSPORTATION PLAN WORKSHOP 1

We Have Been Asked for...

A Better Future for Transportation



SAFETY

Listen, Learn, Collaborate

CONVENIENCE

CLIMATE

EQUITY

ACHIEVE

COMMUNITY

WE WANT

RELIABILITY

SHARED PROSPERITY

WHAT

CHOICE

HEALTHY PEOPLE & ENVIRONMENT

Small Group Discussion

Metro Council + JPACT



ANTICIPATORY

A diagram showing a central point with several arrows pointing outwards in different directions, accompanied by small geometric shapes like a square, a triangle, and a circle.

SAFETY & SECURITY

Icons include a shield with a red cross, a green checkmark, and a blue checkmark.

HEALTHY ENVIRONMENT & PEOPLE

Icons include green leaves, pink flowers, and blue silhouettes of people.

VIBRANT & PROSPEROUS COMMUNITIES

Icons include a group of people in a circle and blue silhouettes of houses.

SYSTEM & CONNECTIONS
LAND USE & NETWORKS

A diagram showing a central point with three lines extending outwards, each ending in a small circle, representing a network or system.

EQUITABLE

Icons include four diverse human faces in various colors.

CLIMATE LEADERSHIP

An icon of a cloud with a lightning bolt, representing climate or energy.

TECHNOLOGY, MODERNIZATION

Icons include a wrench and a blue gear.

RELIABILITY, EFFICIENCY, FISCALLY TRANSFORMATIVE

Icons include a blue curved arrow, a yellow arrow, a red curved arrow, a green car, a red bus, and a blue person on a bicycle.

ACTIONABLE GOALS WITH MEASURABLE RESULTS

An icon of a yellow star.

Small Group Discussion

VISION STATEMENT



ACCESS

UNITY

SAFE

PROSPERITY



WORLD-CLASS

HEALTHY

LEADERSHIP

INCLUSION



QUALITY OF LIFE

REGIONAL

RELIABLE

SUPPORTIVE



CLIMATE

EQUITABLE

FUTURE

MEASURABLE

ENVIRONMENT

RESPONSIVE

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:¹

- **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.

¹ 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.²
- 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.

² 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

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.



DEFINING EQUITABLE MOBILITY

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.

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





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,¹ 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.²

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.

¹ 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.

² 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
CONGESTION & CLIMATE 	Daily vehicle miles traveled
	Drive alone rate
	Daily transit trips
	Freeway vehicle hours of delay
	Arterial vehicle hours of delay
CLIMATE 	Greenhouse gas and other emissions
EQUITY 	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	VMT B	VMT C	COR A	COR B	PARK A	PARK B	RD A	RD B
Congestion & Climate	Daily VMT								
	Drive Alone Rate								
	Daily Transit Trips								
	2HR Freeway VHD								
	2HR Arterial VHD								
Climate	Emissions								
Equity	Job Access (Auto)								
	Job Access (Transit)								
Total Regional Travel Cost		Med-High	High	Med-Low	Med-Low	Low	Low	Med	Med

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")

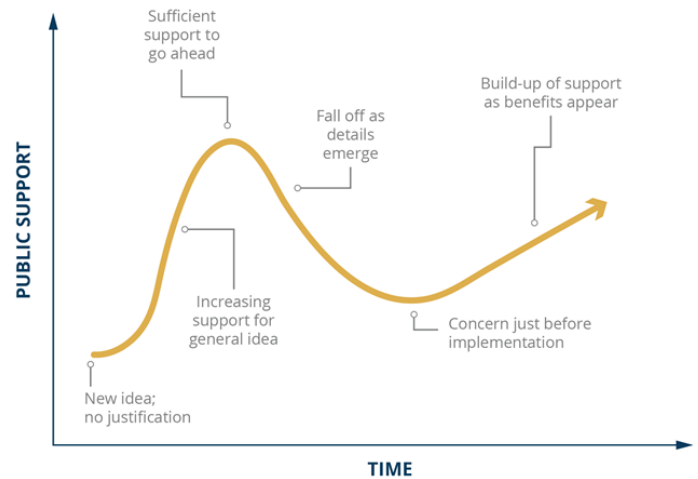
The results provided here ONLY show the effects of charging drivers under different scenarios; implementation of mitigations, discounts, or other changes to policies could result in changes to the performance of a scenario.

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

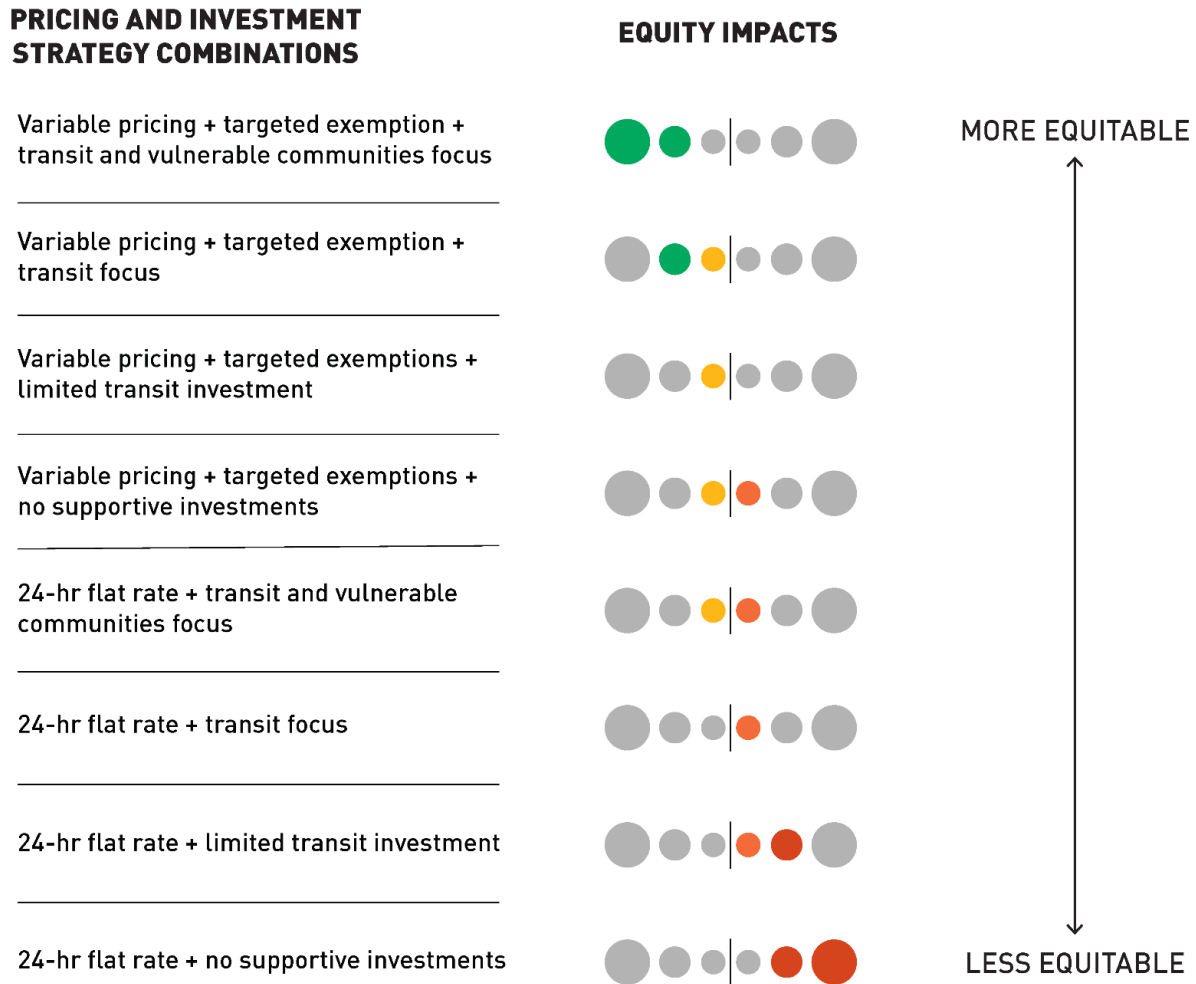


This focus favors those with more means and encourages driving. It reinforces inequity with spending focused on auto infrastructure. In addition, health impacts from high automobile reliance disproportionately harm Black, Indigenous, and People of Color (BIPOC) and low-income communities. Low-income 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.

np**GREENWAY** from the willamette to the columbia

September 14, 2022

Metro Joint Policy Advisory Committee on
Transportation (JPACT)
600 NE Grand Avenue

Portland, OR 97232

Re: Regional Flexible Funds Allocation (RFFA for 2025-2027)

Dear JPACT Members,

This letter is to express strong support for two trail projects that are part of the North Portland Greenway that have been recommended to you by TPACT and staff for funding by RFFA.

M 1: North Portland Greenway, St Johns Prairie & Smith Bybee Wetlands to Kelley Point Park Section, and

M 2: North Portland Greenway, Cathedral Park to St. Johns Prairie Section.

Our request is consistent with that of the 40 Mile Loop Land Trust. The North Portland Greenway Trail is a significant gap in the 40 Mile Loop and we are excited to see the funding for these sections successfully make it through the process and be approved for funding.

Sincerely,

Francie Royce

For npGreenway

My name is Lindsey Wise and I am a member of the Tigard Transportation Advisory Committee. I am providing written public comment for the Thursday, September 15, 2022 Joint Policy Advisory Committee on Transportation meeting.

I would like to voice my support for Resolution No. 22-5284 which allocates RFFA funding as recommended in Exhibit A of the Draft Staff Report which will support continued development of the Fanno Creek Regional Trail in the City of Tigard. The Fanno Creek trail is a regional asset which benefits Tigard and adjacent cities. It provides access to natural habitats for recreation, exercise, wildlife viewing, and getting around our City and the region via walking and biking. However there are gaps in the Fanno Creek trail leaving its full potential unmet, which this funding can help address. The more we can connect our regional trails, the more people will have access to this beautiful green space along Fanno Creek and the more utility the trail will have for transportation.

It is a great resource well worth this investment.

Thank you,
Lindsey Wise
Tigard Resident

--



September 13, 2022

Metro Joint Policy Advisory Committee on Transportation (JPACT)
600 NE Grand Avenue
Portland, OR 97232

Re: Regional Flexible Funds Allocation (RFFA) for 2025-2027

Dear JPACT 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 plan and develop Metro's Regional Trail System.

We fully support the list of trail projects included in the staff and TPAC 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 and by TPAC 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.

For this round of funding, Metro initiated a new process that considered applications for two funding sources at the same time. Metro staff did a commendable job of considering which projects were a good fit for RFFA while taking into account the one-time nature of Metro bond funding. The TPAC 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. Any reduction made by shifting trail projects from RFFA to bond funding will be viewed as "backfilling" and an affront to voters who supported trail projects through the 2019 Metro bond. It would also mean that a project on the 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.

Please honor the processes that have led us to this point and support the list of recommended projects for RFFA funding as endorsed by TPAC on September 2nd.

Sincerely,

Lou Reynoldson, President
40 Mile Loop Land Trust

c: Metro Council

40-Mile Loop Land Trust
P.O. Box 9172
Portland, OR 97207-0262
www.40mileloop.org

My name is Michael Hendrickson and I am a member of the Tigard Transportation Advisory Committee. I am providing written public comment for the Thursday, September 15, 2022 Joint Policy Advisory Committee on Transportation meeting. I would like to voice my support for Resolution No. 22-5284 which allocates RFFA funding as recommended in Exhibit A of the Draft Staff Report which will support continued development of the Fanno Creek Regional Trail in the City of Tigard. The Fanno Creek trail is a regional asset which benefits Tigard and adjacent cities. I live next to the Fanno Creek trail and I see the benefit it gives my family and others the ability to access nature and also provides a safe way for my family to bike/walk to access parks without being adjacent to traffic. Allocating funding for the Fanno Creek Regional Trail will provide access for more households to be in nature, recreate, safely connect communities, and enjoy what I enjoy, living next to the Fanno Creek Regional Trail.

Thank you,

Michael Hendrickson

My name is Shawne Martinez and I am a member of the Tigard Transportation Advisory Committee. I am providing written public comment for the Thursday, September 15, 2022 Joint Policy Advisory Committee on Transportation meeting. I would like to voice my support for Resolution No. 22-5284 which allocates RFFA funding as recommended in Exhibit A of the Draft Staff Report which will support continued development of the Fanno Creek Regional Trail in the City of Tigard. The Fanno Creek trail is a regional asset which benefits Tigard and adjacent cities.

The Fanno Creek Trail connects Southwest Portland (Garden home area) to Cook Park in Tigard which then connects across the Tualatin River into Tualatin. Once completed this regional Multi-use path will have the capacity to eliminate hundreds (if not thousands) of single occupancy vehicle trips daily. More work is needed, please help fund this project.

Shawne Martinez
TTAC

August traffic death report for Clackamas, Multnomah and Washington counties *

**ODOT preliminary fatal crash report as of 9/1/22, police and news reports*

Lynn Proctor, 75, walking, Hwy 26 near E. Sylvan Drive, Clackamas, 9/7

Legi Vargas, 31, motorcycling, OR 211 Eagle Creek-Sandy Hwy, Clackamas, 9/1

Unidentified person, walking, N MLK Blvd & N Marine Dr., Portland, Multnomah, 8/30

Unidentified person, motorcycling, N Expo Rd at Expo Transit Center, Portland, Multnomah, 8/30

Ashlee Diane McGill, 26, walking, SE Stark St & SE 133rd Ave, Portland, Multnomah, 8/27

Robert Dean Miller, 60, motorcycling, US 26 Mt Hood Hwy, Clackamas, 8/26

Jonathan Alexander Rojas, 39, driving, Zion Church Rd & NW Gordon, Washington, 8/25

Jeremy Thomas Hofmann, 49, walking, OR 99E Pacific Hwy, Canby, Clackamas, 8/25

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





Metro

2025-2027 Regional Flexible Funds: Consideration of TPAC Step 2 recommendation to JPACT

Presentation to JPACT

September 15, 2022

Purpose

- Present and discuss TPAC recommendation
- **ACTION REQUESTED** to approve 2025-2027 RFFA Step 2 funding package and refer to Metro Council for adoption

TPAC Step 2 recommendation

- Based on Example 2 from August discussions
- Focus on Equity and Safety outcomes
- Invests throughout the region; top 2 priority projects from Portland and counties
- 10 projects in total

TPAC recommendation includes:

- 162nd Ave: \$7.58M
- 148th Ave: \$7.1M
- I-205 MUP: \$1.1M
- Council Creek Trail: \$5.5M
- 57th 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 trails recommendation

- Project selection coordinated with RFFA
- Staff recommendation is consistent with JPACT input
- 12 projects funded, totaling nearly \$20 million

Resolution 22-5284

- Step 1: \$105,400,186 (investments previously identified in RFFA Program Direction, IJA funding memo)
- Step 2: \$47,445,855
- **Total 2025-2027 RFFA: \$152,846,041**

Request for JPACT action

- Staff requests action to approve Resolution 22-5284



Metro

Thank you!

oregonmetro.gov/RFFA

daniel.kaempff@oregonmetro.gov

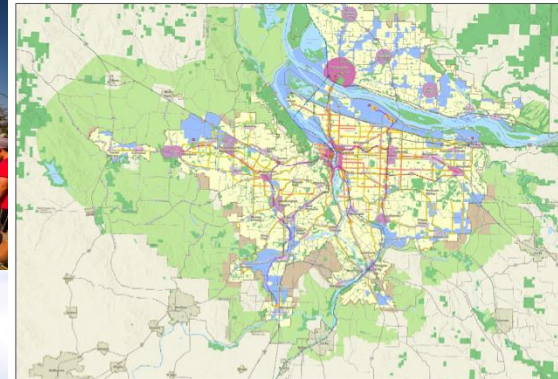
robert.spurlock@oregonmetro.gov

2023 Regional Transportation Plan

Shaping our shared vision and goals for the future of transportation

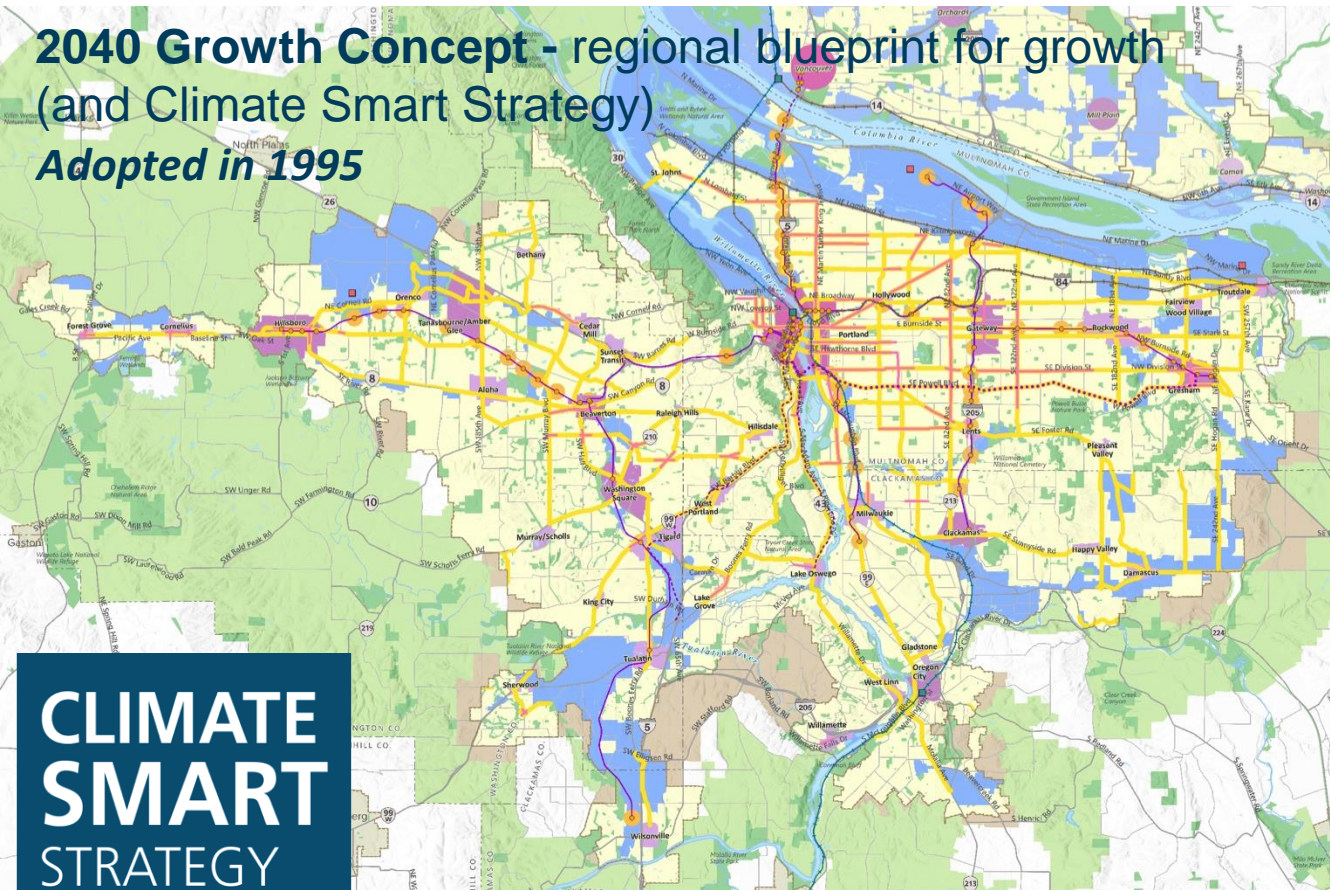
JPACT

September 15, 2022



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

JPACT/Metro Council Workshop – June 30



Thank you for your input!

Workshop themes

Describe a vision for the region that will resonate with the people it serves.

Provide more focus by reducing number of goals to five actionable goals.

The vision and goals should tie to actions and measurable outcomes.

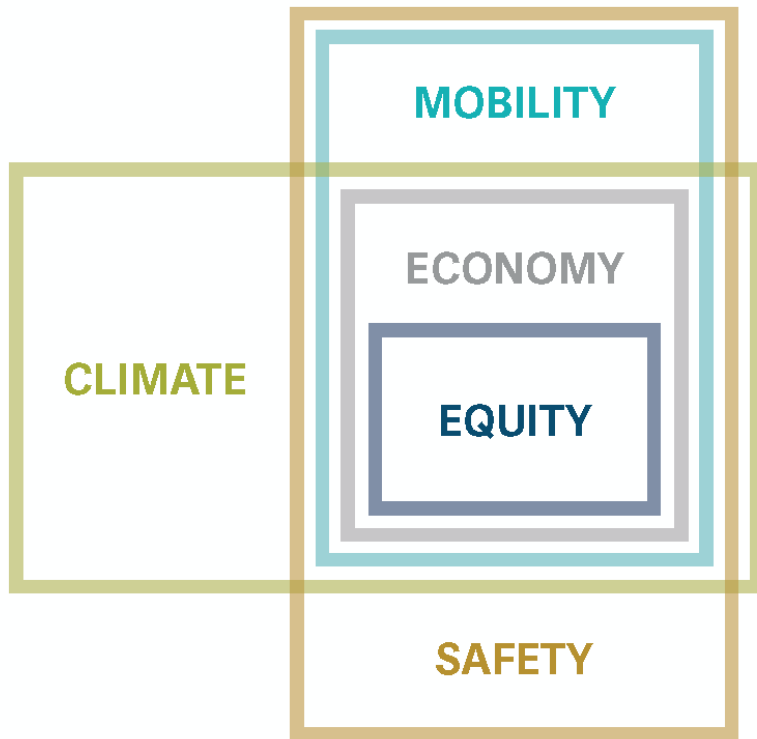
Incorporate climate action more thoroughly into the vision and goals.

Incorporate safety and security as the main priorities.

The RTP needs to be forward thinking. It's a vision we express to our constituents and the world.

The region is growing economically, strive to create complete communities and connected transportation networks.

Draft Vision and Goals for 2023 RTP



Vision →

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

Equity Goal

Equitable Transportation

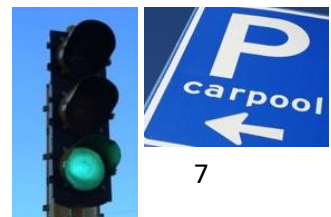
Transportation system disparities experienced by Black, Indigenous and other people of color and people with low income, are eliminated. The disproportionate barriers people of color, people with low income, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.



Climate Goal

Climate Action and Resilience

People, communities and ecosystems are healthier and more resilient and carbon emissions and other pollution are reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.

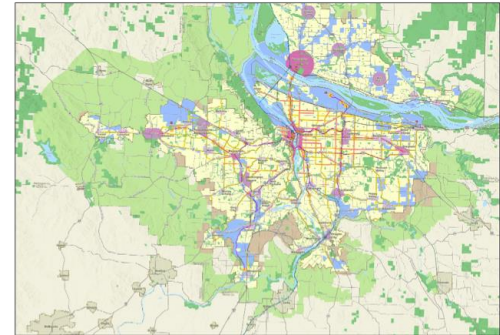


**CLIMATE
SMART
STRATEGY**
Adopted in 2014

Economy Goal

Vibrant and Prosperous Communities

Greater Portland's centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities and businesses thrive and prosper.



Safety Goal

Safe System

Deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.



Mobility Goal

Mobility Options

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



Discussion and feedback

- Do the draft vision and goals reflect JPACT priorities and input to date?
- Anything important missing?
- Suggestions for ways to improve them?
- Does JPACT support the draft vision and goals?

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



Metro

Kim Ellis, AICP

RTP Project Manager

kim.ellis@oregonmetro.gov

Molly Cooney-Mesker

RTP Engagement Specialist

molly.cooney-mesker@oregonmetro.gov

oregonmetro.gov/rtp



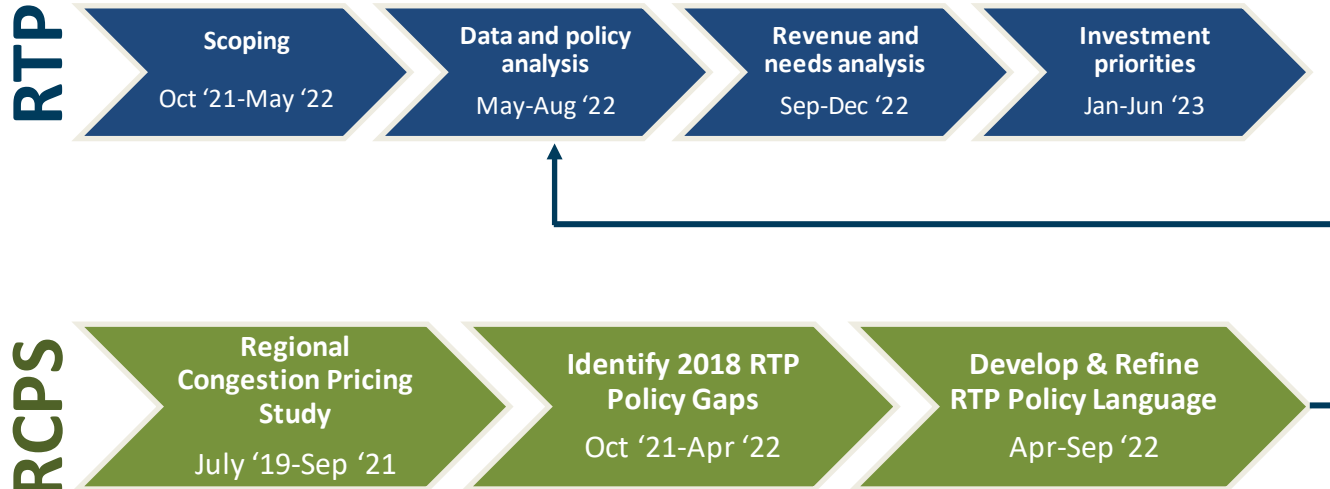
Metro

RTP Pricing Policy Development

JPACT

September 15, 2022

2023 RTP Update Schedule

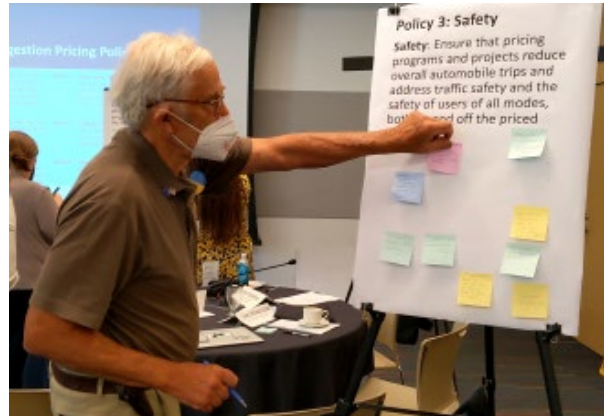


We are here: Sharing revised draft 2023 RTP policy language with JPACT

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
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

JPACT/Metro Council Workshop – July 28



**Thank you for
your input!**

What We Heard from JPACT and Council

- Focus on equity and climate resiliency
- Use tolling revenues to improve mobility
- Develop policies that benefit historically marginalized communities
- Low-Income tolling program is essential
- Diversion should include all trip distances

Revised Draft RTP 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 **Diversion:** 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.

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

Diversion: 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.

Continuing Work on RTP Policies

- 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.
- Continue coordination with OHP amendment

What We Heard from TPAC – 9/2/22

- Address use of revenue for road/seismic improvements, operations and maintenance
- Concern about changes to Motor Vehicle Network Policy 12
- Future work needed on how to regionally coordinate pricing

Next Steps – RTP Update

- 9/21 – MTAC
- 9/28 - MPAC
- 10/28 - Written feedback from TPAC
- November-December – Staff updates policies and incorporate in RTP chapter updates
- Late winter / early spring – Chapter updates brought to TPAC/JPACT/Council

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





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

September 12, 2022

Robert Van Brocklin, Chair
Oregon Transportation Commission
355 Capitol Street, NE
Salem, Oregon 97301

Subject: JPACT comments on OHP tolling amendment

Dear Chair Van Brocklin and Members of the Oregon Transportation Commission:

The purpose of this letter is to summarize concerns elevated by members of the Joint Policy Committee on Transportation (JPACT), thematically and specifically, regarding the proposed toll policy amendment to the Oregon Highway Plan (OHP) as originally published on June 13, 2022. We understand that you have already been working to address concerns raised in a revised draft shared with OTC on September 7, 2022, but some of our region's concerns remain unaddressed, and we hope to continue working with you on the issues outlined below before the OTC adopts the final amendment.

This amendment, in conjunction with updates to pricing policy for the 2023 Regional Transportation Plan (RTP), will serve as foundational guidance for tolling and congestion pricing projects in the Portland metropolitan region, impacting our shared constituencies. Members of JPACT have concerns, described below in detail, regarding the role of local and regional partners in the development and implementation of pricing, allocation of tolling revenue, definitions of projects and corridors, and language around diversion.

It is critical that we get this right. A successful tolling program has the power to change for the better how our communities grow, how people get around, and what impact we have on our climate's future. We want to chart that course collaboratively.

Local and Regional Partnership

While the OTC is considering a statewide OHP Amendment, this policy will primarily impact people living within the Portland Metro area. With the I-205 Toll Project, Regional Mobility Pricing Project, and I-5 Bridge Replacement project all advancing, the policies in this amendment will have a nearly immediate impact on the Portland region. While we have appreciated ODOT's commitment to introduce a new Regional Tolling Advisory Committee (RTAC) and to involve regional partner staff through briefings at TPAC and in other forums, the proposed amendment includes insufficient language on the importance of coordination with local and regional partners.

The interstate system is intertwined with the local roadway system, and when tolling and congestion pricing is implemented the local systems will be impacted. The average person does not distinguish ownership when making a trip. We know from modeling done as part of the Regional Congestion Pricing Study (RCPS) that if the Interstate is tolled, some level of diversion will occur onto local streets. The proposed OHP amendment should codify collaboration with local and regional partners at all stages of development and implementation of a pricing program or project, to ensure

that those communities have a chance to jointly manage impacts and benefits of a pricing program or project.

Community voices and expertise can also help ODOT to develop and implement pricing in a way that is most beneficial, and least harmful, to those communities while supporting regional and statewide needs. The OHP amendment language should be revised to include the commitments that ODOT has made to elevate the role of local policymakers and stakeholders, and to address the input from ODOT's Equity and Mobility Advisor Committee (EMAC) on the need to engage local partners at all levels and stages of the process.

Allocation of Tolling Revenue:

The proposed OHP amendment language does not provide clear guidance on allocation of revenues collected through pricing. First, the policy should recognize the dual purpose of tolling: to both raise revenue and manage demand. With this dual purpose, tolls may be increased or decreased based on the demand; that should be recognized from the outset.

Second, the proposed draft amendment must address the need to manage the transportation system to advance state and regional goals, including managing diversion and addressing impacts up front as part of the project. HB 3055 identified that tolling revenue may be used for multi-modal improvements that are on adjacent, connected, or parallel roadways to the tolled roadways. The revenue section of the OHP amendment should recognize this up front. The tolling "project" should be defined broadly in geography and scope to include local networks that will be impacted by diversion, and to explicitly allow for transit and multi-modal investments that help address the impacts caused by tolling. Investing revenues in transit and multi-modal improvements as part of the project will allow ODOT and partners to holistically manage the system and relieve congestion to improve equity and climate outcomes.

Definition of a Project and Corridor:

Related to the above point, it is unclear as the policy is currently written what potential project elements would be eligible for inclusion in an infrastructure improvement project. A primary use of the revenue in the June 13, 2022 draft amendment is to "(r)each the desired share of revenue needed to pay for the infrastructure improvement, direct project mitigation, operations, and maintenance." Only after using revenue for that purpose does the policy direct funds be "targeted to manage congestion to desired travel times, speeds, or reliability thresholds established for the project" or to "(m)eet any additional system performance metrics, defined for corridors, a series of corridors or by segments."

While the language around "congestion pricing" projects has been clarified and improved in the September 7, 2022 revised draft, and we are pleased that the project definition in Policy 6.8 allows that multimodal investments may be included in a project, we are still concerned that the "tolling" and "combination" projects place too much emphasis on revenue generation and not enough on managing congestion. The revised draft does identify multimodal investments as an optional part of a project, but does not include strong enough language to ensure that congestion management investments will be included as part of the project. The project definition should be further revised to emphasize the importance of ensuring that congestion management, including multimodal investments, should be included by default in a project, so that these important goals are ensured of the necessary funding to achieve them. . The amendment should call out that local and regional

partners must be engaged in the development of the tolling or congestion pricing project to ensure that these important elements are included in the project.

The September 7, 2022 revised draft OHP amendment also proposes in Policy 6.11 to use revenues “on the tollway, adjacent connected and parallel highways,” which is an improvement on language in the June 13, 2022 draft and better reflects HB 3055. However, the corridor is then narrowly defined in Policy 6.8 as:

“The immediate area of impact adjacent to the project, generally within 1 mile of the priced facility or as defined through the project-specific analysis as significant impacts. Additionally, the corridor is limited to facilities that generally move traffic in the same direction.”

This definition is unnecessarily restrictive and could artificially limit ODOT and partners as they work collaboratively throughout a pricing project to identify a corridor and potential improvements. In addition, the definition in Policy 6.8 artificially narrows the language used in Policy 6.11. Instead, we would propose that ODOT use a broader definition of a corridor in Policy 6.8, such as that included in the 2018 Regional Transportation Plan¹, or as identified through the NEPA process (whichever is broader), to allow individual pricing projects the flexibility to determine an appropriate corridor definition reflective of its unique context.

Diversion:

The amendment as currently written fails to address the full impacts of diversion to local roads. In particular, excluding short-distance trips from being considered as diversion appears to be inconsistent with commitments made through previous regional conversations around diversion, including commitments made by ODOT as part of the I-205 toll project’s 2018 RTP amendment.

While there is agreement with the need for pricing projects to address the diversion impacts that they cause, there is concern with the attempts in this policy to differentiate the types of trips that may change routes due to pricing (i.e. short trips, long trips, freight), and the assertion that short trips moving from the priced facility to the local street network should not be considered diversion, and should therefore not be a priority to address or mitigate. There may be a legitimate interest in discouraging the use of the region’s freeways for short-distance trips that may be better served on the local street network, but those trips do occur on the freeways today. Any project or policy that leads to those trips moving off the freeway and onto the local street network is creating a new impact on that local network, potentially leading to greater traffic volumes, congestion, transit delay, localized pollution, and safety issues. Those impacts, should they meet established thresholds, need to be addressed as part of the project. For the OHP amendment to adequately direct toll projects to address diversion, the amendment should define diversion as in the 2023 RTP pricing policy work:

- *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.*

¹ The 2018 RTP defined a corridor as “A broad geographical band that follows a general directional flow connecting major sources of trips that may contain a number of streets, highways, freight, active transportation and transit route alignments.” More information on the 2018 RTP’s approach to corridors can be found in Section 3.4 in Chapter 3 of the 2018 RTP and at <https://www.oregonmetro.gov/mobility-corridors-atlas>

Finally, the OHP amendment needs to make clear how diversion impacts can be addressed as part of the project and monitored throughout tolling, including more clearly identifying the process for engaging local impacted jurisdictions and communities as well as the types of investments that could be considered to address those impacts.

We look forward to continuing working with ODOT and the OTC to develop a final draft of this policy that will benefit our region and the state.

Sincerely,

Shirley Craddick
Metro Councilor District 1
JPACT Chair

cc: Metro Councilors

DRAFT