

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 6th day of October 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

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

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
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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:		1	Fiscal Constraint Cat:	SM&O	MTIP ID:	NEW-TBD
OR8: East Lane (Cornelius)			ODOT Type	Safety	Status:	2
			Performance Meas:	Safety	Comp Date:	12/31/2027
Project Status:			Capacity Enhancing:	No	RTP ID:	12095
2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)			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
			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

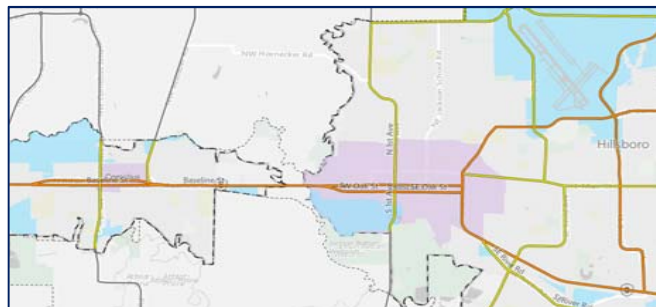
Fund Type Codes References

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	US30BY curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06	\$8,333,068.06
22603	1	I-405 Fremont bridge (Millamette River) West ramps	var	var		PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00	\$11,759,000.00
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00
22622	2	Portland Metro and surrounding area safety reserve	var	var		CN	Safety	Volunteer Safety	\$0.00	\$2,500,000.00	\$2,500,000.00
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00
							Fish Passage				
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00
							Modernization				

Fund Codes

Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	ACPO	ADVANCE CONSTRUCT PR		100.00%	212,000.00	90.00%	190,800.00	10.00%	21,200.00	0.00%	0.00
	PE Totals				100.00%	212,000.00		190,800.00		21,200.00	
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	
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:		2	Fiscal Constraint Cat:	SM&O	MTIP ID:	NEW-TBD
Portland Metro and Surrounding Areas Safety Reserve			ODOT Type	Safety	Status:	0
			Performance Meas:	Safety	Comp Date:	12/31/2027
Project Status:			Capacity Enhancing:	No	RTP ID:	12095
0 = No activity.			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
Short Description:			Flex Transfer to FTA:	No	Council Appr:	Yes
Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.			FTA Conversion Code:	N/A	Council Date:	10/6/2022
			1st Year Program'd:	2023	OTC Approval:	Yes
			Years Active:	0	OTC Date	7/14/2022
			STIP Amend #: 21-24-2144		MTIP Amnd #: SP23-01-SEP	

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

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

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
AC-STBGS	ACP0	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:		3	Fiscal Constraint Cat:	Capital		MTIP ID:	NEW-TBD
Broadway Bridge Deck Replacement			ODOT Type	Bridge		Status:	4
			Performance Meas:	Bridge		Comp Date:	12/31/2024
			Capacity Enhancing:	No		RTP ID:	11902
Project Status:			Conformity Exempt:	Yes		CMP:	Yes
4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).			30 Day Notice Begin:	8/30/2022		TCM:	No
			30 Day Notice End:	9/28/2022		TSMO Award	No
			Funding Source	ODOT/Local		TSMO Cycle	N/A
			Funding Type:	Bridge/IIJA		RFFA ID:	N/A
			State Highway Route	N/A		RFFA Cycle:	N/A
			Mile Post Begin:	N/A		UPWP:	Yes
			Mile Post End:	N/A		UPWP Cycle:	SFY 2025
			Length:	N/A		Past Amend:	0
			Flex Transfer to FTA	No		Council Appr:	Yes
			FTA Conversion Code:	N/A		Council Date:	10/6/2022
			1st Year Program'd:	2023		OTC Approval:	No
			Years Active:	0	OTC Date	N/A	
			STIP Amend #: 21-24-2342		MTIP Amnd #: SP23-01-SEP		

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

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

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
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	
Total Funds Obligated:		\$ 2,007,000				Federal Aid ID
Federal Funds Obligated:		\$ -				
Initial Obligation Date:		Not Available				Other Notes PE phase completed with local funds by the agency under IGA #73000-00003551
EA Number:		Not assigned				
EA Start Date:		N/A				
EA End Date:		N/A				
Known Expenditures:		N/A				

MTIP Programming Consistency Check Details and Glossary

General Areas

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

Fiscal Constraint Consistency Check Areas

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

RTP Consistency Check Areas

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

UPWP Consistency Check Areas

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

Other Review Areas

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

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

LABSC Meeting Minutes 04/04/2022

Big Bridge Funding

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

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

102.0% Allocation

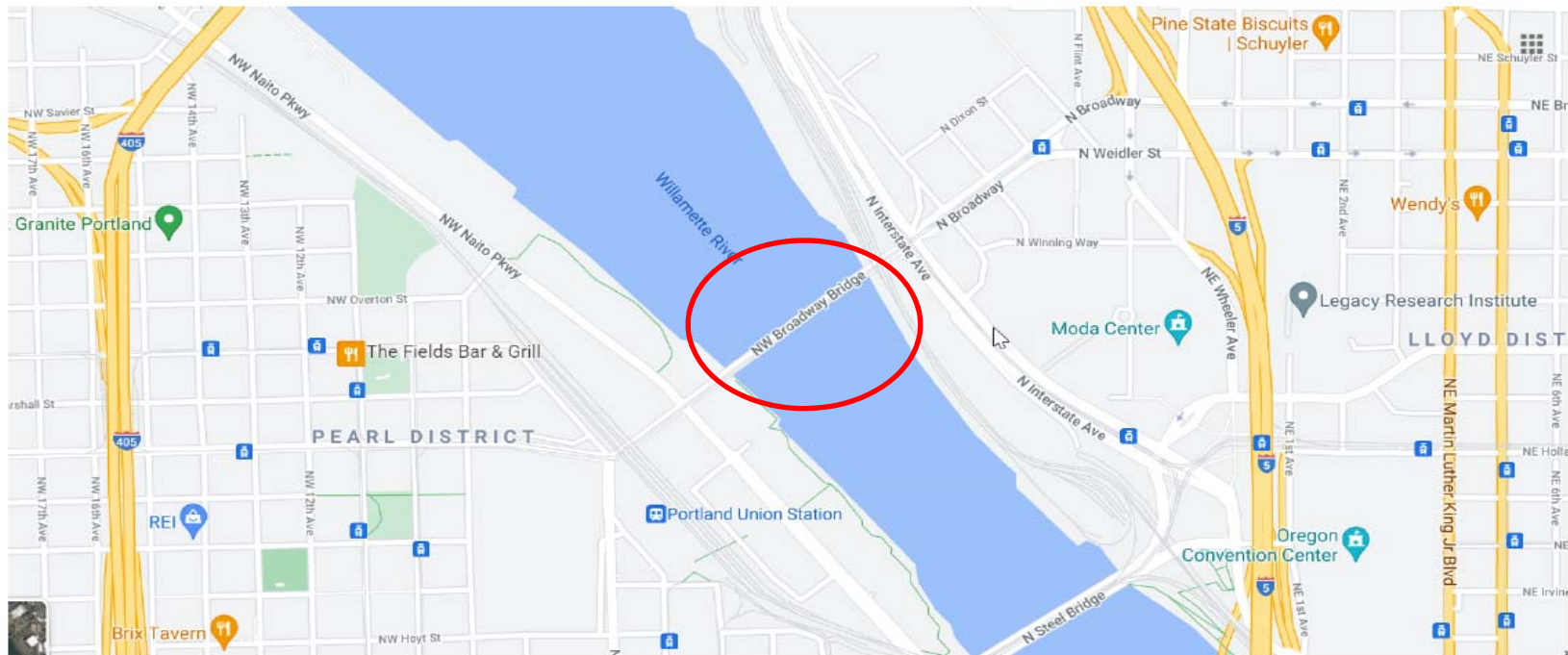
Large Rehab		\$31,024,910 Allocated (\$625,090) Remaining											
Bridge	Agency	Type	On-Off	Region	SRF	TBF	LDF	UBF	saf (sole	nfs (near	hut (high	tmt	tmt
05789A	Marion County	Rehab	On - Big	2	34.00	0.00	0.00	23.01	1.00	1.00	1.00	3027	1.30
40056	City of Eugene	Rehab	On - Big	2	10.40	0.00	0.00	24.80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

\$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
Short Description: Maintenance and Bus Fleet Replacement and Software			Conformity Exempt:	Yes	CMP:	No
			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	FTA	TSMO Cycle	N/A
			Funding Type:	5307	RFFA ID:	N/A
			State Highway Route	N/A	RFFA Cycle:	N/A
			Mile Post Begin:	NA	UPWP:	No
			Mile Post End:	N/A	UPWP Cycle:	N/A
			Length:	N/A	Past Amend:	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
being 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
		Performance Meas: Transit	Comp Date: N/A
Project Status: Canceled		Capacity Enhancing: No	RTP ID: 12097
		Conformity Exempt: Yes	CMP: No
		30 Day Notice Begin: 8/30/2022	TCM: No
		30 Day Notice End: 9/28/2022	TSMO Award: No
		Funding Source: FTA	TSMO Cycle: N/A
		Funding Type: 5310	RFFA ID: N/A
		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
Short Description: Services and Facility Improvements for Elderly and Disabled Customers		Flex Transfer to FTA: No	Council Appr: Yes
		FTA Conversion Code: N/A	Council Date: 10/6/2022
		1st Year Program'd: 2022	OTC Approval: No
		Years Active: 1	OTC Date: N/A
		STIP Amend #: TBD	MTIP Amnd #: SP23-01-SEP

Detailed Description: None

*** CANCELED PROJECT ***

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

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

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
Federal Funds								
5310	F160	2023	-				\$ 41,000	\$ -
								\$ -
								\$ -
							Federal Totals:	\$ -
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2023	-				\$ 10,250	\$ -
								\$ -
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
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	
		Performance Meas: Transit	Comp Date: 12/31/2025	
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing: No	RTP ID: 12097	
		Conformity Exempt: Yes	CMP: No	
		30 Day Notice Begin: 8/30/2022	TCM: No	
		30 Day Notice End: 9/28/2022	TSMO Award No	
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		Funding Source FTA	TSMO Cycle N/A	
		Funding Type: 5339	RFFA ID: N/A	
		State Highway Route N/A	RFFA Cycle: N/A	
		Mile Post Begin: NA	UPWP: No	
		Mile Post End: N/A	UPWP Cycle: N/A	
		Length: N/A	Past Amend: 1	
		Flex Transfer to FTA No	Council Appr: Yes	
		FTA Conversion Code: N/A	Council Date: 10/6/2022	
		1st Year Program'd: 2022	OTC Approval: No	
		Years Active: 1	OTC Date N/A	
		STIP Amend #: TBD		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
		SMART Bus and Bus Facilities							

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

Re: Split Letter for FFY2022 Apportionment funding

Dear Ms. Gehrke:

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

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

Agency	Section 5307	Section 5337 HIFG	Section 5337 HIMB	Section 5339	Section 5310	Total FFY2022 Formula Funds
TriMet	51,930,404 *	38,199,581	24,177	3,048,873	1,961,709 *	95,164,744
SMART	576,323 *	0	0	48,763	0 *	625,086
C-TRAN	7,201,228	0	164,470	618,915	545,101	8,529,714
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
Short Description: Maintenance and Bus Fleet Replacement and Software		Mile Post Begin: NA		UPWP: No
		Mile Post End: N/A		UPWP Cycle: N/A
		Length: N/A		Past Amend: 1
		Flex Transfer to FTA: No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 10/6/2022
		1st Year Program'd: 2022		OTC Approval: No
		Years Active: 1		OTC Date: N/A
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP

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

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

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

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
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:		8	Fiscal Constraint Cat:	SM&O	MTIP ID:	71135
SMART Senior and Disabled Program (2023)			ODOT Type	Transit	Status:	T22
			Performance Meas:	Transit	Comp Date:	12/31/2025
Project Status:			Capacity Enhancing:	No	RTP ID:	12097
T22 = Programming actions in progress or programmed in current MTIP			Conformity Exempt:	Yes	CMP:	No
			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	FTA	TSMO Cycle	N/A
			Funding Type:	5310	RFFA ID:	N/A
Short Description:			State Highway Route	N/A	RFFA Cycle:	N/A
Existing: Services and Facility Improvements for Elderly and Disabled Customers			Mile Post Begin:	NA	UPWP:	No
Replace with ---> Provides overall ADA & para-transit services to improve			Mile Post End:	N/A	UPWP Cycle:	N/A
Enhanced Mobility of Seniors and Individuals with Disabilities with a focus on			Length:	N/A	Past Amend:	0
travel training for seniors and people with disabilities in Wilsonville.			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
		Performance Meas: Transit		Comp Date: 12/31/2025
Project Status: T22 = Programming actions in progress or programmed in current MTIP		Capacity Enhancing: No		RTP ID: 12097
		Conformity Exempt: Yes		CMP: No
		30 Day Notice Begin: 8/30/2022		TCM: No
		30 Day Notice End: 9/28/2022		TSMO Award No
		Funding Source FTA		TSMO Cycle N/A
Short Description: 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		Funding Type: 5339		RFFA ID: N/A
		State Highway Route N/A		RFFA Cycle: N/A
		Mile Post Begin: NA		UPWP: No
		Mile Post End: N/A		UPWP Cycle: N/A
		Length: N/A		Past Amend: 1
		Flex Transfer to FTA No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 10/6/2022
		1st Year Program'd: 2022		OTC Approval: No
		Years Active: 1		OTC Date N/A
		STIP Amend #: TBD		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:	10	Fiscal Constraint Cat:	Capital	MTIP ID:	71145
SMART Bus Purchase/PM/ Amenities and Technology 2023		ODOT Type	Transit	Status:	T22
		Performance Meas:	Transit	Comp Date:	12/31/2025
		Capacity Enhancing:	No	RTP ID:	12097
Project Status:		Conformity Exempt:	Yes	CMP:	No
T22 = Programming actions in progress or programmed in current MTIP		30 Day Notice Begin:	8/30/2022	TCM:	No
		30 Day Notice End:	9/28/2022	TSMO Award	No
		Funding Source	FTA	TSMO Cycle	N/A
		Funding Type:	5307	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	N/A
		Mile Post Begin:	NA	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
		Length:	N/A	Past Amend:	1
Short Description:		Flex Transfer to FTA	No	Council Appr:	Yes
Maintenance and Bus Fleet Replacement and Software		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:		11	Fiscal Constraint Cat:	SM&O	MTIP ID:	71136
SMART Senior and Disabled Program (2024)			ODOT Type	Transit	Status:	T22
			Performance Meas:	Transit	Comp Date:	12/31/2026
			Capacity Enhancing:	No	RTP ID:	12097
Project Status:			Conformity Exempt:	Yes	CMP:	No
T22 = Programming actions in progress or programmed in current MTIP			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	FTA	TSMO Cycle	N/A
			Funding Type:	5310	RFFA ID:	N/A
			State Highway Route	N/A	RFFA Cycle:	N/A
			Mile Post Begin:	NA	UPWP:	No
			Mile Post End:	N/A	UPWP Cycle:	N/A
			Length:	N/A	Past Amend:	0
			Flex Transfer to FTA	No	Council Appr:	Yes
			FTA Conversion Code:	N/A	Council Date:	10/6/2022
			1st Year Program'd:	2024	OTC Approval:	No
			Years Active:	0	OTC Date	N/A
			STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

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

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

Last Amendment of Modification: None. First amendment to MTIP

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
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
Short Description: Maintenance and Bus Fleet Replacement and Software		Mile Post Begin: NA		UPWP: No
		Mile Post End: N/A		UPWP Cycle: N/A
		Length: N/A		Past Amend: 0
		Flex Transfer to FTA: No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 10/6/2022
		1st Year Program'd: 2024		OTC Approval: No
		Years Active: 0		OTC Date: N/A
		STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP

Detailed Description: 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:		13	Fiscal Constraint Cat:	Capital	MTIP ID:	71103
Transit Oriented Development (TOD) program (FFY 2023)			ODOT Type	Transit	Status:	T22
Preventive Maintenance Support (FFY 2023)			Performance Meas:	Transit	Comp Date:	12/31/2024
			Capacity Enhancing:	No	RTP ID:	11335
Project Status:			Conformity Exempt:	Yes	CMP:	No
T22 = Programming actions in progress or programmed in current MTIP			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	Metro	TSMO Cycle	N/A
			Funding Type:	STBG	RFFA ID:	50392
			State Highway Route	N/A	RFFA Cycle:	2022-24
Short Description:			Mile Post Begin:	NA	UPWP:	No
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)			Mile Post End:	N/A	UPWP Cycle:	N/A
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:		14	Fiscal Constraint Cat:	Maint	MTIP ID:	71210
TriMet Bus and Rail Preventive Maintenance (2023)			ODOT Type	TR-Cap	Status:	T22
			Performance Meas:	Transit	Comp Date:	12/31/2025
Project Status:			Capacity Enhancing:	No	RTP ID:	11335
T22 = Programming actions in progress or programmed in current MTIP			Conformity Exempt:	Yes	CMP:	No
			30 Day Notice Begin:	8/30/2022	TCM:	No
			30 Day Notice End:	9/28/2022	TSMO Award	No
			Funding Source	FTA	TSMO Cycle	N/A
			Funding Type:	5337	RFFA ID:	N/A
			State Highway Route	N/A	RFFA Cycle:	N/A
			Mile Post Begin:	NA	UPWP:	No
			Mile Post End:	N/A	UPWP Cycle:	N/A
			Length:	N/A	Past Amend:	0
Short Description:			Flex Transfer to FTA	No	Council Appr:	Yes
Capital Maintenance For Bus And Rail to ensure continued service			FTA Conversion Code:	N/A	Council Date:	10/6/2022
			1st Year Program'd:	2023	OTC Approval:	No
			Years Active:	0	OTC Date	N/A
			STIP Amend #: TBD		MTIP Amnd #: SP23-01-SEP	

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

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

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

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (Transit)	Total
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:			Fiscal Constraint Cat:	Other		MTIP ID:	71213
Enhanced Seniors Mobility/Individuals w/Disabilities (2023)		15	ODOT Type	Transit		Status:	T22
5310			Performance Meas:	Transit		Comp Date:	12/31/2025
Project Status:			Capacity Enhancing:	No		RTP ID:	11334
T22 = Programming actions in progress or programmed in current MTIP			Conformity Exempt:	Yes		CMP:	No
			30 Day Notice Begin:	8/30/2022		TCM:	No
			30 Day Notice End:	9/28/2022		TSMO Award	No
			Funding Source	FTA		TSMO Cycle	N/A
			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



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: September 19, 2022
To: Metro Council and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: September FFY 2023 MTIP Formal Amendment & Resolution 22-5283 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?

JPACT approved 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 and now recommends approval by Metro Council.

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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

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.

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

(#5) 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.
(#6) 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 funds and expand description per FTA guidance
(#7) ODOT Key # 22192 MTIP ID: 71144	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2022	SMART Bus Purchase/PM/ Amenities and Technology 2022	<u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project per the updated UZA Apportionment letter
(#8) 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.

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

(#9) 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
(#10) ODOT Key # 22195 MTIP ID: 71145	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2023	Maintenance and Bus Fleet Replacement and Software	<u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project
(#11) ODOT Key # 22196 MTIP ID: 71136	SMART	SMART Senior and Disabled Program (2024)	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.
(#12) ODOT Key # 22198 MTIP ID: 71146	SMART	SMART Bus Purchase/PM/ Amenities and Technology 2024	Maintenance and Bus Fleet Replacement and Software	<u>INCREASE FUNDING:</u> Add approved FTA Section 5307 funds to the project
(#13) ODOT Key # 22164 MTIP ID: 71103	TriMet	Transit Oriented Development (TOD) program (FFY 2023) Preventive Maintenance Support (FFY 2023)	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	<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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

			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	<u>ADD FUNDING:</u> 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	<u>ADD FUNDING:</u> 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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT FROM: KEN LOBECK DATE: SEPTEMBER 19, 2022

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.

JPACT September 15, 2022 Meeting Summary:

The September Formal MTIP Amendment was included as a consent item on the JPACT agenda. The amendment was passed without discussion or comments by JPACT members.

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 	

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

- 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	075248, 07442, 16161

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



Project #2	Portland Metro and Surrounding Areas Safety Reserve (New Project)
<p>Project Description:</p> <p>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.</p>	
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none">Lead Agency: ODOT	

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

- 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

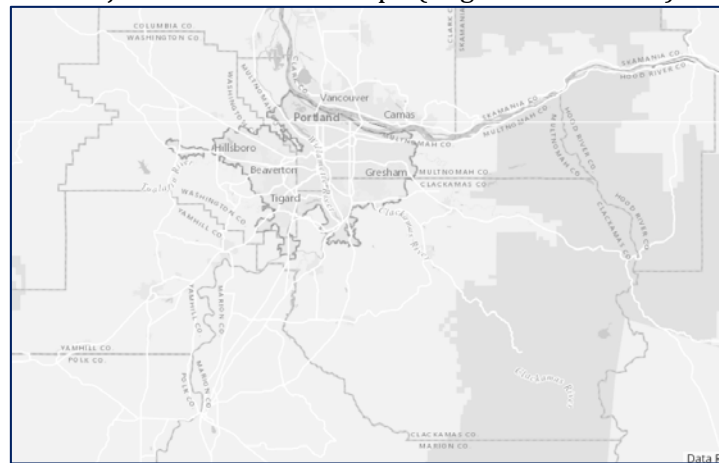
SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

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 Location Area Map - (Regional Locations)



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.

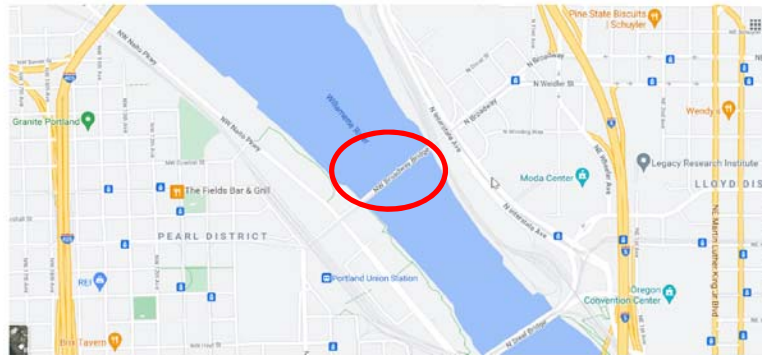
The LABSC voted 9-0 to fully fund the first 3 big bridges on the list (Marion County, City of Eugene, Multnomah County Broadway Bridge), and to have the City of Klamath Falls Bridge included in the scoping effort this summer, with a \$5M placeholder for funding.

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

Identifications/Key Consistency Check Areas:

- Lead Agency: SMART
- ODOT Key Number: **20874**

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT FROM: KEN LOBECK DATE: SEPTEMBER 19, 2022

- 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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

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

Services and Facility Improvements for Elderly and Disabled Customers

Identifications/Key Consistency Check Areas:

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

Description of Changes

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

Support Items:

Project Details			Programming History		Current and Revised Programming Amounts				
Key	Lead Agency	Project Name	Current Programmed Year	Federal Fund Type	Current Federal Amounts	Revised Federal	Revised Local	Revised Other	Revised Total
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	\$ -	\$ -	\$ -	\$ -

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #6	SMART Bus and Bus Facilities (Capital) 2022																																			
<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: 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 																																				
<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 which is then split among TriMet, SMART, and C-Tran.</p>																																				
<p>Support Items: FTA Apportionment Funding Update Split</p> <p>June 8, 2022 Linda Gehrke, Regional Administrator Federal Transit Administration, Region X 915 Second Avenue, Suite 3142 Seattle, WA 98174-1002</p> <p>Re: Split Letter for FFY2022 Apportionment funding</p> <p>Dear Ms. Gehrke:</p> <p>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.</p> <p>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:</p> <table border="1"> <thead> <tr> <th>Agency</th> <th>Section 5307</th> <th>Section 5337 HIFG</th> <th>Section 5337 HIMB</th> <th>Section 5339</th> <th>Section 5310</th> <th>Total FFY2022 Formula Funds</th> </tr> </thead> <tbody> <tr> <td>TriMet</td> <td>51,930,404 *</td> <td>38,199,581</td> <td>24,177</td> <td>3,048,873</td> <td>1,961,709 *</td> <td>95,164,744</td> </tr> <tr> <td>SMART</td> <td>576,323 *</td> <td>0</td> <td>0</td> <td>48,763</td> <td>0 *</td> <td>625,086</td> </tr> <tr> <td>C-TRAN</td> <td>7,201,228</td> <td>0</td> <td>164,470</td> <td>616,915</td> <td>545,101</td> <td>8,529,714</td> </tr> <tr> <td>Total</td> <td>\$ 59,707,955</td> <td>\$ 38,199,581</td> <td>\$ 188,647</td> <td>\$ 3,716,551</td> <td>\$ 2,506,810</td> <td>\$104,319,544</td> </tr> </tbody> </table> <p>* 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.</p> <p>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).</p>		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
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SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT FROM: KEN LOBECK DATE: SEPTEMBER 19, 2022

Project #7	SMART Bus Purchase/PM/ Amenities and Technology 2022																																			
<p><u>Project Description:</u> Maintenance and Bus Fleet Replacement and Software</p>																																				
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • 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 																																				
<p><u>Description of Changes</u> 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.</p> <p>The funding increase results from summer update to the authorize FTA formula apportionments to the Urbanized Area (UZA) and subsequent split among TriMet, SMART and C-Tran.</p>																																				
<p>Support Items:</p> <p style="text-align: center;">UZA Apportionment Revised Split Letter</p> <p>June 8, 2022 Linda Gehrke, Regional Administrator Federal Transit Administration, Region X 915 Second Avenue, Suite 3142 Seattle, WA 98174-1002</p> <p>Re: Split Letter for FFY2022 Apportionment funding</p> <p>Dear Ms. Gehrke:</p> <p>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.</p> <p>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:</p> <table border="1"> <thead> <tr> <th>Agency</th> <th>Section 5307</th> <th>Section 5337 HIFG</th> <th>Section 5337 HIMB</th> <th>Section 5339</th> <th>Section 5310</th> <th>Total FFY2022 Formula Funds</th> </tr> </thead> <tbody> <tr> <td>TriMet</td> <td>51,930,404 *</td> <td>38,199,581</td> <td>24,177</td> <td>3,048,873</td> <td>1,961,709 *</td> <td>95,164,744</td> </tr> <tr> <td>SMART</td> <td>576,323 *</td> <td>0</td> <td>0</td> <td>48,763</td> <td>0 *</td> <td>625,086</td> </tr> <tr> <td>C-TRAN</td> <td>7,201,228</td> <td>0</td> <td>164,470</td> <td>618,915</td> <td>545,101</td> <td>8,529,714</td> </tr> <tr> <td>Total</td> <td>\$ 59,707,955</td> <td>\$ 38,199,581</td> <td>\$ 188,647</td> <td>\$ 3,716,551</td> <td>\$ 2,506,810</td> <td>\$104,319,544</td> </tr> </tbody> </table> <p><small>* 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.</small></p> <p>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).</p>		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
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SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #8	SMART Senior and Disabled Program (2023)
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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
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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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #9	SMART Bus and Bus Facilities (Capital) 2023																																																																													
<p><u>Project Description:</u> 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 																																																																														
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SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #10	SMART Bus Purchase/PM/ Amenities and Technology 2023																																																																						
<p><u>Project Description:</u> Maintenance and Bus Fleet Replacement and Software</p>																																																																							
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • 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 																																																																							
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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: <ul style="list-style-type: none"> 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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #12	SMART Bus Purchase/PM/ Amenities and Technology 2024																																																																														
<p><u>Project Description:</u> Maintenance and Bus Fleet Replacement and Software</p>																																																																															
<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 																																																																															
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SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

Project #13

Transit-Oriented Development (TOD) program (FFY 2023)
Preventive Maintenance Support (FFY 2023)

Project Description:

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

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

Identifications/Key Consistency Check Areas:

Lead Agency: TriMet

ODOT Key Number: 22164

Added note: Because the project is being advanced from FFY 2025 which is outside of the STIP years, ODOT will assign a new Key number for the project.

MTIP ID#: 71103

RTP ID: 11335 - Operating Capital: Equipment and Facilities Phase 1

Proof-of Funding/Fiscal Constraint Demonstrated: Yes

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

OTC approval No – not applicable

Performance Measurements applicable: Yes – Transit

Special Amendment Performance Assessment Required: No

Were overall RTP Consistency checks achieved and satisfactory: Yes

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

Description of Changes

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

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

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

Support Items:

RFFA Step 1 Summary Allocation Table

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

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

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

Description of Changes

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

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

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

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

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT

FROM: KEN LOBECK

DATE: SEPTEMBER 19, 2022

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	\$ 1,843,824	\$ 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.

SEPTEMBER FFY 2023 FORMAL MTIP AMENDMENT FROM: KEN LOBECK DATE: SEPTEMBER 19, 2022

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:

JPACT approved 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 and now recommends approval by Metro Council.

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



Oregon

Kate Brown, Governor


Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE
Salem, OR 97301-3871

DATE: June 30, 2022

TO: Oregon Transportation Commission



FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item L – Annual STIP Adjustment

Requested Action:

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

Background:

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

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

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

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

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

Oregon Transportation Commission

June 30, 2022

Page 2

Next Steps:

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

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

Attachments:

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

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
20435	1	OR99W: I-5 - McDonald St	7.47	13.74		CN	Preservation	Fix-It Region 1 SW ADA	\$26,385,466.00	\$35,285,466.00	\$8,900,000.00	Attachment 1: OTG July 14, 2022 Annual Amendment Staff Item
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00	\$2,537,377.00	Increase the Construction phase, adding funds for ADA and preservation scope.
22431	1	OR141/OR217 curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00	\$1,925,639.00	Add CN phase for 2024.
22432	1	US30BY curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06	\$8,333,068.06	Increase PE & RW
22603	1	I-405 Fremont bridge (Willamette River) West ramps	var	var		PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00	\$11,759,000.00	Add new project
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new project
22613	1	Portland Metro and surrounding areas safety reserve	var	var		OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new safety bucket
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00	Cancel CN phase. Add \$1.6M to PE. Schedule extended due to additional design work needed for fish passage. CN will be funded in next STIP.
							Fish Passage					
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00	Add \$500k to PE and \$14M to CN for full length widening to 3 lanes SB, replace Battle Cr Rd Br, add broadband to entire project length and inflation costs. Add NB Commercial St Br to location data.
							Modernization					
21538	2	I-105: Willamette R - Pacific Hwy	0.91	3.99	08689B, 08689C, 08689D, 08689E, 08689F, 08700A, 08965E	CN		Fix-It SW IM Fix-It SW Bridge	\$6,981,420.00	\$11,221,527.00	\$4,240,107.00	Add \$4,240,107 to CN to account for increase in paving material cost. Add bridge locations that were not added per CMR-01, update description to include repairing delamination on bridges.
							Preservation					
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert	\$2,000,000.00	\$2,946,123.00	\$946,123.00	Add \$946,123 to CN phase due to stream enhancement, inflation and increased materials cost.
							Fish Passage					
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition	\$11,109,200.00	\$12,063,225.00	\$954,025.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition	\$6,330,298.00	\$9,075,262.00	\$2,744,964.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed	\$1,757,001.00	\$750,000.00	-\$1,007,001.00	Cancel CN phase. Project can't be delivered within current schedule. Add \$454,999 to PE. Project expanded to entire city portion of trail route.
							Bike/Ped					
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
							Modernization					
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2	\$0.00	\$3,300,000.00	\$3,300,000.00	Add new CN-only project to complete paving project. Design was completed in K21548. Due to cost escalation the construction scope of that KN was reduced.
							Preservation					
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2	\$0.00	\$1,400,000.00	\$1,400,000.00	Add a new design-only project to construct a roundabout using \$500k Rail funds and \$900k of Region 2 funds.
							Operations					
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety	\$7,269,656.00	\$4,969,328.00	-\$2,300,328.00	Moving HB2017 Safety funds to new project K22597 for chip seal and safety improvements on US199 and OR42
							OP-ITS					
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS	\$3,237,000.00	\$4,417,000.00	\$1,180,000.00	Project was selected for SWIP strategic program. Project also adds local funds. Scope added for additional pedestrian features and sidewalks.
							Modernization					
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3	\$5,758,962.00	\$15,356,000.00	\$9,597,038.00	Combine portion of scope from K21713, advance CN funds from 24-27 STIP to fund addition of NB portion of project previously funded through PE
							Preservation					
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
							Preservation					
21676	3	OR99/OR238/OR62: Big X Intersection (Medford)	var	var	18525, 06605A, 08821, 09590	PE & CN		HB2017 Preservation JTA	\$11,162,700.00	\$14,273,172.00	\$3,110,472.00	Adding JTA and SW HB2017 funds; removing some AT Leverage and Fix-It SW Bridge funds to make project whole.
							Preservation					
21677	3	OR42: Lookinglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Adding IJA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
							Preservation					
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3	\$1,159,000.00	\$1,995,000.00	\$836,000.00	Adding funds from CN phase of 21698 to fund DAP estimate of this higher priority project
							Operations					
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3	\$969,000.00	\$133,000.00	-\$836,000.00	Cancel CN phase of this project to fund higher priority project; K21680. CN phase of this project will be a priority in the 24-27 STIP
							Operations					
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3	\$2,722,800.00	\$0.00	-\$2,722,800.00	Cancel project; scope and funding added to K21673 and K21674; Savings will go back to the R3 ARTS program
							Safety					

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22384	3	OR99: Glenwood - Coleman Creek	10.23	11.03		CN	Operations	SW Pedbike Strategic AT Leverage	\$1,900,000.00	\$1,127,496.00	\$772,504.00	Attachment 1: OTG July 14, 2022 Annual Amendment Staff Item
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	var	var		PE & RW	ADA	SW ADA Transition	\$6,427,380.00	\$8,066,607.00	\$1,639,227.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22438	3	Jackson County curb ramps, phase 2	var	var		PE & RW	ADA	SW ADA Transition	\$5,247,353.00	\$8,476,501.00	\$3,229,148.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22597	3	OR42: Lookingglass Crk - Benedict & US199: Applegate - CA	var	var		PE, CN, & OT	Preservation	SW Chip Seal, HB2017 Safety Region 3	\$0.00	\$8,471,000.00	\$8,471,000.00	Add new priority safety project. Funds coming from K21677 and K20166
	3	Payton Bridge Deck Rehabilitation	35.41	35.41	16063	PE	Bridge	Fix-It SW Bridge	\$0.00	\$1,235,000.00	\$1,235,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
	3	I-5: Cabin Creek - Sutherlin	136.52	143		PE	Preservation	Fix-It SW IM	\$0.00	\$750,000.00	\$750,000.00	New Project to review existing forensic info and complete additional field investigation to determine extent of repairs needed. Once identified, will design project through DAP
	3	OR99: Rogue River Bridge, Gold Hill Spur	2.65	2.65	00576	PE	Bridge	Fix-It SW Bridge	\$0.00	\$2,139,000.00	\$2,139,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
20011	4	US20: Tumalo - Cooley Rd. (Bend)	14.31	18.3		CN	Preservation	Enhance region 4 - \$914,939 R4 Highway Leverage Region 4 - \$44,874 R4 Fix-It Region 4 - \$700,000 ARTS Region 4 - \$1,485,745	\$20,446,815.00	\$23,592,373.00	\$3,145,558.00	Additional funds being added to account for market changes and construction cost increases. Project current includes HWY Leverage, Safety, Preservation, ARTS funds; the added funds reflect increases in the corresponding construction items.
20167	4	OR126: Redmond-Powell Butte	0.22	6.9		PE, RW, UR, & CN	Preservation	Fix-it SW Bridge - \$868,697 SWIP - \$122,692 Fix-It Region 4 - \$3,310,458	\$8,917,395.00	\$13,219,242.00	\$4,301,847.00	Additional preservation funds being added to account for market changes and construction cost increases, bridge funds are being added to address new bridge scope added to the project, SWIP funds added to address sidewalk deficiencies.
21644	4	I-84: Rufus and Arlington Bridge deck rehabilitation	108.96 137.77	109.06 138.05	08820 & 09213	CN	Bridge	Fix-it SW Bridge	\$9,908,366.00	\$17,440,923.00	\$7,532,557.00	Approximately half of the funds being added are to account for market changes and construction cost increases. The remaining funds are needed to account for added bridge scope, with one bridge on I-84 being added as well as one bridge on US197. The US197 bridge will be moving \$745,789 in CN funds from K21640 to K21644.
22442	4	Sisters and Bend curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$6,502,701.00	\$9,042,316.00	\$2,539,615.00	Increase the Preliminary Engineering and Right of Way phase estimates.
22473	4	Chiloquin Community Safe and Healthy Connections				PE & CN	BikePed	SW Off-Sys BikePed	\$508,525.00	\$0.00	-\$508,525.00	Cancelling as the city withdrew their application.
22607	4	Revere Avenue Rail Crossing (Bend)				PL	Safety	SW Rail Crossing	\$0.00	\$500,000.00	\$500,000.00	Add new project for planning and analysis for ped/bike improvements, ADA accommodations, cross section modifications, signal upgrades, and crossing surface upgrades to improve the safety of the existing rail crossing.
22616	4	Reed Rd Rail Crossing (LaPine)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22617	4	Celilo Frontage Road Rail Crossing (Celilo Village)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22618	4	Merrill Pit Road Rail Crossing (Klamath County)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates, lighting, signage and striping to improve the safety of the existing rail crossing for the traveling public.
22620	4	US97: Bridge Over OR422 (Chiloquin)	247.54	247.54	06886	PE, RW, UR, & CN	Bridge	Fix-it SW Bridge	\$0.00	\$1,285,401.00	\$1,285,401.00	Add new project for structural overlay for the bridge.
	4	Warm Springs Tribe fund transfer				OT	Bike/Ped	SW Off Sys BikePed	\$0.00	\$319,080.80	\$319,080.80	Add a new project to transfer funds to the Bureau of Indian Affairs (BIA).
21873	5	OR86: Fish Creek	63.22	63.22		CN	Culvert	Fix-it SW Culvert	\$4,854,007.00	\$5,854,007.00	\$1,000,000.00	add \$1M CON for inflation.
21874	5	Morgan Lake Road safety improvements				CN	Safety	ARTS Region 5	\$1,283,369.00	\$1,782,562.00	\$499,193.00	add \$499,193 CON for inflation
21877	5	I-84: Emigrant Hill - Meacham (west-bound)	217.77	237.99		CN	Preservation	Fix-it SW IM	\$4,568,908.00	\$5,215,159.00	\$646,251.00	Add \$646,251 CON for inflation
21898	5	Baker & Union Counties Traffic Signal Safety Improvements	var	var		CN	Safety	ARTS Region 5	\$1,142,999.00	\$2,144,515.00	\$1,001,516.00	add \$1,001,516 CON for inflation
22383	5	OR86: Guardrail Upgrades Final Phase	34.03	70.75		CN	Safety	1R, Fix-it SW Bridge	\$3,469,000.00	\$5,392,000.00	\$1,923,000.00	add \$1.6M to Construction for inflation and \$323,000 in bridge funding for new scope.

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

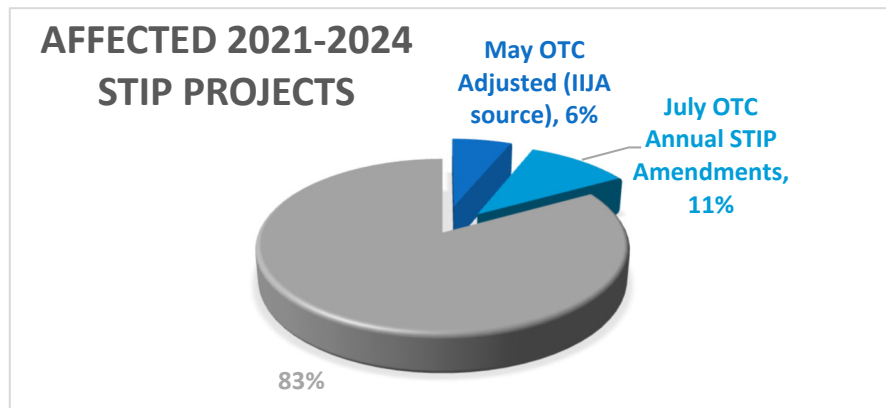


Applying Climate Lens to the 2022 Annual STIP Adjustment

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

Scope of Analysis

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



Process

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

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

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

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

Results: Key Climate Observations

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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.

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

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



Oregon

Kate Brown, Governor


Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE
Salem, OR 97301-3871

DATE: June 30, 2022

TO: Oregon Transportation Commission



FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item L – Annual STIP Adjustment

Requested Action:

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

Background:

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

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	\$26,385,466.00	\$3,235,466.00	\$23,150,000.00	Attachment 1: OTG July 14, 2022 Annual Amendment Staff Item
21711	1	OR35: US26 overcrossing bridge	57.57	57.59	16136	CN	Bridge	Fix-It SW Bridge	\$613,496.00	\$3,150,873.00	\$2,537,377.00	Increase the Construction phase, adding funds for ADA and preservation scope.
22431	1	OR141/OR217 curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$2,736,658.00	\$4,662,297.00	\$1,925,639.00	Add CN phase for 2024.
22432	1	US30BY curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$17,223,369.00	\$25,556,437.06	\$8,333,068.06	Increase PE & RW
22603	1	I-405 Fremont bridge (Willamette River) West ramps	var	var		PE & RW	Bridge	Fix-It SW Bridge	\$0.00	\$11,759,000.00	\$11,759,000.00	Add new project
22609	1	OR 8: East Lane (Cornelius)	15.2	15.2		PE & CN	Safety	ARTS	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new project
22613	1	Portland Metro and surrounding areas safety reserve	var	var		OT	Safety	HB2017 Safety	\$0.00	\$1,000,000.00	\$1,000,000.00	Add new safety bucket
18271	2	US101 at Asbury Creek	34.7	34.8	01796	PE, CN		Fix-It SW Fish Pass	\$7,300,000.00	\$3,400,000.00	-\$3,900,000.00	Cancel CN phase. Add \$1.6M to PE. Schedule extended due to additional design work needed for fish passage. CN will be funded in next STIP.
							Fish Passage					
19929	2	I-5: Kuebler Blvd to Delaney Rd widening	248.41	251.53	07524B, 07442, 16161	PE & CN		Enhance Region 2 Fix-It SW Bridge	\$35,960,436.00	\$50,460,436.00	\$14,500,000.00	Add \$500k to PE and \$14M to CN for full length widening to 3 lanes SB, replace Battle Cr Rd Br, add broadband to entire project length and inflation costs. Add NB Commercial St Br to location data.
							Modernization					
21538	2	I-105: Willamette R - Pacific Hwy	0.91	3.99	08689B, 08689C, 08689D, 08689E, 08689F, 08700A, 08965E	CN		Fix-It SW IM Fix-It SW Bridge	\$6,981,420.00	\$11,221,527.00	\$4,240,107.00	Add \$4,240,107 to CN to account for increase in paving material cost. Add bridge locations that were not added per CMR-01, update description to include repairing delamination on bridges.
							Preservation					
22433	2	OR36: Cleveland Creek Culvert	5.68	5.68		CN		HB2017 Culvert	\$2,000,000.00	\$2,946,123.00	\$946,123.00	Add \$946,123 to CN phase due to stream enhancement, inflation and increased materials cost.
							Fish Passage					
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.30 121.42	118.70 125.00		PE & RW		SW ADA Transition	\$11,109,200.00	\$12,063,225.00	\$954,025.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22435	2	OR47/OR8/US30 curb ramps	var	var		PE & RW		SW ADA Transition	\$6,330,298.00	\$9,075,262.00	\$2,744,964.00	Increase the Preliminary Engineering and Right of Way phase estimates. Slip the Right of Way phase to begin in federal fiscal year 2023.
							ADA					
22459	2	Rockaway Beach Path				PE & CN		SW Off-Sys BikePed	\$1,757,001.00	\$750,000.00	-\$1,007,001.00	Cancel CN phase. Project can't be delivered within current schedule. Add \$454,999 to PE. Project expanded to entire city portion of trail route.
							Bike/Ped					
	2	OR132: Good Pasture Rd to Green Acres Rd	0.26	0.76	09358	PE		JTA	\$0.00	\$6,086,051.00	\$6,086,051.00	Add new design-only project using JTA saving from Beltline projects.
							Modernization					
	2	OR18: Oldsville Rd - MP 43.81	40.38	43.81		CN		Fix-It Region 2	\$0.00	\$3,300,000.00	\$3,300,000.00	Add new CN-only project to complete paving project. Design was completed in K21548. Due to cost escalation the construction scope of that KN was reduced.
							Preservation					
	2	OR126: Huston Roundabout	47.83	47.85		PE		Rail Safety Fix-It Region 2	\$0.00	\$1,400,000.00	\$1,400,000.00	Add a new design-only project to construct a roundabout using \$500k Rail funds and \$900k of Region 2 funds.
							Operations					
20166	3	I-5 & OR138E: Variable Message & Curve Warning Signs	45.61 99.00	135.15 99.00		CN		HB2017 Safety	\$7,269,656.00	\$4,969,328.00	-\$2,300,328.00	Moving HB2017 Safety funds to new project K22597 for chip seal and safety improvements on US199 and OR42
							OP-ITS					
20261	3	US101: Parkview Dr - Lucky Ln (Brookings)	355.87	356.74		PE, RW, & CN		SW SRTS	\$3,237,000.00	\$4,417,000.00	\$1,180,000.00	Project was selected for SWIP strategic program. Project also adds local funds. Scope added for additional pedestrian features and sidewalks.
							Modernization					
21673	3	I-5: Azalea - Glendale	var	var	19312, 19107, 19313, 19106, 19891	CN & OT		Fix-It SW IM Fix-It Region 3	\$5,758,962.00	\$15,356,000.00	\$9,597,038.00	Combine portion of scope from K21713, advance CN funds from 24-27 STIP to fund addition of NB portion of project previously funded through PE
							Preservation					
21675	3	I-5: North Ashland - South Ashland	11.44	19	08739	CN		Fix-It SW IM Fix-It SW Bridge	\$900,000.00	\$12,595,393.00	\$11,695,393.00	Advance CN funding from 24-27 STIP
							Preservation					
21676	3	OR99/OR238/OR62: Big X Intersection (Medford)	var	var	18525, 06605A, 08821, 09590	PE & CN		HB2017 Preservation JTA	\$11,162,700.00	\$14,273,172.00	\$3,110,472.00	Adding JTA and SW HB2017 funds; removing some AT Leverage and Fix-It SW Bridge funds to make project whole.
							Preservation					
21677	3	OR42: Lookinglass Creek to I-5 (Winston)	72.54	76.03	01986A, 01923, 01923A, 02173A	CN		Fix-It Region 3 SW Fix-It Bridge	\$13,060,372.00	\$18,860,700.00	\$5,800,328.00	Adding IJA Pres and Bridge funds to accommodate inflated bids and additional paving treatments
							Preservation					
21680	3	US101 at East Bay Road	233.45	233.45		CN		Fix-It Region 3	\$1,159,000.00	\$1,995,000.00	\$836,000.00	Adding funds from CN phase of 21698 to fund DAP estimate of this higher priority project
							Operations					
21698	3	US101: Anderson Rockfall	334.3	334.3		CN		Fix-It Region 3	\$969,000.00	\$133,000.00	-\$836,000.00	Cancel CN phase of this project to fund higher priority project; K21680. CN phase of this project will be a priority in the 24-27 STIP
							Operations					
21713	3	I-5: Region 3 Clear Zone Improvements	var	var		PE, RW, CN, & OT		ARTS region 3	\$2,722,800.00	\$0.00	-\$2,722,800.00	Cancel project; scope and funding added to K21673 and K21674; Savings will go back to the R3 ARTS program
							Safety					

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22384	3	OR99: Glenwood - Coleman Creek	10.23	11.03		CN	Operations	SW Pedbike Strategic AT Leverage	\$1,900,000.00	\$1,127,496.00	\$772,504.00	Attachment 1: OTG July 14, 2022 Annual Amendment Staff Item
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	var	var		PE & RW	ADA	SW ADA Transition	\$6,427,380.00	\$8,066,607.00	\$1,639,227.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22438	3	Jackson County curb ramps, phase 2	var	var		PE & RW	ADA	SW ADA Transition	\$5,247,353.00	\$8,476,501.00	\$3,229,148.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22597	3	OR42: Lookingglass Crk - Benedict & US199: Applegate - CA	var	var		PE, CN, & OT	Preservation	SW Chip Seal, HB2017 Safety Region 3	\$0.00	\$8,471,000.00	\$8,471,000.00	Add new priority safety project. Funds coming from K21677 and K20166
	3	Payton Bridge Deck Rehabilitation	35.41	35.41	16063	PE	Bridge	Fix-It SW Bridge	\$0.00	\$1,235,000.00	\$1,235,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
	3	I-5: Cabin Creek - Sutherlin	136.52	143		PE	Preservation	Fix-It SW IM	\$0.00	\$750,000.00	\$750,000.00	New Project to review existing forensic info and complete additional field investigation to determine extent of repairs needed. Once identified, will design project through DAP
	3	OR99: Rogue River Bridge, Gold Hill Spur	2.65	2.65	00576	PE	Bridge	Fix-It SW Bridge	\$0.00	\$2,139,000.00	\$2,139,000.00	Advance PE phase from 24-27 STIP, CN to be completed in 24-27 STIP
20011	4	US20: Tumalo - Cooley Rd. (Bend)	14.31	18.3		CN	Preservation	Enhance region 4 - \$914,939 R4 Highway Leverage Region 4 - \$44,874 R4 Fix-It Region 4 - \$700,000 ARTS Region 4 - \$1,485,745	\$20,446,815.00	\$23,592,373.00	\$3,145,558.00	Additional funds being added to account for market changes and construction cost increases. Project current includes HWY Leverage, Safety, Preservation, ARTS funds; the added funds reflect increases in the corresponding construction items.
20167	4	OR126: Redmond-Powell Butte	0.22	6.9		PE, RW, UR, & CN	Preservation	Fix-it SW Bridge - \$868,697 SWIP - \$122,692 Fix-It Region 4 - \$3,310,458	\$8,917,395.00	\$13,219,242.00	\$4,301,847.00	Additional preservation funds being added to account for market changes and construction cost increases, bridge funds are being added to address new bridge scope added to the project, SWIP funds added to address sidewalk deficiencies.
21644	4	I-84: Rufus and Arlington Bridge deck rehabilitation	108.96 137.77	109.06 138.05	08820 & 09213	CN	Bridge	Fix-it SW Bridge	\$9,908,366.00	\$17,440,923.00	\$7,532,557.00	Approximately half of the funds being added are to account for market changes and construction cost increases. The remaining funds are needed to account for added bridge scope, with one bridge on I-84 being added as well as one bridge on US197. The US197 bridge will be moving \$745,789 in CN funds from K21640 to K21644.
22442	4	Sisters and Bend curb ramps	var	var		PE & RW	ADA	SW ADA Transition	\$6,502,701.00	\$9,042,316.00	\$2,539,615.00	Increase the Preliminary Engineering and Right of Way phase estimates.
22473	4	Chiloquin Community Safe and Healthy Connections				PE & CN	BikePed	SW Off-Sys BikePed	\$508,525.00	\$0.00	-\$508,525.00	Cancelling as the city withdrew their application.
22607	4	Revere Avenue Rail Crossing (Bend)				PL	Safety	SW Rail Crossing	\$0.00	\$500,000.00	\$500,000.00	Add new project for planning and analysis for ped/bike improvements, ADA accommodations, cross section modifications, signal upgrades, and crossing surface upgrades to improve the safety of the existing rail crossing.
22616	4	Reed Rd Rail Crossing (LaPine)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22617	4	Celilo Frontage Road Rail Crossing (Celilo Village)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates and lighting to improve the safety of the existing rail crossing for the traveling public.
22618	4	Merrill Pit Road Rail Crossing (Klamath County)				PE	Safety	SW Rail Crossing	\$0.00	\$150,000.00	\$150,000.00	Add new project to design gates, lighting, signage and striping to improve the safety of the existing rail crossing for the traveling public.
22620	4	US97: Bridge Over OR422 (Chiloquin)	247.54	247.54	06886	PE, RW, UR, & CN	Bridge	Fix-it SW Bridge	\$0.00	\$1,285,401.00	\$1,285,401.00	Add new project for structural overlay for the bridge.
	4	Warm Springs Tribe fund transfer				OT	Bike/Ped	SW Off Sys BikePed	\$0.00	\$319,080.80	\$319,080.80	Add a new project to transfer funds to the Bureau of Indian Affairs (BIA).
21873	5	OR86: Fish Creek	63.22	63.22		CN	Culvert	Fix-it SW Culvert	\$4,854,007.00	\$5,854,007.00	\$1,000,000.00	add \$1M CON for inflation.
21874	5	Morgan Lake Road safety improvements				CN	Safety	ARTS Region 5	\$1,283,369.00	\$1,782,562.00	\$499,193.00	add \$499,193 CON for inflation
21877	5	I-84: Emigrant Hill - Meacham (west-bound)	217.77	237.99		CN	Preservation	Fix-it SW IM	\$4,568,908.00	\$5,215,159.00	\$646,251.00	Add \$646,251 CON for inflation
21898	5	Baker & Union Counties Traffic Signal Safety Improvements	var	var		CN	Safety	ARTS Region 5	\$1,142,999.00	\$2,144,515.00	\$1,001,516.00	add \$1,001,516 CON for inflation
22383	5	OR86: Guardrail Upgrades Final Phase	34.03	70.75		CN	Safety	1R, Fix-it SW Bridge	\$3,469,000.00	\$5,392,000.00	\$1,923,000.00	add \$1.6M to Construction for inflation and \$323,000 in bridge funding for new scope.

Key Number	Region	Project name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total	Proposed total	Difference	Description of change
22445	5	Burns & Hines curb ramps	0 128.00	0.50 132.2		PE & RW		SW ADA Transition	\$5,222,246.00	\$7,261,783.00	\$2,039,537.00	Increased the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22446	5	Grant County curb ramps	var	var		PE & RW		SW ADA Transition	\$4,544,038.00	\$6,279,410.00	\$1,735,372.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22447	5	Jordan Valley/Ontario/Huntington/Adrian curb ramps	var	var		PE & RW		SW ADA Transition, Fix-it SW SWIP bikeped	\$3,163,476.00	\$5,750,309.00	\$2,586,833.00	Increase the Preliminary Engineering and Right of Way phase estimates due to current economic conditions, skilled labor shortages, and the anticipated cost reductions we expected to see due to the maturation of the program have not materialized.
22453	5	Belt Park Greenway Trail (Hermiston)				PE & CN	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		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 IJJA 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 IJJA 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 IJJA 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	



Attachment 1: OTC July 14, 2022 Annual Amendment Staff Item

2022 Annual STIP Update

Agenda Item I, Attachment 2

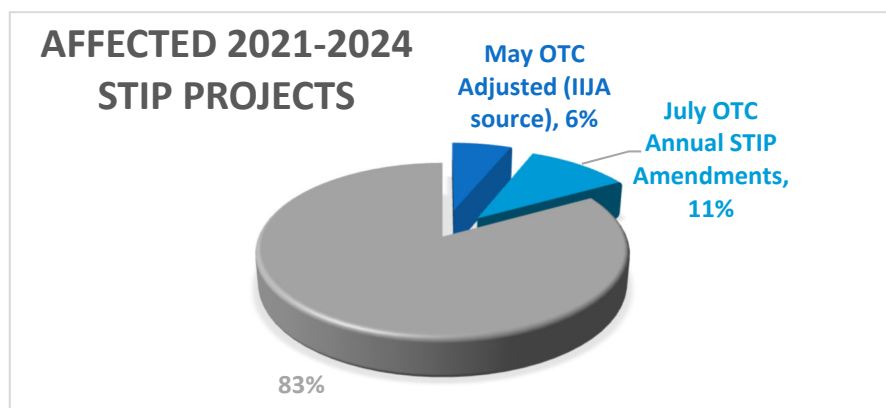
July
2022

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

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