Council work session agenda

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

Tuesday, September 13, 2022 **10:30 AM** **https://zoom.us/j/615079992 (Webinar ID: 615079992) or 929-205-6099 (toll free)**

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10:30 Call to Order and Roll Call

Work Session Topics:

10:35 Smith and Bybee Wetlands Natural Area Historical Collection — 22-5760

Presenter(s): Becky Shoemaker (she/her), Metro
Pam Welch (she/her), Metro
Alicia Butler (she/her), San Jose State University
Elaine Stewart (she/her)
Jonathan Soll (he/him), Metro,
Andrea Berkley (she/her), Metro

Attachments: Staff Report
Attachment 1
Attachment 2

11:20 2023 RTP Congestion Pricing Policy Discussion — 22-5761

Presenter(s): Margi Bradway (she/her), Metro
Alex Oreschak (he/him), Metro

Attachments: Staff Report
Attachment 1
Attachment 2
Attachment 3

12:05 Chief Operating Officer Communication

12:10 Councilor Communication

12:15 Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែសារនៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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January 2021

Smith and Bybee Wetlands Natural Area

Work Session Topics

Metro Council Work Session
Tuesday, September 13th, 2022

STAFF REPORT: SMITH AND BYBEE NATURAL AREA HISTORIC COLLECTION

Date: August 24, 2022
Department: IT & RIM, Parks and Nature
Meeting Date: September 13, 2022

Prepared by: Pamela Welch, RIM Analyst and Becky Shoemaker, RIM Manager

Presenter(s) (if applicable): Becky Shoemaker, Pam Welch, Alicia Butler, Elaine Stewart, Jonathan Soll, Andrea Berkley
Length: 45 minutes

ISSUE STATEMENT
This presentation will showcase the work that has been completed to date on the Smith and Bybee Natural Area Historic Collection. In addition to sharing details of the project, staff will share a design concept and timeline for a Metro online exhibits webpage.

ACTION REQUESTED
None required

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
The Smith and Bybee Natural Area Historic Collection project is an example of one of the Records and Information Management (RIM) program's mandates, that is, to preserve the agency's records of enduring value. The RIM program continues to foster partnerships with institutions of higher learning to 1) provide opportunities for graduate students to gain firsthand experience working with archival records and 2) assist the RIM program to complete archival projects. This project represents a collaboration between the RIM program, Metro's Parks and Nature department, and San Jose State University (SJSU). In addition to preserving the records contained within the Smith and Bybee Wetlands Natural Area Historic Collection, the collection will be accessible to staff and the public.

As noted, this was a collaborative project between Metro RIM program staff, the Parks and Nature science team, and Alicia Butler, graduate intern from SJSU. The collection is significant because it documents the history of Metro's first natural area or park. Metro assumed ownership of Smith and Bybee in 1990, pre-dating the transfer of Multnomah County parks and the official beginning of Metro's parks program by four years. Smith and Bybee's history is intertwined with the development of the Rivergate Industrial District, and its formation as a park is unique. The park was born from negotiations among several federal, state, and local government agencies to determine how much of the wetland complex to preserve, fill, and convert to industrial development. Because of its proximity to St. Johns Landfill, Metro became involved with Smith and Bybee during the landfill's closure process, and ultimately became the steward of Smith and Bybee Wetlands Natural Area.

Many of Portland's stories are interwoven with Smith and Bybee, ranging from the Vanport flood, major industrial development, the closure of the St. Johns Landfill, and regional efforts to preserve natural areas for future generations. The collection also contains

biological and ecological studies that describe the site through time, which will be increasingly relevant as climate change continues.

BACKGROUND

Last Fall, SJSU contacted the Metro RIM program to determine if there were internship opportunities available for graduate students. RIM staff spoke with Elaine Stewart, Senior Natural Resource Scientist, to discuss the Smith and Bybee records she had been collecting for several years. Recognizing a potential internship opportunity, the RIM program contacted Jonathan Soll, Science and Stewardship Division Manager, to seek approval for the internship. In December 2021, RIM staff met with Parks and Nature science team staff to review and prepare a preliminary inventory the Smith and Bybee records.

In February 2022, Alicia Butler started work on the collection under the supervision of the RIM program. She created a more detailed records inventory; assessed the preservation needs of the records; prepared the records for permanent storage and digitization; and drafted a finding aid for the collection. Ms. Butler was so invested in the project that she continued to work on the collection as a volunteer for an additional six weeks following her graduation.

Over the past few months, the collection's finding aid has been reviewed for editing purposes and published on Metro's external website. In addition, the records have been digitized, and design concepts have been created for an online exhibit website. By the end of 2022, the digitized records will be available to staff and the public and the online exhibit for the Smith and Bybee Natural Area Historic Collection will be published on Metro's external website. In January 2023, RIM staff will meet with the Parks and Nature Science team to review their records for additions to this collection.

ATTACHMENTS

- Smith and Bybee Natural Area Historic Collection finding aid
    - Link: https://www.oregonmetro.gov/sites/default/files/2022/08/19/Smith_and_Bybee_Natural_Area_Historical_Collection_Finding_Aid_Final.pdf
- Design concept of Metro History - Online Exhibits web page
- Design concept of Smith and Bybee Online Exhibit web page

[For work session:]

- Is legislation required for Council action? ☐ Yes ☐ No
- If yes, is draft legislation attached? ☐ Yes ☐ No
- What other materials are you presenting today? See above

LIBRARY

Land use self

Transportation shelf

Nature shelf

Garbage and recycling shelf

Regional research shelf

Archives and special collections

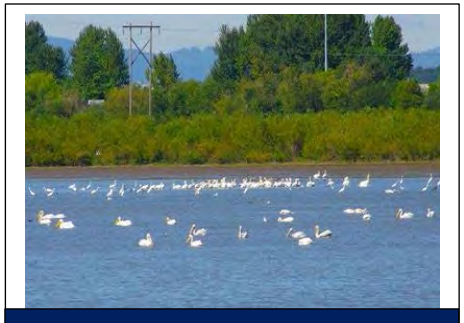
Metro history – online exhibits

Metro History - Online Exhibits

Explore the region's history with Metro's online exhibits

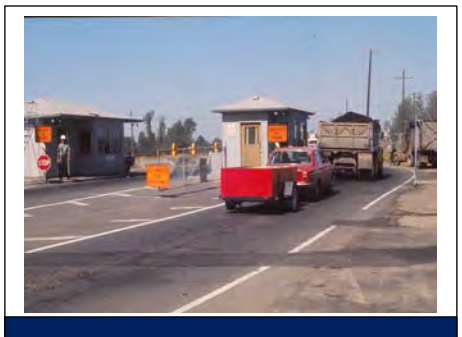
As the only directly elected regional government in the United States, Metro has been influencing the political, economic, social, and built landscape of the Portland metropolitan region since 1979. In addressing issues related to land use, transportation, waste disposal, sustainable living, conservation and education, economic development and cultural amenities, Metro has shaped the development and character of the region.

Featured



Smith and Bybee Wetlands Natural Area

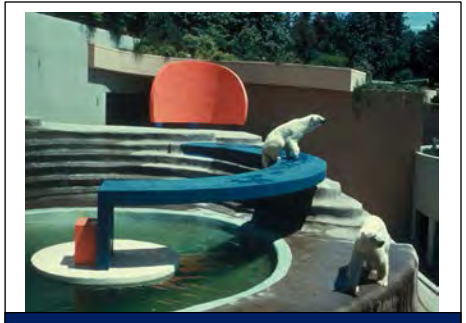
Oregon Zoo Trains



St. Johns Landfill

Waste Reduction Ad Campaigns

2040 Growth Concept



Oregon Zoo

ALL ONLINE EXHIBITS

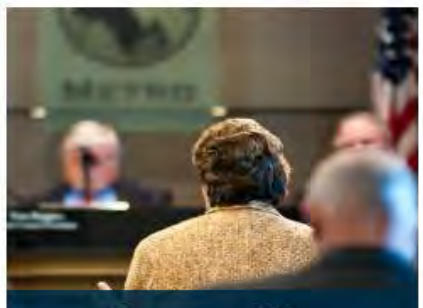
Oregon Convention Center

P'5 Theaters

Westside Corridor Project

RELATED LINKS

Public records at Metro



Know your rights

A history of Metro

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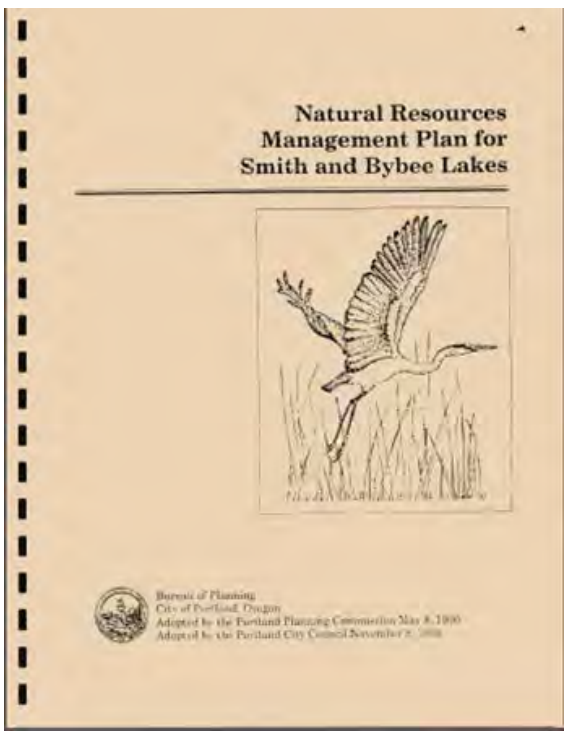
Smith and Bybee Natural Area - Online Exhibits

The Smith and Bybee Natural Area Historical Collection documents the history of Metro's first natural area and park. It contains records related to the park's governance, planning initiatives, natural resources, facilities, accessibility, and water management. The St. Johns Landfill's location within the natural area boundary has resulted in a close relationship between the two Metro programs.

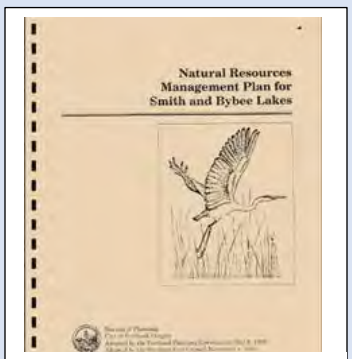
Smith and Bybee's history is intertwined with the development of the Rivergate Industrial District, and its formation as a park is unique. The park was born from negotiations among several federal, state, and local government agencies trying to determine how much of the wetland complex to preserve and how much to fill and convert to industrial development. In 1980, Metro became involved when it assumed responsibility of St. Johns Landfill operations. By the end of the decade in 1989, the Port of Portland, Oregon Division of State Lands, U.S. Army Corps of Engineers, Oregon Department of Fish and Wildlife, U.S. Department of Fish and Wildlife Service, and the Environmental Protection Agency gathered and created the *Cooperative Management Agreement* (also known as COMA or the Rivergate Agreement) to establish responsibilities for managing the wetland areas and their natural resources.



The Smith and Bybee Wetlands Natural Area was officially created in 1990 when the *Natural Resources Management Plan* (NRMP) was written to manage the implementation of the *Cooperative Management Agreement*. The plan was adopted in a joint meeting of the Metro Council and the City of Portland Council in November 1990. This also provided Metro with the resources needed to responsibly manage the wetland's natural resources, including establishing the Smith and Bybee Lakes Fund (established with landfill fees), and the Smith and Bybee Lakes Advisory Committee. More recently, the site has been managed according to a *Comprehensive Natural Resources Plan* (CNRP) adopted by the City of Portland which includes lands owned by multiple landowners within the Smith and Bybee Lakes management area.

RELATED RECORDS

Smith and Bybee Natural Area Historic Collection Finding Aid



The Natural Resources Management Plan (NRMP)

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2023 RTP Congestion Pricing Policy Discussion

Work Session Topics

Metro Council Work Session
Tuesday, September 13, 2022

CONGESTION PRICING POLICY DISCUSSIONS FOR THE 2023 RTP UPDATE

Date: August 29, 2022
Department: Planning, Development & Research
Meeting Date: September 13, 2022

Prepared by: Alex Oreschak, Senior Transportation Planner, Metro
alex.oreschak@oregonmetro.gov
Presenter(s) (if applicable):
Alex Oreschak, Senior Transportation Planner, Metro
Length: 45 minutes

ISSUE STATEMENT

In September 2021, Metro Council passed a resolution accepting the findings and recommendations in the Regional Congestion Pricing Study (RCPS) report, and directing staff to build upon existing policy in the 2018 RTP by incorporating the findings and recommendations from the study in the 2023 RTP update. On April 20, 2022, Metro staff presented to TPAC and MTAC on congestion pricing policies in the 2018 RTP, intersections with the findings and recommendations from the RCPS, and other supportive language from both the RCPS and the Expert Review Panel that convened in April 2021. Metro staff worked with a consultant team (Nelson\Nygaard) to review TPAC and MTAC feedback following that meeting and develop draft pricing policy language for the 2023 RTP. That draft language was presented to TPAC on June 3, 2022. Following that meeting, TPAC members provided input on the draft language, and revised draft policy language was shared with TPAC at a workshop on July 13, 2022, and at the joint JPACT & Metro Council workshop on July 28, 2022.

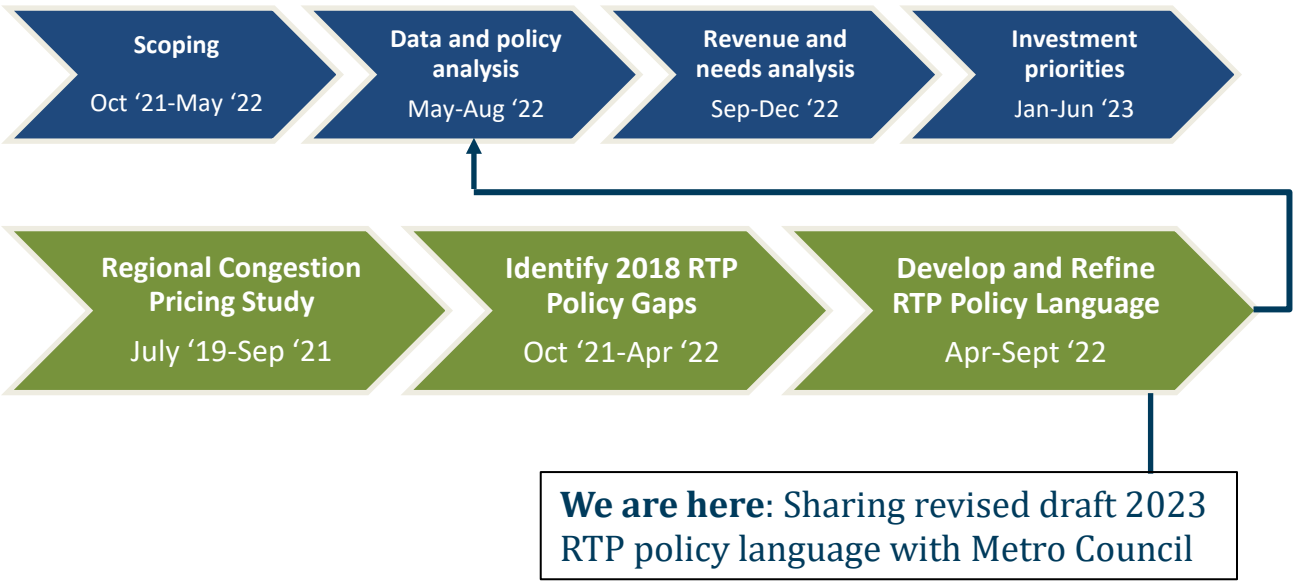
Metro staff and the consultant team have further revised the draft language to reflect input received at and following those two meetings; the revised draft language is documented in **Attachment 1: Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context August 2022**.

A summary table of the meetings and workshops at which this policy development has been discussed (including upcoming meetings in September 2022) is shown below**.**

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

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

Staff is requesting feedback from TPAC members on the revised draft pricing policy language. Input received at and following this month's meetings will conclude the current phase of developing and refining the proposed 2023 RTP policy language, as shown in the figure below. Feedback received this month will help guide final refinement of the draft language for inclusion in the draft 2023 RTP chapters, which will be shared with TPAC and other committees in late winter / early spring.



Relatedly, the Oregon Department of Transportation (ODOT) is developing an amendment to the toll policies in the Oregon Highway Plan (OHP), which will be presented to the Oregon Transportation Commission (OTC) later this year. At their August 18, 2022 meeting, JPACT requested that staff develop a comment letter for review and submission by JPACT by the end of the public comment period on September 15, 2022. A draft of this letter will be shared with TPAC following their September 2, 2022 meeting, and after revisions are made to address partner staff input, Metro Council will be provided with the draft comment letter for discussion.

Summary of July 2022 Feedback on 2023 RTP Pricing Policy

At the July 13, 2022 TPAC workshop, Metro staff shared a presentation on revised pricing policies for the 2023 RTP update and requested feedback from committee members by July 29, 2022. Written feedback was received from seven partner agencies and is documented in **Attachment 2: Feedback from July 2022 TPAC Meeting**. Attachment 2 also includes a high-level summary of the feedback received, identifying key themes and how Metro staff has or will address those themes. Metro staff also collected input at a joint JPACT & Metro Council Workshop on July 28, 2022. A summary of that workshop and the feedback received is documented in **Attachment 3: JPACT & Council Workshop #2 (July 28, 2022) Summary August 2022**. This information was used to help revise the 2023 RTP pricing policy recommendations identified above.

ACTION REQUESTED

Provide input and comment on proposed pricing policy language for the 2023 RTP update and the draft JPACT Oregon Highway Plan Toll Policy Amendment public comment letter.

IDENTIFIED POLICY OUTCOMES

Build upon existing policy in the RTP by incorporating the findings and recommendations from the RCPS in the 2023 RTP update.

POLICY QUESTION(S)

- Does Metro Council have questions regarding the process for incorporating pricing policy into the 2023 RTP Update?
- Does Metro Council have feedback on the proposed pricing policy language for the 2023 RTP update?
- What questions or comments does Metro Council have regarding the draft letter for the OHP Toll Policy Amendment?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

As detailed in Attachment 1, and based on feedback from TPAC, JPACT, and Metro Council identified in Attachment 2 and Attachment 3, staff has identified the following draft pricing policies for inclusion in the 2023 RTP update. These recommendations were shared with TPAC on September 2, 2022.

Policy 1 **Mobility**: Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.

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

Policy 3 **Safety**: Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.

Policy 4 **Diversion**: Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.

Policy 5 **Climate and Air Quality**: Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.

Policy 6 **Emerging Technologies**: Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

Attachment 1 also includes new language providing background and context for the pricing policies, including other pricing work underway in the region, state and federal policies and programs, and a brief overview of the RCPS. In addition, there are recommendations for modifying existing policy language in other parts of the RTP, including Goal 4: Reliability and Efficiency, Objective 4.6 Pricing, and policies related to safety and security, transportation demand management, and regional motor vehicle network policies. Finally, staff is recommending additional consideration on planning activities that could be identified in Chapter 8 of the 2023 RTP to address next steps for pricing at a regional level.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

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

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

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

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

- Chapter 2: Our Shared Vision and Goals for Transportation – Goal 4: Reliability and
- Efficiency
- Chapter 3: Transportation System Policies to Achieve our Vision – Section 3.5 Regional Motor Vehicle Network Vision and Policies and Section 3.11 Transportation System Management and Operations Vision and Policies
- Chapter 8: Moving Forward Together to Achieve Our Vision – Section 8.2.3.2 Regional Congestion Pricing Technical Analysis
- Appendix L: Federal Performance-Based Planning and Congestion Management Process Documentation – Table 5 and Congestion Management Process Toolbox of Strategies

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

RCPS Final Report

The final report reflects two years of modeling, analysis, and input from technical staff, subject-matter experts and policy makers. TPAC provided important technical input on a regular basis to shape the findings, and JPACT and the Metro Council provided policy direction and other considerations to shape the study.

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

- Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region's land use and transportation system.
- Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.
- Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.
- Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
    - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety) and
    - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).

- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specifically For Policy Makers

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

Specifically For Future Project Owners/Operators

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

ATTACHMENTS

Attachment 1: Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context August 2022
Attachment 2: Feedback from July 2022 TPAC Meeting
Attachment 3: JPACT & Council Workshop #2 (July 28, 2022) Summary August 2022

[For work session:]

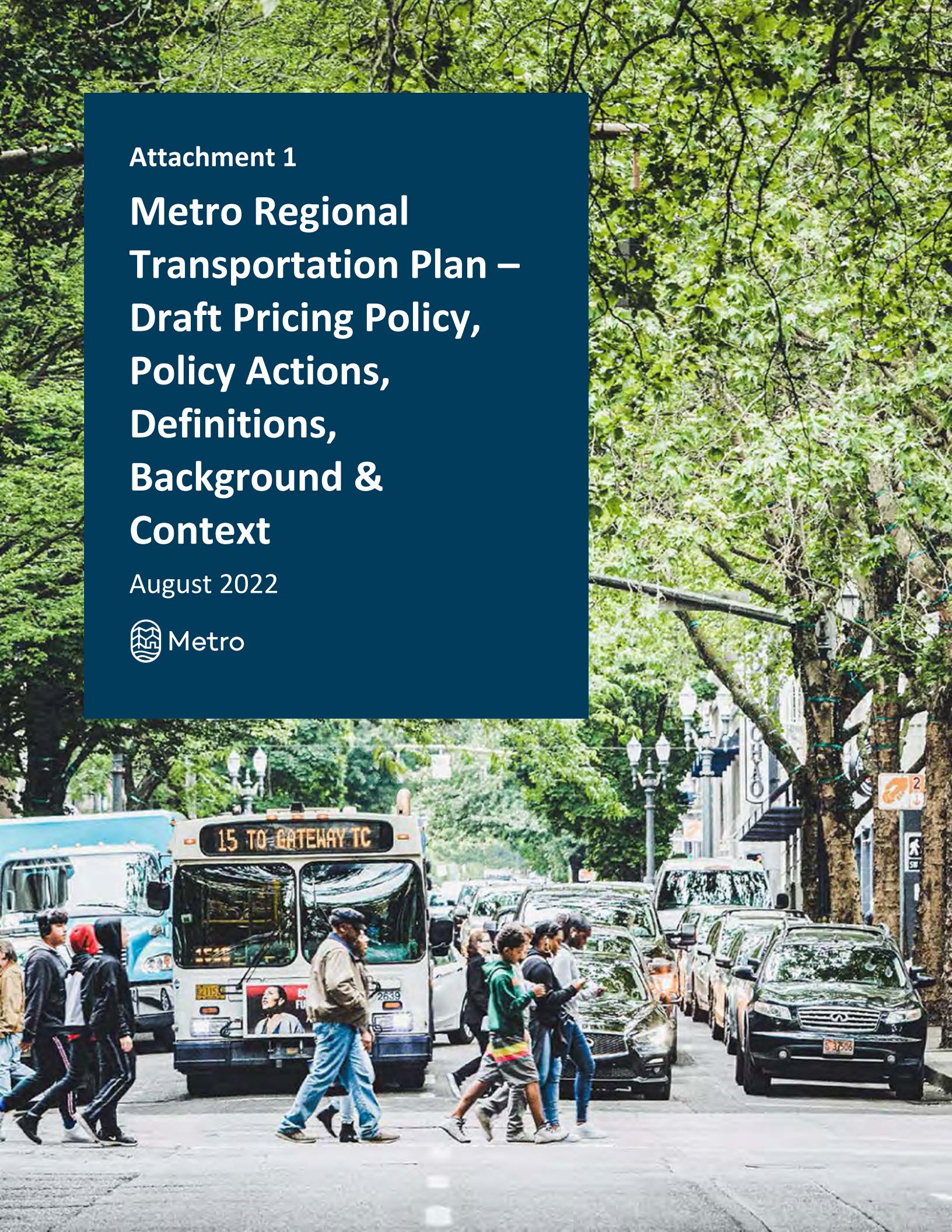
- Is legislation required for Council action? ☐ Yes ■ No
- If yes, is draft legislation attached? ☐ Yes ■ No

Attachment 1

Metro Regional Transportation Plan – Draft Pricing Policy, Policy Actions, Definitions, Background & Context

August 2022

Metro



3.2.5 Pricing Policies

With transportation pricing, our region can have better, faster transit, cleaner air, fewer hours sitting in traffic, and more equitable access to jobs and opportunities. Pricing programs will need to be carefully designed to ensure the process to develop them is equitable, revenue is reinvested equitably and to support regional goals, diversion on local streets is mitigated, and pricing strategies are interoperable throughout the region.

What is transportation pricing?

Transportation pricing is the use of a pricing mechanism, such as tolls or parking fees, to reduce traffic congestion and greenhouse gas emissions, encourage a shift to travel via different modes, a different route, or a different time of day, and raise revenue for transportation investments and mitigation for impacts resulting from pricing.

While parking pricing has proven to be an effective strategy in the region for many years, cordons, roadway pricing, and other pricing strategies are only beginning to be discussed and implemented as a strategy in the greater Portland region. However, these strategies have been effective in cities around the world for many leaders and government agencies in the Portland metro region recognized pricing as a needed, high-impact, tool in the 2018 Regional Transportation Plan (RTP) and other plans.[1]

Pricing Strategies

Pricing could include a range of tools, including:

VEHICLE MILES TRAVELED FEE

Drivers pay a fee for every mile they travel

CORDON PRICING

Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)

ROADWAY PRICING

Drivers pay a fee or toll to drive on a particular road, bridge, or highway

PARKING PRICING

Drivers pay to park in certain area

Each of these pricing strategies could vary by time of day, by area, by types of drivers on the road, and by income levels. Pricing strategies can also take the form of a "program" (i.e. parking pricing) or a "project" (i.e. the I-205 toll project).

[1] 2018 Regional Transportation Plan, TSMO Strategic Plan (2010), Climate Smart Strategy (2014), The Federal Congestion Management Process, 2021 City of Portland Pricing Options for Equitable Mobility Final Report, 2018 Oregon Department of Transportation Value Pricing Feasibility Analysis.

Figure 1 outlines which local, regional, and state agencies could potentially implement various types of pricing strategies based on Oregon state law. Other federal or local laws may provide additional guidance or restrictions on the use of pricing.

Figure 1 Pricing and Implementing Agency

Type of Pricing	Definition	Implementing Agency
Road User Charge / Vehicle Miles Traveled Fee	Drivers pay a fee for every mile they travel	State DOT, potentially local roadway authorities
Cordon Pricing	Drivers pay a fee to enter an area, like downtown Portland (and sometimes pay to drive within that area)	City, County
Roadway Pricing and Tolling	Drivers pay a fee or toll to drive on a particular road, bridge, or highway	Local Roads: City, County
		Highways and Freeways: State DOT
Parking Pricing	Drivers pay to park in certain areas	City, County, Transit Agency (park-and-rides)

Why is pricing an important strategy for our region?

Congestion is a problem in the Portland metro region. Changing travel patterns and a growing population mean more traffic and less freedom to travel reliably around the region. Congestion can also have significant economic, social, and environmental impacts.

- **Greenhouse gas emissions are on the rise.** Transportation in Oregon contributes to 42 percent of our greenhouse gas emissions. These emissions have increased 8% since 1990, while other sectors declined during the same time period.[2]
- **Congestion impacts our equity focus areas most significantly.** In the Portland region, the 10 lowest income and 10 highest minority neighborhoods experience more exposure to toxic air than the average neighborhood.[3]
- **Travel patterns for people and goods are unreliable.** The Portland metro region is the 11th most congested region in the country.[4] In 2021, people in the Portland metro region spent 52 hours stuck in traffic and freight accounted for 9.4 percent of off-peak regional freeway

[2] 2021 Pricing Options for Equitable Mobility Final Report.

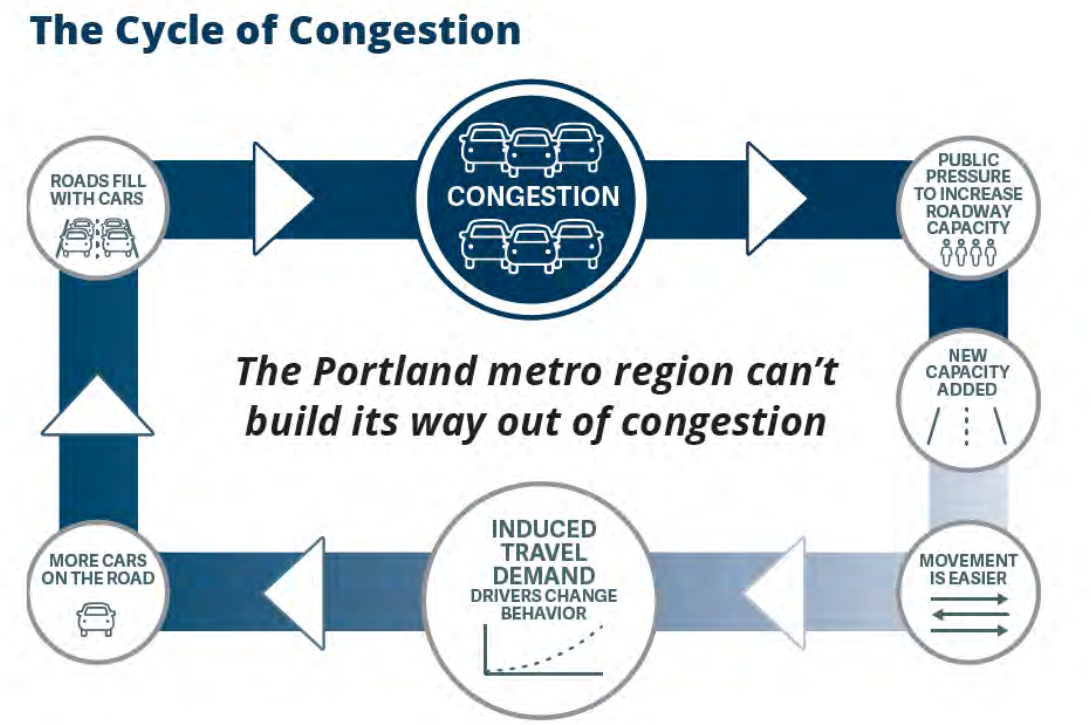
[3] 2012 Portland Air Toxics Solutions Committee Report and Recommendations, Oregon Department of Environmental Quality.

[4] 2021 Inrix Global Scorecard.

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

- **Our region is growing.** The Portland metro region is expected to grow by more than 600,000 new residents and 350,000 more jobs by 2040.[7]

Without pricing programs and policies in place, traffic volumes and congestion will continue to increase beyond supportable levels, impacting low-income populations and people of color, contributing to catastrophic climate impacts, and hurting our regional economy.



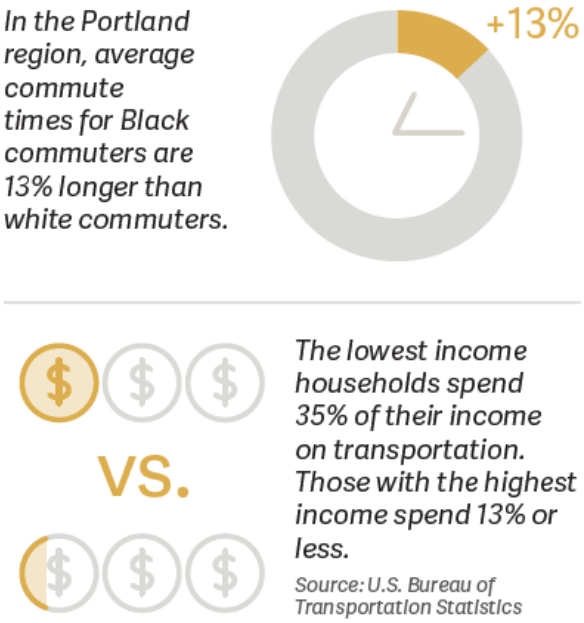
[5] 2040 Freight Existing Conditions Report, July 2021.

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

[7] 2018 Regional Transportation Plan.

How can pricing help our region?

Transportation investments in the Portland metro region have a long history of contributing to racial inequity and neighborhood displacement. Decades ago, public agencies planned and built new highways that cut through Black communities, splitting neighborhoods, and contributing to poor air quality, noise pollution and safety issues. Transit investments have also been made without complementary affordable housing strategies, leading to gentrification and further displacement.



Today, while the region's residents all feel the impacts of congestion, historic inequities in the transportation system amplify impacts on people of color and low-income people:

- Housing costs are increasing faster than incomes, making travel distances longer for people of color and low-income people.
- Communities of color and low-income communities have longer commutes that are made slower and more unreliable when roadways are congested.
- Major roads and freeways often run through communities of color and low-income communities, resulting in disproportionately high rates of air pollution and chronic illnesses

Pricing can be a key tool for jurisdictions as they look to meet state, regional, and local goals around mobility, climate, safety and equity.

Pricing that is designed and implemented through an equity and climate change lens has the potential to transform transportation in our region in a variety of ways. While pricing programs introduce new costs to users, they also lead to more efficient use of streets and highways and can help address current and historic inequities borne by people of color and people with low incomes.

Pricing has been shown to encourage use of transit or other modes and reduce overall vehicle miles traveled (VMT). Lower VMT results in decreased congestion, reduced travel times for personal vehicles, freight and buses, and lower greenhouse gas emissions. Pricing is more likely to be successful in areas where transit service is already well established and is improved in conjunction with pricing.

Pricing can also have positive impacts on safety. A combination of lower VMT as a result of pricing and reinvestment of pricing revenue in projects that increase safety can, in the long term, lead to decreases in crashes and injuries in and around priced areas.

Additionally, for many jurisdictions, pricing may be identified as a tool to raise revenue for specific projects and be a key element of a funding plan. This could include, for example, replacement of an aging bridge, or investments in multimodal infrastructure and transit service or amenities. However, for a pricing program to successfully meet state, regional, and local goals, pricing revenue must do more than simply fund specific infrastructure projects. To be most successful, pricing should:

- **Allocate revenue where it matters most.** If designed thoughtfully, pricing programs that have built equity into the program can introduce progressive fee structures and reinvest revenue in the people and places that have historically been, and continue to be, the most negatively impacted.
- **Reinvest revenue to support our region's goals.** Revenue collected from pricing programs can be reinvested to enhance transit service and access, safety improvements, and walking and bicycling networks. It can also be used to provide incentives and subsidies to increase the number of people biking, walking, and taking transit for more trips.

With pricing our region can have better, faster transit, cleaner air, fewer hours sitting in traffic, and more equitable access to jobs and opportunities.

Benefits to Freight and Businesses

Pricing strategies can help freight and businesses succeed by reducing congestion on highways and local roads:

- Pricing can benefit freight, especially truck transportation, as it supports a more reliable system.
- Pricing can encourage people to use other forms of transportation to travel and leave highways open for people and businesses, like freight, who do not have other options.
- Pricing can support lowered cost of doing business – time is money.

Revenue Reinvestment

Equitable revenue reinvestment is a critical consideration from the outset of a pricing program. Reinvestment strategies must be guided by the purpose of the program, the expected costs and benefits, and input from community members impacted by the program. Revenue reinvestment should be focused on neighborhoods that do not have or could lose access to the priced area. Increasing access to the priced area, especially for places with limited access today or places that would see reduced access without reinvested revenues, should be a focus.

Key principles to consider related to revenue reinvestment include:

[8] 2018 Regional Transportation Plan.

- All revenues collected through the pricing program should be reinvested in a manner that helps meet state, regional, and local goals related to reductions in greenhouse gas emissions and congestion while improving mobility and safety. Reinvestment should be prioritized in areas designated as equity areas most affected by pricing programs.
- Revenue should be reinvested in the area in which it is collected.
- Revenue should not be reinvested in infrastructure solely for single-occupancy vehicles.

Revenue could be reinvested in several ways (Figure 2). Implementing agencies will need to consider any state constitutional restrictions to revenue reinvestment, or other limitations based on federal or state funding or program approvals, based on the type of pricing program established.

Figure 2 Potential Options for Revenue Reinvestment

Category	Description	Target
Transit		
Infrastructure & speed and reliability improvements	Improved facilities, stops, passenger amenities, transit priority treatments, and similar improvements	Regional In equity zones or direct benefit to
Operation and maintenance	Operation and maintenance of existing and future transit assets and services	Regional
Active Transportation		
Access to priced area	Improved bike, pedestrian, or micromobility access to transit or priced area directly	Regional From/to equity zones
Neighborhood access	Improved bike, pedestrian, or micromobility access to transit or neighborhood activity centers such as shopping centers and employment hubs	From equity zones to transit or neighborhood activity centers
First/last mile to key employment hubs	Improved bike, pedestrian, or micromobility access to employment hubs from transit	Regional
Mode Shift and Single Occupancy Vehicle Alternative Programs		
Commuter Credits	Benefit to users of the pricing system who swipe their transit card during peak hours rather than drive	Regional
Transit subsidy	Free or discounted transit pass or cash on transit card	Regional

	Receive a higher transit subsidy than general regional population	Low-income populations and people of color
Other programs	Electric vehicle (EV) carshare subsidy, bikeshare subsidy, micromobility subsidy, carpool benefit, benefit to drivers of EV vehicles for up to 10 years	Low-income populations and people of color

Potential Revenue Opportunities and Limitations

Depending on the pricing model, the use of revenue generated from a pricing program may be subject to legal limits. For example, Oregon Constitution Article IX Section 3a limits the use of revenue from taxes on motor vehicle use and fuel. The principle underlying this language is that special taxes paid only by highway users should be used only for highway purposes. Whether a particular pricing model is subject to this constitutional restriction is determined by Oregon courts on a case-by-case basis. Recently, the Oregon Supreme Court concluded that Article IX section 3a's limit on use of tax revenue does not apply to a privilege tax imposed on vehicle dealers for the privilege of engaging in the business of selling taxable motor vehicles at retail. The Court found that the privilege tax was not based on the status of motor vehicle ownership, but rather on the activity of selling motor vehicles. Jurisdictions considering pricing should review all potential legal limits and structure the pricing model with these limits in mind.

What state and regional pricing work is underway?

Pricing strategies are being considered in the greater Portland Metropolitan Region, within the City of Portland, and along the Multnomah Falls and the Waterfall Corridor area. They are being used to combat traffic congestion and greenhouse gas emissions. This section provides a high-level overview of statewide legislation and rulemaking related to pricing and describes how the revenue from pricing is intended to support infrastructure in the region.

State Legislation & Rulemaking

House Bill 2017

House Bill 2017 invested millions of dollars to improve Oregon's transportation network. Part of that funding was allocated to tolling. This directed the Oregon Transportation Commission to implement traffic congestion tolls on I-5, I-205, and in the Portland Metro region.[9]

House Bill 3055

House Bill 3055 created flexibility in allocating $30 million per year of funds to projects listed in House Bill 2017, I-5, Boone Bridge, and toll program implementation. HB 3055 directed that tolling should be used to manage congestion, raise revenue, make improvements or fund efforts on the tollway and on adjacent, connected, or parallel highways, and minimize and mitigate impacts to underrepresented and disadvantaged communities. It also required that an equitable tolling strategy be implemented before tolls are assessed, and for a low-income toll report to be provided to the Joint Transportation Committee and Oregon Transportation Committee.[10,11]

Low-Income Toll Report

[PLACEHOLDER – will be adopted by the OTC sometime this fall]

2022 Oregon Highway Plan Toll Policy Amendment

[PLACEHOLDER – will be adopted by the OTC sometime this fall]

Climate-Friendly and Equitable Communities

Parking reform is part of the Oregon Land Conservation and Development Commission's Climate-Friendly and Equitable Communities (CFEC) rulemaking. The reform decreases required parking costs for new development applications near frequent transit and for certain development types by unbundling parking packages in developments, implementing parking maximums, and incentivizing

[9] https://www.oregon.gov/odot/tolling/Pages/About.aspx

[10] https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureAnalysisDocument/61936

[11] https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB3055/Enrolled

active transportation travel options. This parking mandate reform aims to decrease congestion by discouraging driving and parking. This rule was enacted for new development as of July 2022 and will be enacted in 2023 for existing developments.[12] This reform would also require that parking lots include solar power or trees, pedestrian-friendly infrastructure, and 50% of new residential parking spaces equipped with electric vehicle charging.[13]

Figure 3 Regional Mobility Pricing Project Map

Pricing Projects and Committees in the Portland Metro Region

ODOT: I-205 Toll Project

ODOT is planning to toll drivers on I-205 near the Abernethy and Tualatin River Bridges. The revenue from these tolls will be used to continue the I-205 Improvement Project past Phase 1A, which aims to decrease congestion, reduce greenhouse gas emissions, increase active transportation, and provide facilities that are resilient to earthquake damage As part of a 2018 RTP amendment for this project, ODOT agreed to a series of commitments that would address regional concerns related to the I-205 toll project. See Chapter 8 for additional information.

Regional Mobility Pricing Project

The purpose of the Regional Mobility Pricing Project (RMPP) is to use congestion pricing on I-5 and I-205 to manage traffic congestion on these facilities in the Portland, Oregon metropolitan area in a manner that will generate revenue for transportation system investments (Figure 3). The fees would vary depending on time of day, income level, and type of car and would help fund critical multimodal projects in the region.[14]

[12] https://www.oregon.gov/lcd/CL/Documents/CFECOverviewImplementation.pdf

[13] https://www.oregon.gov/lcd/LAR/Pages/CFEC.aspx

[14] https://www.oregon.gov/odot/tolling/Pages/I-5-Tolling.aspx

I-5 Bridge Replacement

The Interstate Bridge Replacement Program will toll drivers crossing I-5 as part of the funding to finance a replacement bridge on I-5 between Portland and Vancouver. The new bridge will address congestion, earthquake vulnerability, safety, impaired freight movement, inadequate bike and pedestrian paths, and limited public transportation. Revenue from the tolls will be used to fund construction, maintenance, and operation of the bridge and associated improvements.[15]

ODOT Equity and Mobility Advisory Committee

The Oregon Department of Transportation (ODOT)'s Equity and Mobility Advisory Committee (EMAC) was created to directly advise the OTC and ODOT on how tolls on Interstate 205 (I-205) and I-5, in combination with other demand-management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects. The purpose of the committee is to addresses four equity pillars: full participation of impacted populations and communities, affordability, access to opportunity, and community health. EMAC goals specify that equity and mobility strategies must go beyond pricing revenue and show reinvestments into better functioning transportation infrastructure and a decrease in personal car usage. In July 2022, EMAC shared its recommendations on shaping an equitable toll program with the Oregon Transportation Commission.

PBOT Pricing Options for Equitable Mobility

Portland Bureau of Transportation (PBOT)'s Pricing Options for Equitable Mobility (POEM) task force explored if and how new pricing strategies could be used in the City of Portland to improve mobility, address the climate crisis, and advance equity for people historically underserved by the transportation system. . In October 2021, Portland City Council accepted the POEM Task Force final recommendation report. This recommendation report includes principles of pricing for equitable mobility, nearer-term pricing strategies, longer-term pricing recommendations, and a suite of complementary strategies to advance alongside pricing. T Pricing Strategies explored through POEM included prices on parking, prices on vehicle-based commercial services (e.g., private for-hire trips and urban delivery), highway tolling, cordons or area pricing, and road usage or per-mile charges.[16]

[15] https://www.interstatebridge.org/faq

[16] https://www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem

Multnomah Falls and the Waterfall Corridor Timed-Use Permits

While outside of the metropolitan planning area, timed-use permits at Multnomah Falls and the Waterfall Corridor provide a useful example of innovative parking pricing. ODOT, Oregon State Parks, U.S. Forest Service, and Multnomah County are requiring that personal vehicles pay for a timed-use permit to access Multnomah Falls and federal lands adjacent to the Waterfall Corridor. The permits are required from May 24 to September 5, 2022, during peak hours (9am to 6pm) when data has shown crowds are busiest. The parking pricing strategy is used to limit the number of personal vehicles that enter the parking lot for environmental, safety, and emergency response reasons. The fee does not apply to those entering the park through active transportation modes, before or after peak hours, and same-day passes. The fee is used to pay for the online pricing system and does not generate additional revenue for other improvements. The Waterfall Corridor Timed-Use permits apply to visitors that exit I-84 from exit 28 through exit 35, while the Multnomah Falls timed-use permit applies to visitors to Multnomah Falls.[1]

Federal Pricing Programs

Section 129 and the Value Pricing Program are examples of pricing strategies have worked. Since pricing is new to the Portland area, these two federal examples show initial successes, the value of pursuing pricing, and how pricing programs can be amended over time.

Section 129

Section 129 of Title 23 of the U.S. Code provides the ability to toll Federal-aid highways in conjunction with construction, reconstruction, or other capital improvements. Flat rate tolling and variable pricing strategies are authorized for Section 129 facilities. There are some limitations to what facilities may be included.[17]

Value Pricing Pilot Program

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

[17] https://www.fhwa.dot.gov/ipd/tolling_and_pricing/tolling_pricing/section_129.aspx

What did Metro learn from the Regional Congestion Pricing Study?

In 2021 Metro completed the Regional Congestion Pricing Study (RCPS). Directed by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council in the 2018 RTP, the study evaluated a variety of pricing strategies to better understand if the region could benefit from pricing. The study found that pricing can be an effective strategy for reducing drive-alone trips and overall VMT, but its impacts can vary widely by geography and demographics, as well as by what specific strategy is implemented and how it is implemented.

Metro used its travel demand model to conduct in-depth modeling and analysis to help regional policymakers understand the potential performance of different types of pricing tools (VMT fee, cordon, parking, and roadway pricing). Each scenario was analyzed for how well it performed relative to the four regional priorities (safety, equity, congestion, and climate) using performance metrics grounded in the 2018 RTP.

Summary of Key Findings

The RCPS demonstrated that pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 RTP, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes.

All four types of congestion pricing could help address congestion and climate priorities. All eight scenarios that were tested reduced the drive alone rate, vehicle miles traveled, and greenhouse gas emissions, and increased daily transit trips. In fact, the projected improvements were comparable to modeled scenarios with much higher investment in new transportation projects. However, the geographic distribution of benefits, impacts, and costs varied by scenario.

Traffic diversion, travel time savings, and costs to travelers varied by location and by congestion pricing tool. For example, the two roadway pricing scenarios, which evaluated a toll on all the region's freeways, identified significant traffic diversion onto the arterial network, even as volumes and delay on the freeways fell. Without changes, some scenarios would have disproportionate impacts on equity communities and key geographies.

Geographic distributions of benefits and costs can inform where to focus investments and affordability strategies. In-depth analysis will be necessary to understand benefits (who and where) and costs (who and where) of any future projects. The study also identified tradeoffs for implementing pricing scenarios. Overall regional transportation costs and individual traveler costs varied by scenario. All eight scenarios that were tested increased the overall cost for travel for the region, but some scenarios spread the costs widely while others concentrated them on fewer travelers. Those that spread the costs also had the highest overall cost for travel in the region and the highest revenue potential. Higher overall transportation costs equal higher revenue, which can allow for investment in improvements to address safety and equity concerns.

Pricing and Equity

Today's transportation system puts more burdens on people of color and people with low incomes. Gas taxes and motor vehicle fees are not tied to a driver's ability to pay. Households with lower incomes spend 22 percent more of their income on transportation than households with higher incomes. People of color and people with low incomes are more likely to use transit and more likely to live further from employment centers. They may also need to commute between more than one job. Increasing congestion negatively impacts transit speed and reliability as buses sit in traffic. This increases commute times for transit users. Federal and state funding prioritizes auto infrastructure over investment in transit, favoring people with higher means and access to a vehicle.

Today's Transportation Funding is Inequitable

Pricing can improve or harm equity in the region. A pricing program designed with the goal of improving equity, rather than attempting mitigations later, has the potential to produce positive outcomes. Outcomes are determined by the way funds are collected and where and in whom they are reinvested. The Revenue Considerations and Policy sections below describe methods that can be used to lead to equitable outcomes and strategic reinvestment into pricing programs. The Regional Congestion Pricing Study found that without changes some scenarios harmed equity by increasing costs and decreasing access. A thoughtful and community-focused approach will be necessary as our region continues to explore pricing options.

3.2.5.1 PRICING POLICIES

Pricing policies apply to the planning, implementation, monitoring and evaluation of pricing programs and projects in the region, as defined in Chapter 3.1 (Regional Transportation System Components).

Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.
Policy 2	**Equity**: Center equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety**: Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.
Policy 4	**Diversion**: Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.
Policy 5	**Climate and Air Quality**: Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.
Policy 6	**Emerging Technologies**: Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

Pricing Policy 1. Mobility: Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.

[Placeholder for background/context]

Action Items:

1. Set rates for pricing at a level that will manage congestion, reduce VMT per capita, and improve reliability on the priced facility and in areas affected by diversion.
2. Collaborate with relevant state, regional, and local agencies and communities when setting, evaluating, and adjusting program or project specific goals.
3. Reinvest a portion of revenues from pricing into modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction per capita, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
4. Identify opportunities to partner with other agencies to fund or construct transit, bike, and pedestrian improvements. Work with transit agencies and other jurisdictional partners, including consideration of opportunities identified in the High Capacity Transit Strategy and Regional Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by pricing revenues due to revenue restrictions.
5. Consider non-infrastructure opportunities to encourage mode shift and reduce VMT per capita, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, discounts or exemptions for people with low-income or other qualifying factors based on equity analysis.

Pricing Policy 2. Equity: Center equity and affordability into pricing programs and projects from the outset.

[Placeholder for background/context]

Action Items:

1. Conduct general public engagement in a variety of formats, including formats that accommodate all abilities, all levels of access to technology, and languages other than English. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
2. Engage equity groups, people with low-income, and people of color in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
3. Use a consistent methodology across implementing agencies for defining equity groups and equity areas for pricing programs and projects, including but not limited to the methodology used for establishing the Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and equity areas should also be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
4. Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
5. Provide a progressive fee structure which includes exemptions, credits, or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income, and minimize barriers to qualification by building on existing programs or partnerships where applicable. Target outreach for enrollment in a discounts, credits, or exemptions in equity areas and communities with higher-than-average shares of people with low income and people of color.
6. Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
7. Reinvest a portion of revenues from pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.
8. Enforcement of pricing and fine structures for non-payment should be designed to reduce the potential for enforcement bias and to minimize burdens on people with low incomes.

Pricing Policy 3. Safety: Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.

[Placeholder for background/context]

Action Items:

1. Collaborate with relevant state, regional, and local agencies and communities when identifying traffic safety impacts and mitigations associated with pricing.
2. Use a data-driven approach to identify potential traffic safety impacts on the priced system and in areas affected by diversion both during and after implementation of pricing programs and projects; monitor with real-time data after implementation.
3. Context-specific monitoring and evaluation programs should be conducted by implementing agencies in coordination with partner agencies and be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
4. Adjust safety strategies based on monitoring and evaluation findings.
5. Reinvest a portion of revenues on the priced system and in areas affected by diversion to manage safety issues caused by pricing programs and projects and to improve safety, for example, through investments in transit, bike, and pedestrian improvements.
6. Pricing programs and projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4

Pricing Policy 4. Diversion: Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.

[Placeholder for background/context]

Action Items:

1. Collaborate with relevant state, regional, and local agencies and communities when identifying diversion impacts and mitigations associated with pricing.

2. Use a data-driven approach to define and identify diversion impacts both during and after implementation of pricing programs and projects; monitor with real-time data after implementation.
3. Evaluate localized impacts of diversion including factors such as VMT per capita, VMT per capita in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
4. Context-specific monitoring and evaluation programs should be conducted by implementing agencies in coordination with partner agencies and be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
5. Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
6. Reinvest a portion of revenues into areas affected by diversion caused by pricing programs and projects.

Pricing Policy 5. Climate and Air Quality: Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.

[Placeholder for background/context]

Action Items:

1. Set rates for pricing at a level that will reduce greenhouse gas emissions and improve air quality by managing congestion and reducing VMT per capita on the priced system and in areas affected by diversion.
2. Identify localized air pollutants and greenhouse gas emission impacts due to pricing and identify strategies for mitigation.
3. Reinvest a portion of revenues from pricing into modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT per capita reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
4. Develop and implement pricing so that it addresses and supports the RTP's Climate Smart Strategy policies, including through the Congestion Management Process.

Pricing Policy 6. Technology and User Experience: Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

[Placeholder for background/context]

Action Items:

1. Coordinate technologies and user-friendly designs across pricing programs and projects to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
2. Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
3. Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.

DEFINING KEY TERMS

Key terms will be included in the RTP glossary.

Pricing: Motorists pay directly for driving on a particular roadway or for driving or parking in a particular area. Pricing includes pricing different locations using different rate types, such as variable or dynamic pricing (higher prices under congested conditions and lower prices at less congested times and conditions), amongst other methods. Pricing within the Portland metropolitan context could include the following methods and pricing strategies. Methods and strategies can be combined in different ways, such as variable cordon pricing or dynamic roadway pricing. Different types of pricing can be implemented in coordination with each other to provide greater systemwide benefits. Pricing can be implemented at the state, regional, or local level.

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

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

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

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

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

Flat Rate Fee (Toll): A flat rate fee, also known as a toll, charged by a toll facility operator in an amount set by the operator for the privilege of traveling on said toll facility. Tolling is a user fee system for specific infrastructure such a bridges and tunnels. Toll revenues are used for costs associated with the tolled infrastructures. This tool is used to raise funds for construction, operations, maintenance, and administration of specific infrastructure. Flat rate tolling can also serve as a method for congestion management, though it is not responsive to changing conditions or time of day. Additionally, flat rate tolling cannot be used for congestion pricing programs or projects authorized by the Value Pricing Pilot Program or Section 166 on interstate highways under Federal law.

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

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

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

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

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

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

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

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

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

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

- **Goal 4: Reliability and Efficiency, Objective 4.6 Pricing –** Expand the use of pricing strategies to improve reliability and efficiency by increasing transportation options, managing congestion, and reducing VMT per capita consistent with regional VMT per capita reduction targets. ~~manage vehicle congestion and encourage shared trips and use of transit.~~
- **Safety and Security Policies (3.2.1.4)**

  - **Policy 4**. Increase safety for all modes of travel for all people through the planning, design, construction, operation, pricing and maintenance of the transportation system, with a focus on, but not limited to, reducing vehicle speeds .

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT per capita, and increasing transportation options through investments in transit services and increased access to transit and bike and pedestrian infrastructure. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT per capita ~~and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies ~~adequately address arterial or throughway deficiencies and bottlenecks~~.
  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road Usage Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

Review Chapter 8: Moving Forward Together for future updates

In the 2018 RTP, Section 8.2 identified mobility corridors recommended for future corridor refinement plans. The descriptions of many of these corridors referenced pricing in a variety of contexts and were unclear on how or whether pricing might help address the goals of the RTP. A comprehensive look at the corridor refinement planning work identified in Section 8.2: Planning and Programs is needed to recommend updates in a future round of review. Staff will also consider

what additional planning activities could be identified in Chapter 8 to address next steps for pricing at a regional level. This could include planning for a regionally coordinated pricing system, criteria for when pricing should be considered on a corridor or in an area, guidance for development and implementation of pricing, and/or system-wide cumulative impacts from multiple pricing systems,

Continue development of the Finance Chapter of the RTP, including incorporation of pricing into the financial forecast

This work is underway and will be shared with partners in Fall 2022.

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

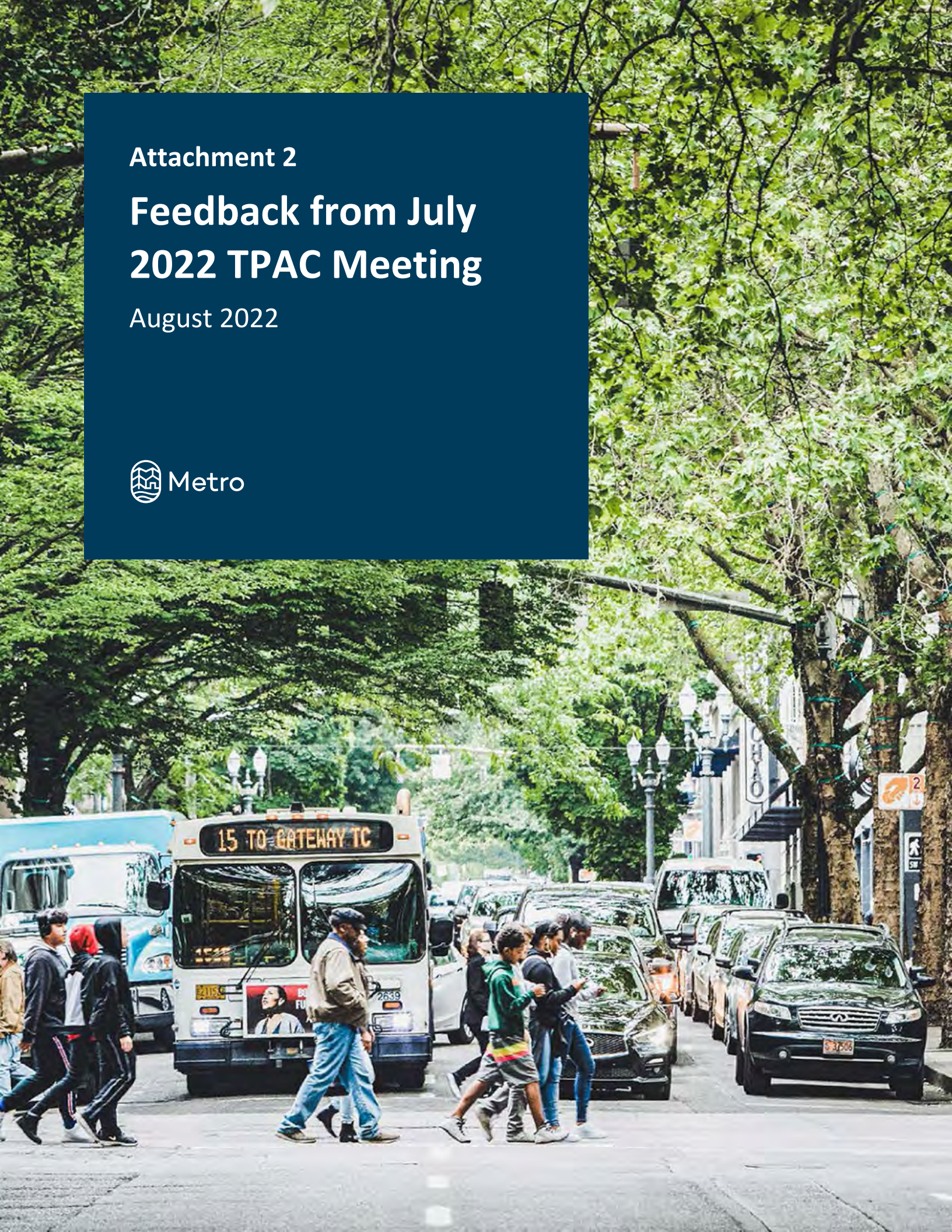
Continue to coordinate with other pricing policy work at the state level, particularly the Oregon Highway Plan Toll Policy Amendment and the Oregon Transportation Plan update.

Attachment 2

Feedback from July 2022 TPAC Meeting

August 2022

Metro



This document summarizes the feedback on draft 2023 RTP congestion pricing policies that was collected from TPAC members following the July 13, 2022 TPAC meeting, identifying whether feedback has been addressed in revised language, will be addressed in future revisions, will be addressed in the pricing section of Chapter 3, or will be shared with other Metro staff for consideration as other 2023 RTP update work moves forward.

Feedback Across Policies

What We Heard

- Update language –
    - Change references to agencies from "regional and local agencies and communities" to "relevant state, regional, and local agencies and communities"
    - Change general language from "congestion pricing" to "pricing" except when explicitly referring to pricing intended to manage congestion, and update related definitions
    - Change from "VMT" to "VMT per capita" where relevant
    - Change from "net revenue" to "revenue"
    - Change "local partners" with "jurisdictional partners"
    - Change references to modal alternatives to more clearly specify meaning
- Connect lessons learned from RCPS to the policies
- Include a description under each policy to provide context and connection to the RCPS
- Provide more clarification on types of pricing and when jurisdictions might implement them
- Remove references to specific data or geographies
    - Regional High injury corridors
    - Equity Focus Areas
- Remove references to local roads when not specifically referencing a local functional classification
- Clarify references to areas impacted by pricing and remove references to within one mile of a priced facility
- Clarify programs and projects to ensure they are differentiated

How / When We're Addressing

- Language updates have been made for regional and local agencies, pricing, VMT, net revenue, jurisdictional partners, and specify modes and modal alternatives

- Language about areas impacted by pricing programs or projects, including references to local roads, has been updated to provide more clarity yet remain flexible.
- Added definitions to clarify the difference between pricing programs and pricing projects. Made references to pricing programs and projects more consistent throughout the document.
- Introduction to pricing section of Chapter 3 addresses types of pricing and which agencies could implement.
- Additional descriptions after each policy will be added after the September committee meetings to provide helpful information and more explanation on policy intent, including connecting the policies back to the RCPS.
- Prescriptive references to regional high injury corridors and Equity Focus Areas have been removed or altered to address feedback and provide more flexibility.

Structure of Action Items

What We Heard

- Consolidate actions as one section beneath all of the policies to remove redundancies across the lists of action items
- Provide more clarity on timing and responsibility of actions
- Number the action items

How / When We're Addressing

- Action items have been changed from bullets to numbers
- Action items will continue to be nested under the policy statements to keep consistency with other sections of Chapter 3 of the RTP. A callout out box in the introduction to Chapter 3 will be developed after the September committee meetings to further address why some system policies in Chapter 3 have actions and some do not, and to clarify how actions and policies relate to the goals and objectives in the RTP.
- Action items are intended to be flexible and provide direction on how policies can be met; they are meant to apply across different types of pricing programs and projects, specifics about timing and responsibility will be unique to each application.

Revenue Reinvestment

What We Heard

- Create more specificity around revenue reinvestment for mitigation versus reinvestment in the system
- Include revenue reinvestment as its own policy.

- Provide more guidance on the amount of revenue invested in different areas.

How / When We're Addressing

- Specific changes to revenue action items have been made where relevant.
- Revenue reinvestment has not been separated into a new policy; the revenue reinvestment action items remain under each existing policy as appropriate.
- Revenue reinvestment has been included as a section in the chapter introduction. This will include a table that provides examples of how to reinvest revenue. Specific revenue reinvestment strategies will need to be tailored to each pricing program and project.

Mobility Policy

What We Heard

- Policy definition should clearly define the purpose of mobility and the importance of the transportation network and programs Modify language to include improving reliability, and be more specific about what "modal alternatives" means.
- Discuss how transit is coordinated around pricing projects. Ensure that the pricing revenue is directed to help address impacts from pricing.
- Eliminate the requirement that pricing leads to VMT reduction on the priced facility. Congestion pricing is to reach a congestion performance and overall emissions, not necessarily VMT.

How / When We're Addressing

- Policy language was updated to clarify the purpose of the policy.
- "Modal alternatives" has been replaced with specific references to transit, biking, and walking.
- Policies and actions have been updated to clarify coordination with transit and reinvestment of revenues in transit-supportive investments.
- Reduction of VMT remains in the language, consistent with state and regional goals around mobility, and other related work. For example, EMAC recommended action #1 includes reducing VMT per capita, and the OHP toll policy amendment policy 6.4.A calls for road pricing to encourage VMT reduction.

Equity Policy

What We Heard

- Change from "integrate equity" to "center equity" in the policy.
- Consider not only the inclusion of equity at the outset, but ensuring impacts are equitably distributed across the population.

- Outreach for exemptions and discounts should be targeted to areas with shares of people with low-income and people of color.
- Adjust references to eligible populations for discounts and exemptions.
- The policy should encourage evaluation but not guarantee exemptions or discounts.
- Intertwine the structure of EMAC and POEM and how they were used to add ODOT pricing and Portland pricing respectively.
- Add something specific about designing enforcement so that it doesn't add additional burdens (i.e. have income based ticket amounts or options to address fines that people may not be able to pay)

How / When We're Addressing

- Changed the start of the policy from "Integrate Equity" to "Center Equity"
- References to eligible populations for discounts and exemptions have been adjusted.
- Language has been added to specify targeted outreach.
- The inclusion of exemptions and discounts as part of a progressive fee structure remains in the updated language. Both EMAC and ODOT's low-income toll report recommend exemptions or discounts.
- EMAC and POEM will be referenced in the introduction to the pricing policy section of Chapter 3.
- An action item specific to enforcement has been added.

Safety Policy

What We Heard

- Reframe policy to include "and in areas affected by diversion"
- Add language to the effect of developing context specific monitoring and evaluation programs
- Specify that the evaluation should be conducted by the implementing agency
- Consider the difference between mitigation and long-term reinvestment

How / When We're Addressing

- Language to specify where safety evaluation and mitigation measures should take place has been refined.
- Language regarding context specific monitoring and evaluation has been refined.
- Clarity about implementing agency responsibility for evaluation has been added

Diversion

What We Heard

- Define a level of diversion which warrants evaluation.
- Change "diversion" to "rerouting"
- Clarify responsibilities for monitoring and evaluation.

How / When We're Addressing

- Chapter 3 states that whenever diversion exists, it will be studied. The policies will not define a threshold at which diversion will need to be mitigated or addressed; that threshold will vary by project and program.
- The policy will continue to use the term "diversion," which is defined in the document.
- The language on monitoring and evaluation has been revised to reflect need for implementing agencies to work with partners.

Climate Policy

What We Heard

- Strengthen the language around air quality and on localized impacts that could result from diversion
- Include reliable and efficient travel times in action items
- Clarify references to climate goals and Climate Smart Strategy

How / When We're Addressing

- Air quality has been added to the policy and action items.
- Policy does not indicate how much revenue should be spent on any particular project element and does identify areas where revenue should be spent.
- Reliable and efficient travel times are included in the mobility policy, and are not included in the climate policy.
- Language around climate goals and climate smart strategy has been refined.

Emerging Technology Policy

What We Heard

- Change policy and action item references from "emerging technologies" to "technologies"
- Focus this policy more on user experience.

- Remove action items that are too specific related to the process of technology selection and reviews of existing laws.

How / When We're Addressing

- Reframed policy to focus on technologies and user experience.
- The last two action items have been removed.

Other Impacted Policies in the RTP

What We Heard

- Create a greater connection between the Climate Smart Strategy policies and pricing
- Divide policy five of the Climate Smart Strategies policies into two policies to more clearly define pricing as a tool separate from technology.
- Explain how pricing is a tool support safety
- Remove changes to Safety & Security Policy 4, as they change the focus of the policy from reducing vehicle speeds overall to diversion.
- Regional policies do not reflect local needs for all roads and for expansion of the system.
- Consider merging the two identified Region Motor Vehicle Network Polices
- Do not implement pricing where there are not alternative options

How / When We're Addressing

- Climate Smart Strategies team will consider further refining policies to clarify and increase connection with pricing, and consider a new policy on pricing separate from technologies.
- Pricing supports safety though reducing VMT and reinvesting in alternatives to driving. It also supports safety through diversion mitigation strategies. These items have been more clearly defined and will be reiterated in policy introductions (to be written, see above).
- Removed changes to Safety & Security Policy 4.
- Regional Motor Vehicle Network Policies 6 and 12 have been slightly amended. The intent of these policies is not to restrict the ability for areas of growth from completing needed street network connections, but to include analysis on where pricing and other tools can replace or supplement capacity increases. The proposed language is consistent with other state and regional policy.
- Language related to the greater success of pricing in areas where transit service is already well established and is improved in conjunction with pricing has been added to the pricing section introduction.

Coordinated Approach and Vision

What We Heard

- Further discuss the impacts of the congestion pricing policy and how we can create a regionally coordinated priced transportation system

How / When We're Addressing

- Discussions about a regionally coordinated priced system and further implementation guidance will be provided in Chapter 8 after the September committee meetings.

TPAC Feedback

Clackamas County

July 2022

July 29, 2022

Alex Oreschak
Alex.Oreschak@oregonmetro.gov

Dear Alex -

Thank you for the opportunity to provide comments related to the Metro Regional Congestion Pricing Policies. Attached is the Worksheet which contains specific recommended language changes to the Congestion Pricing policies and actions. This cover letter is to provide a high level overview of our concerns as well as to emphasize specific changes.

1. We support having a unique section in Chapter 3 to include policies specifically related to Congestion Pricing. This section should connect the lessons learned from the Regional Congestion Pricing Study (2021) to the policies. The Background should describe the types of potential pricing and must be clear who will have jurisdiction over these different types of pricing and the revenue that is generated. In addition, it should include discussion about how and when the various agencies should use these policies to guide their programs.

2. While we support the concept of the six specific policies, we have included proposed edits several of the policies. The edits simplify the policies as well as removed any "actions" that had been included within the policy statement. A description should be included under each policy, providing some context and connection to the Regional Congestion Pricing Study.

3. All **Actions** need to be grouped together at the end of the **Policies.** This will remove duplication, improve clarity and add emphasis. As a part of these edits, we recommend removing specific references to Metro Equity Focus Areas and the Metro High Injury Corridors as tools for direct funding. Equity and safety should be specifically addressed within the context of the Congestion Pricing program, and specific investments should be identified within that context.
   Overall, the **Actions** should be simplified, and should include information on when they should be used.

4. With respect to the updates to the other RTP Goals and Objectives, staff has the following comments:
   a. Goal 4 Objective 4.6 – The addition of "support additional development in 2040 growth areas" does not fit with the category of "reliability and efficiency." Those words should be removed.
   b. Safety and Security Policy 4 – The addition of the language to pricing is confusing and creates a complicated sentence. It takes a policy that had originally been focused on "reducing speeds" as a tool to address safety, but then adds in minimizing diversion from priced facilities. Perhaps a completely separate policy is needed.

c. Regional Motor Vehicle Network Policies (3.5). It is difficult to review these policies outside of the context of the other existing policies. Proposed language changes to the recommended edits are below
    i. Policy 6 – The initial proposed edits change language from "consider" to a more directive word of "use". The reference to Policy 12 is unnecessary. Clackamas County proposes this language: *"Consider use of congestion pricing to manage congestion, reduce VMT and raise revenue when one or more lanes are being added to throughways. Transit service and facilities for alternative modes should be available and be improved with the implementation of congestion pricing."*

    ii. Policy 12 – The proposed changes to Policy 12 are unnecessary for implementation of the Congestion Pricing policies. We recommend that no changes be made to Policy 12.

Thank you for this opportunity to comment during the development of these important policies. We look forward to continuing to engage and provide additional input at future TPAC and JPACT meetings.

Sincerely,

Karen

Karen Buehrig

Long Range Planning Manager
Clackamas County

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Agency name: ___Clackamas County – Long Range Planning staff_____

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Comments on Section 3.2.5 Congestions Pricing Policies

For the Background section,

- discuss that there are various types of "Pricing" extending from Tolling that is used to fund specific infrastructure to Congestion Pricing that can be applied in a variety of ways, Cordon, Parking, Roadway and VMT.
- It is important to emphasize that depending on what is being priced, there are different owners of facilities and various organizations that will be making decisions on how to use the revenues. The table created by Alex is helpful.
- Describe when, where and how the policies should be used, especially in light of the various types of pricing. Describe how these policies fit with the State guidance and projects on the Interstate and Highways. Talk about how Portland, and other jurisdictions use pricing.
- Add description that Roadway pricing - Tolling is primarily used to raise revenues to pay for roadway improvements, which is diferent from Congestion Pricing.

The various Chapter 3 Policy Sections do not all have Actions associated with each Policies. The list of Actions is significant detail and should be shortened. Group the Actions together at the end of the section to avoid repetition and to be more direct.

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What specific changes would you like to see to improve the proposed policy language?

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

Need to be clear on what types of pricing projects this should apply to – regional projects vs parking policy.

Discuss roadway pricing – Tolling and Congestion pricing. Focus of this policy is on Congestion Pricing

Revised Draft Congestion Pricing Policy Language Worksheet

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

There should be additional description after the Policy and before the actions, describing when, where and how the policies should be used, especially in light of the various types of pricing.

For example, with Congestion Pricing Policy 1 Mobility, Describe how this implements the Oregon Highway Policy interest in setting desired outcome, and that achieving multiple outcomes is difficult. The types of actions that influence improving mobility include rate setting, investment of revenues, working together with the various impacted jurisdictions, construction/investment in various modes of travel, and non-infrastructure investments.

What are the unique items that should be thought about when organizations are pricing parking, using the cordon or pricing via VMT?

I have added some SAMPLE language under each policy (highlighted in yellow).

Consider grouping the Actions together. There isn't a need to have actions under each policy.

Policy 2: Equity

Describe how EMAC was used for ODOT pricing and POEM for input into Portland Pricing. Use the area to describe the type if input/direction the committees should provide.

Some of the Action are more applicable to roadway pricing than other types of pricing.

It is difficult to prescribe that the organizations use the Metro Equity Focus Areas as the groups to look at because they will be driven by their own organizational direction. Instead of repeating the EMAC recommendations, should it just focus on having an Equity group and their recommendations?

I have used the "Comment" function to provide comments to the changes to the other policies in the document (at the end of this document).

Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policies: the outcomes of a congestion pricing ~~project or~~ program should:

Policy 1 **Mobility**: ~~I~~Improve reliability and efficiency ~~by managing congestion~~, reduc~~e~~ing VMT, and increas~~e~~ing transportation options through investments in modal alternatives and addressing system deficiencies.~~, including transit-supportive elements and increased access to transit.~~

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

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

Policy 4 **Diversion**: Minimize diversion impacts created by ~~-~~pricing programs and projects prior to implementation and throughout the life of the pricing project. ~~before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.~~

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

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

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Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 1. **Mobility**: Improve reliability and efficiency, reduce VMT, and increase transportation options through investments in modal alternatives and addressing system deficiencies.

Congestion pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 Regional Transportation Plan, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes. However, it depends how pricing is implemented in the region. The Metro Regional Congestion Pricing Study (July 2021) outlines specific considerations for each type of congestion pricing.

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Defining clear goals and outcomes from the beginning of a pricing program is essential. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.

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Congestion pricing programs are designed to shift trips to reduce congestion at certain times on a facility. These trips could be shifted to different times of day on the same facility, onto other roadways, to other modes or potentially cause a person not to take the trip at all.

Transit and other modal options should be established and in place before a congestion pricing program is implemented. An assessment should be conducted to understand the viability of mode shift before the determination is made to implement a congestion pricing program.

In addition to demand management, congestion pricing raises revenues. Expenditure of the revenues, including maintenance and investing in system deficiencies, is central to the development and on-going implementation of the program.

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

Congestion pricing strategies have the potential to improve racial equity and benefit marginalized communities as well as all residents of the region. Congestion pricing tools have the potential to be more flexible than current funding in how funds are collected and what funds are spent on.

A significant factor of whether a congestion pricing program improves equity is how the program is designed-- how people are charged and how revenue from congestion pricing strategies is spent. A pricing program with the same charge can improve or harm equity depending on how it deals with affordability, the places it improves, and the type and locations of investments.

To ensure equitable I-205 and I-5 toll projects and processes, and to help develop a framework, ODOT convened an Equity and Mobility Advisory Committee (EMAC). This committee is a group of individuals with professional or lived experience in equity and mobility coming together to advise the Oregon Transportation Commission and ODOT on how tolls on the I-205 and I-5 freeways, in combination with other demand

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Revised Draft Congestion Pricing Policy Language Worksheet

management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects.

In providing input to the Oregon Transportation Commission, the committee considered the needs and opportunities for achieving community mobility and equity priorities as part of the National Environmental Policy Act process for toll implementation. EMAC has advised on the equity foundation of ODOT's toll projects, including guidelines, strategies and processes.

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

POEM provided input to PBOT and BPS on prices for parking, vehicle-based commercial services, highway tolling, cordons or areas pricing, and road user or per-mile charges.

Both EMAC and POEM are examples of how equity can be integrated into pricing programs from the outset. These groups are essential to the creation of pricing programs and projects and ongoing monitoring throughout implementation.

Congestion Pricing Policy 3. **Safety:** Be designed to address traffic safety and the safety of users of all modes, both on and off the priced system.

When Congestion Pricing programs are implemented there is opportunity to improve safety on the priced facility due to managing the flow of traffic through pricing. Adjacent and other roadway facilities may experience a change in usage due to congestion pricing. Investments to address safety for the traveling public should be implemented at the same time as congestion pricing is implemented.

Congestion Pricing Policy 4. **Diversion:** Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing project.

Roadway pricing has mixed results at a regional level of reducing VMT and reduced delay on the charged roadways coupled while creating increased delay to nearby non-charged roadways. Burdens and benefits were not uniformly distributed and could disproportionately impact travelers that live on the outskirts of the region, near the priced facility.

Areas further from priced roadways tend to experience worse access to jobs by auto. With fewer options of using the faster tolled roadways and competing with traffic on arterials that diverted from those tolled roadways, commuters here experienced somewhat slower travel by autos and transit. A roadway pricing program should focus on the impacts to delay on the throughways charged as well as the impacts to nearby non-charged roadways. Impacts at a localized scale would need to be examined to understand if there were investments (such as transit, bike, or pedestrian improvements) that could

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improve overall performance. In addition, the travel costs should be assessed at a granular scale to understand the impact on vulnerable groups.

Diversion from currently congested facilities occurs today, and part of the intention of congestion pricing is to address this original diversion, as well as to identify addition diversion that may be created by the priced facility.

Congestion Pricing Policy 5. Climate: Reduce greenhouse gas emissions and vehicle miles travelled (VMT) while increasing access to low-carbon travel options.

In the Regional Congestion Pricing Study, the various types of congestion pricing have a range of success at reducing greenhouse gas emissions and VMT.
The use of cordon pricing was shown to result in relatively high mode shift to transit, indicating that
The use of cordon pricing was shown to result in relatively high mode shift to transit, indicating that

Cordon design considerations could include expanding the cordon area to encompass more origins and destinations, pairing cordon pricing with roadway pricing on key facilities near the cordon, providing a time-of-day charge, or providing discounts or exemptions for groups that would be disproportionately impacted. Improvements to arterials near the cordon to speed transit (such as bus only lanes) could also be considered.

Overall, parking charging demonstrated positive results for all metrics at a regional level. The analysis shows that charging for parking could increase transit ridership – likely a direct result of charges generally being assessed in areas with good transit service and high employment. Charges were concentrated among fewer travelers compared to the VMT scenarios. While the total travel cost was low compared to other pricing scenarios, the cost to the individual drivers who parked was relatively high.

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Congestion Pricing Policy 6. User Experience: Coordinate technologies and pricing programs to create an integrated transportation experience for the users of the system.

A Vehicle Miles Traveled (VMT) program could build off of the OReGO pilot but a major implementation barrier is enforcement and mandating vehicles to participate. A pilot phase might make sense for the Portland region to trial one or more technologies before scaling up to a region-wide system. Congestion Pricing through VMT has been demonstrated to perform well on all metrics at a regional scale, largely because all driving trips would be charged. While total travel cost would be the highest among the pricing tools studied, but those costs would be the most widely distributed compared to other pricing options.

A VMT pricing program should consider whether drivers who would pay more have viable alternatives to driving, and could focus on investments (transit, pedestrian, or bicycling infrastructure) or provide discounts or caps on charges for groups that would be disproportionately impacted, either because of where they live or their ability to pay.

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Revised Draft Congestion Pricing Policy Language Worksheet

In addition to VMT programs, User experience needs to be central to all congestion pricing programs. Coordination of the tools used in programs in others states, as well as other locally implemented projects and programs is essential.

ACTIONS

- Establish equity advisory groups, including people with low-incomes, and people of color in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
  - Conduct accessible, equitable public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology.
  - Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
  - Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
    - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety) and
    - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).
- Collaborate with regional and local agencies and communities when:
  - Setting, evaluating, and adjusting mobility goals.
  - Identifying traffic safety and diversion impacts and mitigations.
  - Setting rates and determining revenue allocation
  - Long term oversight of the congestion pricing programs

- Since shifting trips to a different time of day or mode of travel is central to congestion pricing, the completion of an assessment of the project area to undertand the viability the various modes of travel should be conducted to inform the decision to implement a congestion pricing program.

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- Support the Climate Smart Strategy policies by:
  - Evaluating localized impacts including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.

- For a congestion pricing program to be successful, a plan needs to be developed for how reinvestment of a portion of net revenues and should include the following areas:
  - Modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
  - Programs and projects to address safety and diversion issues caused by pricing projects.

- Non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling.

- Identify opportunities to partner with other agencies to fund or construct modal alternatives.

- When participating in setting rates, identifying exemptions and discounts for congestion pricing programs, work to achieve:
  - Congestion management while reducing overall VMT in the project area.
  - Reduction of emissions

- Implementation, monitoring and evaluation programs should be on-going and transparent.
  - Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups who were involved in the co-creation process, community members, and local decision makers.
  - Monitor both priced and unpriced facilities, including diversion impacts, using real-time data after implementation. Adjust strategies and programs based on monitoring and evaluation findings.
  - Coordinate with other existing and proposed pricing programs and technologies for payment systems to reduce burdens on the user.
  - Varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

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

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

Commented [BK1]: I dont think this is correct. I dont think that Pricing is a tool that should be used to increase safety.

Revised Draft Congestion Pricing Policy Language Worksheet

with a focus on reducing vehicle speeds
s.

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT~~ and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies ~~adequately address arterial or throughway deficiencies and bottlenecks~~.
  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Congestion pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

Commented [BK2]: I don't agree with this language

Commented [BK3]: THese changes do not related to congestion pricing.

Commented [BK4]: I do not agree with this change. We should keep the existing language.

Metro

TPAC Feedback

Clackamas Cities

July 2022

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Name: Clackamas Team TPAC

Note: Cities of CTAC were invited to co-edit worksheet.

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

- Policies should be grounded in how they relate to the Regional Congestion Pricing Study, and how they can be applied to the build out of 2040 centers (including planned road infrastructure, e.g., urban expansion areas).
- The current policy focuses heavily on roadway pricing. Consider implications for VMT pricing, geographic-based pricing, time-of-day pricing, and other types of pricing. How do we interface with those types of programs?
- Consider the manageability of exemption programs.
- Since metro is not a decision maker on revenue investment, how is revenue investment influenced by these policies.
- Contemplate deeper coordination measures.
- Pricing certain facilities and not others is inequitable. Is there any talk about weaiving congestion pricing into a VMT program to replace the gas tax? Is there a nexus to OreGo?
- The current policy language focuses heavily on motorists, but we have a vibrant, changing transportation system. It may be groundbreaking for the RTP to briefly contemplate the applicability of pricing to future travel contexts, such as riverway travel, local airspace travel (drone deliveries) and site-specific pricing (e.g., Multnomah Falls).

What specific changes would you like to see to improve the proposed policy language?

- The proposed Metro Congestion Pricing Policy and Oregon Highway Plan Toll Amendment have conflicting diversion definitions.
- Clarify that the definition for "diversion", as used in the congestion pricing policy, only pertains to congestion pricing policy.
- Consider not only the inclusion of equity at the outset, but ensuring impacts are equitably distributed across the population.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Congestion Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
Policy 2	**Equity**: Integrate equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.
Policy 4	**Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 5	**Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 6	**Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Revised Draft Congestion Pricing Policy Language Worksheet

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

Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel

time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

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

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

Revised Draft Congestion Pricing Policy Language Worksheet

- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

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

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

with a focus on reducing vehicle speeds on local roadways and minimizing diversion from priced facilities.

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT ~~and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies ~~adequately address arterial or throughway deficiencies and bottlenecks~~.
  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Congestion pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

TPAC Feedback

Multnomah County

July 2022

TO	Alex Oreschak, Metro
CC	Jessica Berry, Transportation Planning and Development Manager Sarah Paulus, Transportation Policy Analyst Jon Henrichsen, Transportation Division Director/County Engineer
FROM	Allison Boyd, Senior Planner
DATE	August 2, 2022
RE:	Revised Draft Congestion Pricing Policy Language

Thank you for the opportunity to review and discuss the revised draft presented to TPAC on July 13th. Below are some comments and suggestions to your two questions as you further refine.

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Coordinated approach and vision

A gap that we would like to see more discussion on is how the congestion pricing policy can set the stage for more system planning of what a regionally coordinated priced transportation system might look like. Currently the policies are focused on a project by project application of pricing. We think a next phase to the Regional Congestion Pricing Study that should be described in this RTP update is to develop criteria for what would make a good candidate for a priced facility, identify potential corridors and conduct analysis to better understand system-wide impacts and benefits as more pricing comes on line and what the cumulative impacts will be to users of the system and economic centers. This would help, for example, to determine how much a priced system could assist in meeting our climate goals, where there are alternative transportation improvements needed for mode shift that may not be easily funded through pricing revenues on a project by project basis, and how coordination can occur for equitable implementation.

Revenue Generation

Another gap in the policy is acknowledging that a driving factor of some, or even most pricing projects, is likely to be to raise revenue. The advice of the expert panel to make the primary purpose of pricing projects to reduce congestion is ideal, but the reality is that ODOT has determined that they need

tolling revenue to implement their major projects and local agencies in the region also have significant revenue needs that pricing could potentially help them meet. For instance, we're currently discussing in this RTP update that we do not have enough funding to address all of the critical safety needs on arterials in the region. In addition, local agencies such as Multnomah County, have identified funding shortfalls for capital projects and effective asset management. New sources of revenue are needed in the region and tolling, road user charges, and parking pricing are some of the tools that can help mitigate these funding needs. It will be important that the policies guide how agencies can meet their revenue objectives while also setting rates and reinvesting to meet the mobility, climate, safety, and equity goals of the RTP policies. Currently the policies seem to be almost working in isolation and may make balancing the many desires for pricing difficult in implementation.

Pricing unrelated to congestion

The policies, as written without additional context from the narrative, aren't clear if they only apply to pricing projects that are focused on managing an identified congestion problem or also apply to more traditional pricing that is not in response to congestion but to raise revenue for necessary capital improvements, maintenance, and operations, e.g. a bridge toll or the road user charge proposed to replace gas tax revenue. We recommend being more explicit about the types of pricing projects the policies apply to and tying this to the definitions.

Local pricing projects vs. projects of regional significance

We also would like to see more clarity on when a pricing project would need to be included in the RTP project list and what might be done at a local level. Some of the draft policies that focus on process seem to assume projects with a large budget such as the ODOT projects that include NEPA phases and have equity committees, however, not all projects may be of this scale.

What specific changes would you like to see to improve the proposed policy language?

Revenue reinvestment

Language should reflect that there may not be authority to reinvest net revenues in some of the identified areas for every pricing project, e.g. "off the facility", on transit improvements, or in equity focus areas if not adjacent to the facility.

The actions to reinvest "a portion of net revenues" do not set specific expectations or criteria for projects. There are several different areas to reinvest in as well as considerations for rate setting which may split net revenues into very small slices. Who would decide if the allocated revenue portion is

adequate? What if there isn't enough net revenues to apply to each policy area? To be effective, there could be targets or a process for coordination in determining reinvestment allocations.

Some of the actions refer to reinvesting net revenues for purposes of managing safety issues or diversion; however, there is also direction to mitigate these impacts. Clearly separating mitigation actions, which would be an expense of the program, from net revenue reinvestment would provide more certainty that some of these issues are addressed.

Mobility

Coordinating transit needs around pricing projects could have the unintended consequences of redirecting transit investments from areas of the region that are not adjacent to a pricing project, e.g. HCT corridors mentioned in Action 4. With constitutional restrictions and potential for narrowly defined corridors, this could mean that the pricing revenue is not paying for transit improvements that are necessary to mitigate the impact of the pricing projects but that instead is coming out of funding that is also needed in, and could be be spent in, multiple locations that have identified gaps in transit access or efficiency and reliability that are not related to a pricing project.

Equity

The equity process actions could require a large budget to implement fully and effectively. Not all pricing planning will be as well funded as the ODOT tolling projects. How can these process actions be met while scaling for different project capabilities? Equity outcomes should be clearly identified in addition to processes for achieving consistency among different projects, and who may be participating in them.

Equity Action 3 calls for using a consistent definition and methodology. Will the RTP update include a future project to develop this?

Equity Action 5 calls for basing eligibility for a progressive fee structure on population categories such as identifying as a person of color. We don't believe eligibility would be able to be set based on race and recommend that you reword this policy so that eligibility is based on low-income users and encourages/identifies methods to increase enrollment in communities of color.

Safety and Diversion

As mentioned above Action 5 under Safety and Action 6 under Diversion, we believe you should consider the difference between mitigation and long-term reinvestment. Addressing issues caused by

the pricing projects as currently drafted in these actions should be required mitigation. Reinvestment goals, for safety in particular, could include safety improvements in the community that are not directly caused by the project.

Climate

How will Climate Action 1 be balanced with other rate setting goals such as revenue and affordability while still ensuring the emissions reductions that will help us meet our regional goals?

Climate Action 2 says to consider local emissions impacts. We are assuming this is referring to air quality and health impacts that could result from diversion. This should not be a consideration but a requirement for evaluation and mitigation.

Emerging Technologies

Coordination among pricing projects related to emerging technology and reducing burdens on the user is a good action. A similar action to coordinate cumulative impacts and mitigation between projects would be a good addition to the equity actions as well since it may extend beyond technology considerations.

Metro

TPAC Feedback

ODOT

July 2022

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Agency name: ODOT

General comments:

- The Oregon Transportation Plan and Oregon Highway Plan (OTP and OHP) document the statewide policies for regional, county, and city transportation policies and plans. RTP policies and actions should be updated to be consistent with the OTP and OHP.
- The legislature designated the OTC as the toll authority to set toll rates and policies for state highways and bridges in Oregon. There will be a process to determine toll rates and investments from revenue generated from tolls. It's premature to indicate how much and where the revenue will be spent. This applies to all the policies.
- Keep RTP policies as high level guidance to facility owners so they can tailor operations to best address potentially competing needs.
- The policy outcomes should result in choosing the transportation facility, mode, and time that is most appropriate for the trip.
- Consider changing "diversion" to "rerouting" in instances that refer to "diversion" as inflicting negative impacts, since some types of diversion are good.
- The RTP must make room for a large range of possible congestion pricing tools and goals and not proscribe. Future RTPs can refine them.
- Many goals naturally compete, such as mobility targets vs. diversion. In that light, the and/or approach is more appropriate than a demand list.
- Congestion pricing policies need to focus on demand and congestion management. A preference for POEM, RMPP, etc. to encourage transit is appropriate, but a hard policy that requires financial support of transit is not.
- Refine definitions to be consistent with national practice and update definitions to clarify that Road Usage Charge/VMT Fee/Mileage Based User Fee are not congestion pricing innately but can be varied by time of day/location to be considered congestion pricing.

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Policy 4 can more directly and clearly address concern related to traffic volume increases on non-tolled routes (i.e., diversion resulting in vehicle trip rerouting).

Policy 6 can be retitled to focus on desired outcome (Integrated User Experience) rather than reference to tools to achieve it (Emerging Technologies).

See revisions in track changes and comments below for additional items to address.

Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

Policy 1:

- Eliminate the requirement that pricing leads to VMT reduction on the priced facility. Congestion pricing is to reach a congestion performance and overall emissions, not necessarily VMT.

Policy 2:

- Equity Focus Areas is not an industry standard used in the region.
- The policy should encourage evaluation of opportunities but not guarantee that there will be exemptions/discounts in every application.

Policy 3:

- Reduction of vehicle trips does not equate to safety. This seems to better fit with the Mobility Policy.
- The amount of monitoring is significant. While monitoring is important, who is responsible for the action – doing the monitoring, and cost to address a future safety issue?

Policy 4:

- Limit potential for negative impacts due to motor vehicle traffic volume increases caused by rerouting of trips away from priced roadways to unpriced roadways before, during, and after pricing programs and projects are implemented, especially on the regional high injury corridors.
- The policy should address diversion impacts and effects resulting from implementation but not before implementation.
- It's unclear who is responsible for monitoring and addressing diversion issues. Indicate the level of diversion to be evaluated.

Policy 5:

- This is inconsistent with the OHP in that the OTC sets toll rates and policies for state highways and bridges. There will be a process to determine toll rates and investments from revenue generated from tolls. It's premature to indicate how much and where revenue will be spent.
- Rate setting to reduce VMT is different than pricing for congestion management and it's inconsistent with the OHP. Congestion pricing is to reach a congestion performance and overall emissions.

Policy 12:

- The RTP needs to be consistent with the OTP and OHP. Those plans are currently undergoing an update. We recommend discussion on RTP Policy 12 wait for draft OHP policies.
- Past RTPs have focused on completing the system. Draft Policy 12 walks back commitments ODOT has made.
- The proposed Policy 12 could prevent transportation projects that were a factor in approving zoning (TPR).
- It is not appropriate to strike "beyond the planned system of motor vehicle through lanes" to draft Policy 12 as that potentially invalidates all TSPs in the region.

See revisions in track changes and comments below for additional items to address.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Congestion Pricing Policies

Policy 1	**Mobility:** Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
Policy 2	**Equity:** Integrate equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety:** Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.
Policy 4	**Diversion:** Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 5	**Climate:** Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 6	**Emerging Technologies:** Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Commented [BRT1]: On diversion: We've tried to be specific about referencing rerouting instead of diversion, because not all diversion is "bad." In the context of the language in the policy, it seems like rerouting is what they are really trying to mitigate.

Commented [WZN2]: The climate policy appears to be an implicit endorsement of discounts or exemptions for Low Emission Vehicles (LEV). Is that the intention? Worth noting that providing LEV discounts or exemptions may have equity concerns related to income.

Commented [SCR3]: Policy 1: Reducing VMT does not improve mobility in and of itself. Either increased or decreased VMT must be further examined to determine what the overall effect is on mobility.

Revised Draft Congestion Pricing Policy Language Worksheet

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

Action Items:

- Set rates for congestion pricing at a level that will manage congestion on the priced facility while limiting rerouting to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.

Commented [BRT4]: Consider including Transportation Demand Management (TDM) programs.

Commented [SCR5]: Reducing VMT on a regional level can be good, however, reducing VMT on the freeway facility can have unintended consequences. Rerouting versus diversion has been emphasized due to this. With reduced congestion, some drivers will leave the freeway, but others may go back to the freeway due to the reduced congestion. Freeway driving tends to emit less CO2 than arterial driving and is considered safer, particularly from a pedestrian/bicycle standpoint. For this reason, VMT reduction on the freeway may not be desirable if congestion can be managed.

Commented [SCR6]: VMT reduction due to mode shift is a definite positive.

Revised Draft Congestion Pricing Policy Language Worksheet

- Provide a progressive fee structure which includes exemptions, credits, or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

Commented [BRT7]: This wording doesn't seem quite right, unless we are missing something. The phrase "in one or more" categories may imply "identifying as a person of color" alone is enough to qualify which makes it race-based and that might not go over well.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying impacts and mitigations for identified traffic volume increases resulting from pricing projects.
- Use a data-driven approach to identify potential impacts due to traffic volume increases on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.

Revised Draft Congestion Pricing Policy Language Worksheet

- Evaluate localized impacts of traffic volume increases including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and traffic volume increase mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage traffic volume increases caused by pricing projects.

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

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from rerouting or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.

Commented [SCR8]: Concerns with this were discussed in a previous comment on page 3.

Revised Draft Congestion Pricing Policy Language Worksheet

- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

Congestion pricing almost never would be a flat rate – as the whole ideas is to manage congestion throughout the day and every facility has a demand curve that is not consistent 24/7.

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

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

Cordon pricing does not need to be and often is not determined by where congestion exists, rather it is just a boundary of where it would apply.

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

Parking pricing is not a sub-set of Congestion Pricing – it needs to be separated into a different category of pricing.

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

Commented [UD9]: Changes below were previously communicated to Metro). Repeating these edits, with hope that they are considered, because the terminology use is not consistent with national practice.

OReGO now uses "Usage" instead of "User" for RUC.

Commented [SCR10]: In and of itself, Road User Charge / VMT Fee / Mileage Based User Fee are not congestion pricing. As discussed in the definition, they are an alternative to fuel taxes. These types of fees can be varied by time of day and/or facility so that they become congestion pricing.

Revised Draft Congestion Pricing Policy Language Worksheet

Flat Rate Fee (Toll): A flat rate fee, also known as a toll, charged by a toll facility operator in an amount set by the operator for the privilege of traveling on said toll facility. Tolling is a user fee system for specific infrastructure such a bridges and tunnels. Toll revenues are used for costs associated with the tolled infrastructures. This tool is used to raise funds for construction, operations, maintenance, and administration of specific infrastructure. Flat Rate Tolling can also serve as a method for congestion management, though it is not responsive to changing conditions or time of day. Additionally, flat rate tolling cannot be used for congestion pricing projects authorized by the Value Pricing Pilot Program or Section 166 on interstate highways under Federal law.

Flat Rate is a type of tolling application where you are paying for infrastructure but you don't have any need to manage congestion. Tolling can include variable rate for congestion pricing to help pay for the project and it is not limited to Flat Rate only.

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

Dynamic Rate Fee: Fee rates are continually adjusted according to traffic conditions to better achieve a free-flowing level of traffic. Under this system, fee rates increase when the priced facilities get relatively full and decrease when the priced facilities get less full. This system is more complex and less predictable than using a flat or variable rate fee structure, but its flexibility helps to better achieve the optimal traffic flow by reflecting changes in travel demand. The current price is often displayed on electronic signs prior to the beginning of the priced facility.

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

Indicate the level of diversion that warrants evaluation.

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

with a focus on reducing vehicle speeds on local roadways and minimizing diversion from priced facilities.

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, , and increasing transportation options through investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion ~~and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies ~~adequately address arterial or throughway deficiencies and bottlenecks~~.

  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Road pricing strategies***
      - *Congestion Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road Usage Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

Metro

TPAC Feedback

PBOT

July 2022

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Agency name: _____Portland Bureau of Transportation_____

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

We appreciate the incorporation of many of our suggested edits and additions/ reformatting from our previous round of comments. And while we see some more explicit connection between the Climate Smart Strategy and pricing (especially in the last Action bullet under Congestion Pricing Policy 5), we would continue to emphasize our comments that the clearer we can be about how pricing will be a key move in Climate Smart Strategy that can meet the updated CFEC target for VMT reduction, the more likely we are to achieve a meaningfully actionable vision for the role of pricing in our region, with appropriate next steps documented in Chapter 8 and reflected in the funding strategy and projects, programs and policies included in this update. We have also recommended adding language in the equity Policy that acknowledges current inequities and says that pricing policy benefits and burdens need to be compared with the benefits and burdens of not implementing pricing, which is a key thing we heard from our POEM Task Force.

This raises a broader point about how to understand the Actions relative to the Policies, since this hasn't been a consistent approach across all of the Chapter 3 policy sections. Do they have the same force as the policy? If not, then we may need to rethink what counts as policy vs "nice to do" since there are some critical concepts, actions and policy operationalization steps included in those Actions that will be crucial to the success of pricing meeting supporting achievement of our regional goals and aligning with our regional values.

Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

See the line item comments and suggested edits (highlighted since it was using the same color as your tracked changes) in the document below.

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
Policy 2	**Equity**: Integrate equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.
Policy 4	**Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 5	**Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 6	**Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Revised Draft Congestion Pricing Policy Language Worksheet

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

Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with impacted state, regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other jursidictional partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The

methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.
- When considering implementing pricng and evaluating the distribution of benefits and burdens, compare pricing scenarios or options against the existing distributin of benefits and burdens of a scenario where pricing is not beng used as other investments are proposed for the same facility or area.

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

Action Items:

- Collaborate with impacted state, regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

Revised Draft Congestion Pricing Policy Language Worksheet

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

Action Items:

- Collaborate with impacted state, regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

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

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies, including through the Congestion Management Process.

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

Revised Draft Congestion Pricing Policy Language Worksheet

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

Revised Draft Congestion Pricing Policy Language Worksheet

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Key terms will be included in the RTP glossary.

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

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Revised Draft Congestion Pricing Policy Language Worksheet

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

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- **Safety and Security Policies (3.2.1.4)**
  - **Policy 4**. Increase safety for all modes of travel for all people through the planning, design, construction, operation, pricing and maintenance of the transportation system,

with a focus on reducing vehicle speeds on local roadways and minimizing diversion from priced facilities.

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
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  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT ~~and raise revenue when one or more lanes are being added to throughways~~.
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  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Congestion pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

Metro

TPAC Feedback

TriMet

July 2022

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Agency name: TriMet

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

Address role of pricing as revenue generation tool. Suggest some potential language edits under the progressive fee structure. Made notes in text below.

We made some suggested edits to language in action items under Policies 1 and 2 to reference mobility options and technology.

What specific changes would you like to see to improve the proposed policy language?

If this language would also apply to other forms of pricing, such as RUC at a regional level or potential parking fees we may want to levy in the future, it should call that out. We would not want this language to inadvertently apply to TriMet fares or other fees we might levy.

Policy 4: possible inconsistencies in definition of diversion. By referencing local streets does not reflect arterials, connectors as above.

There are some overlaps between the policies and public engagement, revenue investment, ongoing monitoring seem to be included throughout since there are similar actions under each policy topic. I wonder if organizing them differently would reduce overlap.

Recommend numbering or lettering action items to make it easier to follow instead of bullets. Policy 1, Action A etc.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Congestion Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
Policy 2	**Equity**: Integrate equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.
Policy 4	**Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 5	**Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 6	**Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

Revised Draft Congestion Pricing Policy Language Worksheet

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

Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT, and, when mutually agreed upon by regional partners, generate additional revenue, on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements, mobility infrastructure that supports transit- and walk-oriented development, and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities, all levels of access to technology, and languages other than English. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with

low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.
- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

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

Revised Draft Congestion Pricing Policy Language Worksheet

Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

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

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.

Revised Draft Congestion Pricing Policy Language Worksheet

- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

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

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

with a focus on reducing vehicle speeds on local roadways and minimizing diversion from priced facilities.

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT ~~and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot meet regional mobility, safety, climate, and equity policies ~~adequately address arterial or throughway deficiencies and bottlenecks~~.
  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Congestion pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

Metro

TPAC Feedback

Washington County

July 2022

Revised Draft Congestion Pricing Policy Language Worksheet

This worksheet provides space for TPAC members to provide feedback on the proposed revised congestion pricing policy language that was shared at the July 13, 2022 TPAC workshop. The proposed revised policy language is included beginning on page 2 of this worksheet.

Feedback is requested by end of day on Friday, July 29, 2022. Please return this worksheet to alex.oreschak@oregonmetro.gov and copy marie.miller@oregonmetro.gov.

Agency name: _Washington County_____

Are there still gaps in the proposed congestion pricing policy that you would like to see addressed?

- Clarify that pricing is used to raise revenue and manage demand. The proposed policies focus on demand management only.
- Add context – this guides when, who and how would these policies apply to (eg priviate parking pricing?) – what is Metro's role is setting these policies
- Propose that they be presented as guidelines for establishing pricing programs by local or state entitities, not directives.
- The policies need to be kept at a high level because there will be other processes to decide the purpose of the RUC, parking, cordon and roadway pricing programs. For example, road user charge can be an important source of revenue to supplement road fund and support operations and maintenance and not strictly a demand management tool.
- The term pricing programs **and projects** is not defined. Explain the difference; don't see the need to refer to projects – the rest of the RTP policies guides projects. Focus on programs here.
- Simplify the policy statements – some include both the what of the policy and how it is achieved. Save the 'how' for the action statements.
- Add guidelines for local and regional engagement in setting up pricing programs and monitoring/evaluating over time

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See the edits on the attached document.

General comments on pricing policies include:

- Consolidate actions – too much redundancy
- Have a separate section on net revenue and don't dictate priorities (eg HIC)
- Change emerging technology to user experience and administration
- Add policy on pubilc engagement

Increasing 'access to' transit isn't good enough – need to be stronger on having transit options seen as part of pricing program – whether funded directly or from other source

Other Chapter 3 edits:

- Refer to VMT/capita; not VMT. With our growing region, VMT alone is not a good measure of progress
- Delete changes in Regional Motor Vehicle Network policies 3.5, policy 6 and 12.

July 15, 2022

Revised Draft Congestion Pricing Policy Language Worksheet

What specific changes would you like to see to improve the proposed policy language?

3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Commented [CD1]: Clarify these are intended to guide development of pricing programs – and for whom. RTP focus is on coordinating local TSPs – some of this seems like telling ODOT what to do. Add context for who/where/when these apply.

Congestion Pricing Policies

Policy 1 **Mobility:** Reduce congestion, promote multimodal travel options and improve reliability and efficiency of the transportation system.

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

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

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

Policy 4 **Diversion**: Minimize diversion impacts ~~to~~ to nearby unpriced facilities including throughway, arterial, collector and local streets in the project area.~~before, during, and after pricing programs and projects are implemented~~, ~~especially when diversion is expected on the regional high injury corridors.~~

Policy 5 **Climate**: Reduce greenhouse gas emissions by improving highway system performance and increasing use of transit and other modes.~~and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.~~

July 15, 2022

Revised Draft Congestion Pricing Policy Language Worksheet

July 15, 2022

Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 1. Mobility: Mobility: Reduce congestion, promote multimodal travel options and improve reliability and efficiency of the transportation system.

Action Items:

- Set rates for congestion pricing at a level that will reduce congestion and improve reliability on the transportation system while minimizing diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting toll or pricing rates.

Congestion Pricing Policy 2. Equity: Integrate equity and affordability into pricing programs from the outset.

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined at local, regional or state levels associated with pricing program type) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and options for reinvestment of revenues.
- Develop a methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, The methodology should consider a variety of factors such as residential locations and destinations.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a fee structure which includes exemptions or discounts for qualified users. Base eligibility on low-income and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.

July 15, 2022

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Commented [CD3]: If this means goals for the pricing program, it should go into a section about how to set up a pricing program

Commented [CD4]: This belongs in the community outreach section – if the purpose is to identify the pricing goals.

Commented [CD5]: Have a separate section on net revenue, too redundant to describe separately

Commented [CD6]: These policies are about pricing programs, not projects. Other RTP policies guide projects.

Commented [CD7]: Recommend folding in general public engagement in this section or having a separate section if this focuses on equity only.

Commented [CD8]: Should be one but not only input in reinvestment

Commented [CD9]: This isn't possible. We have multiple approaches for defining equity areas today.

Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 3. Safety: Improve traffic safety and the safety of users of all modes, both on and off the priced system.

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Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations associated with pricing
- Identify potential traffic safety impacts both during and after implementation of pricing projects and monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Evaluate and mitigate for impacts from pricing including changes in traffic from diversion and
  Evaluate and mitigate for impacts from pricing including changes in traffic from diversion and

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.
- Use a data-driven approach to define and identify diversion impacts both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate impacts of diversion including factors such as increased congestion, , travel time and reliability., noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Distinguish between short and long trips and align mitigation with pricing program goals (eg parking, cordon, road user charge, roadway)
-

Commented [CD10]: Is data-driven approach the same as real time data….

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

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Commented [CD12]: We need to say how much is significant for diversion – but should be determined based on pricing program

Commented [CD13]: Why focus on local streets – should be all roads/throughways experiencing diversion

Commented [CD14]: Consolidate into a net revenue section

Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 5. Climate and air quality: Reduce greenhouse gas emissions and vehicle miles travelled/capita while increasing use of low-carbon travel options

Action Items:

- Set rates for congestion pricing at a level that will support reliable and efficient travel times on the transportation system and reduce VMT/capita
- Identify localized greenhouse gas emissions impacts due to pricing and identify strategies for mitigation.
- Identify how congestion pricing can address and support the climate goals and objectives and
  Identify how congestion pricing can address and support the climate goals and objectives and
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  Identify how congestion pricing can address and support the climate goals and objectives and

Congestion Pricing Policy 6. User experience and administration make pricing a seamless experience and reduce administrative burdens

Action Items:

- Coordinate technologies across pricing programs to create an integrated transportation experience for the users of the system and reduce administrative redundancy through payment systems rate settings, discounts and exemptions.
  payment systems
  rate settings,
  discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.
- **Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after**
  Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after
  Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after
  Congestion Pricing Policy 7 – net revenue: Define goals and objectives for net revenues after

Actions:

- Allocate net revenue to support meeting the equity, climate and safety goals, mitigate diversion and improve the travel time and reliability performance of the transportation system.
- *(move other net revenue actions here)*

July 15, 2022

Commented [CD15]: Not needed words, since all policies apply to designing and implementing pricing program (create new section in background to say this)

Commented [CD16]: This is already covered in the diversion section

Commented [CD17]: This is already covered in the diversion section

Commented [CD18]: Move to net revenue section

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Commented [CD20]: Covered above

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Revised Draft Congestion Pricing Policy Language Worksheet

Congestion Pricing Policy 8- Coordination and engagement: Establish public engagement process before, after and during the development and implementation of the pricing program to guide pricing program goals and objectives.

Actions:

- Establish public input process tailored to the scale of the pricing program and its benefits and impacs.
- Solicit public input in measures needed to improve the transportation sytem and mitigate from diversion and safety impacts
- Commit to ongoing public input in evaluation and monitoring
- *(more other coordination/engagement actions here)*

July 15, 2022

Revised Draft Congestion Pricing Policy Language Worksheet

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

Revised Draft Congestion Pricing Policy Language Worksheet

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

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

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

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

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

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

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

Commented [CD22]: How is pricing a tool to support safety?

Revised Draft Congestion Pricing Policy Language Worksheet

with a focus on reducing vehicle speeds

- **Transportation Demand Management Policies (3.11)**
  - **Policy 1** – Expand use of pricing strategies to improve reliability and efficiency by managing congestion, reducing VMT/capita, and increasing transportation options through investments in transit services, transit-supportive elements and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~
  - Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.
- **Regional Motor Vehicle Network Policies (3.5)**
  - **Policy 6** – ~~In combination with increased transit service, consider~~ If new capacity is being added after completing analysis under Policy 12, evaluate use of ~~value~~ pricing and increased transit service in conjunction with the new capacity to manage traffic congestion and reduce VMT/capita ~~and raise revenue when one or more lanes are being added to throughways~~.
  - **Policy 12** – Prior to adding new motor vehicle capacity ~~beyond the planned system of motor vehicle through lanes~~, demonstrate that system and demand management strategies, including access management, transit and freight priority, ~~and value~~ congestion pricing, and transit service and multimodal connectivity improvements cannot ~~adequately address arterial or throughway deficiencies and bottlenecks~~.
  - **Table 3.7 Toolbox of strategies to address congestion in the region**
    - ***Congestion pricing strategies***
      - *Roadway Pricing, including:*
        - ~~*Peak period*~~ *Variable rate or time of day pricing*
        - *Managed lanes*
        - *High occupancy toll (HOT) lanes*
      - *Road User Charge (or Vehicle Miles Traveled Fee or Mileage Based User Fee)*
      - *Parking Pricing and Management*
      - *Cordon Pricing*

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

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

Commented [CD25]: Drop the changes here. Local's won't have ability to add new transit capacity or consider pricing in every new road improvenet.

Commented [CD26]: Leave this in. We have to have a planned system – takes years for investment. Need an RTP with ongoing commitments.

Commented [CD27]: Regional policies don't reflect local needs for all roads. Eg – need for new road to support economic development or new UGB area or to add capacity on old rural road now serving urban needs

Commented [CD28]: Keep this in too

Commented [CD29]: Need to point out pricing as a strategy to raise revenue; not just manage congestion

Commented [CD30]: What about a bridge toll – pricing to raise revenue.

Attachment 3

JPACT & Council Workshop #2 (July 28, 2022) Summary

August 2022

Metro

2023 Regional Transportation Plan update

JPACT and Metro Council RTP Workshop 2

Developing Regional Congestion Pricing Policy

A summary of the July 28, 2022 workshop about developing regional congestion pricing policy for the 2023 Regional Transportation Plan update.

July 2022

Meeting minutes

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

Meeting:	JPACT & Metro Council RTP Workshop 2
Date:	Thursday, July 28, 2022
Time:	7:30 a.m. to 9:30 a.m.
Place:	Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221
Livestream:	https://youtu.be/-mF1lCXAWP8; Telephone 877-853-5257 (Webinar ID: 831 1110 7022
Purpose:	Discuss Congestion Pricing Policy being developed for 2023 Regional Transportation Plan.
Outcome(s):	Feedback on draft congestion pricing policies for 2023 RTP.

Attendance

Members present	Affiliation
Councilor Shirley Craddick (JPACT Chair)	Metro Council
Councilor Christine Lewis (Deputy President)	Metro Council
Council President Lynn Peterson	Metro Council
Councilor Mary Nolan	Metro Council
Councilor Gerritt Rosenthal	Metro Council
Commissioner Nafisa Fai	Washington County
Commissioner Paul Savas	Clackamas County
Commissioner Jo Ann Hardesty	City of Portland
Mayor Travis Stovall	Cities of Multnomah County
Kathy Hyzy (Milwaukie City Council President)	Cities of Clackamas County
Rian Windsheimer	Oregon Department of Transportation
Sam Desue	TriMet
Mayor Anne McEnerny-Ogle	City of Vancouver
Carley Francis	Washington Department of Transportation
Emerald Bogue	Port of Portland

Alternates present	Affiliation
Michael Orman	Department of Environmental Quality (DEQ)

Members excused	Affiliation
Councilor Duncan Hwang	Metro Council
Commissioner Jessica Vega Pederson	Multnomah County
Curtis Robinhold	Port of Portland
Councilor Juan Carlos Gonzalez	Metro Council
Commissioner Temple Lentz	Clark County
Mayor Steve Callaway	Cities of Washington County

Guest Speakers present	Affiliation
Esme Miller	City of Portland's Pricing Options for Equitable Mobility Member
Phillip Wu	ODOT's Equity and Mobility Advisory Committee

Staff present	Affiliation
Margi Bradway	Metro
Kim Ellis	Metro
Jaye Cromwell	Metro
Amanda Pietz	Oregon Department of Transportation
Garet Prior	Oregon Department of Transportation
Alex Oreschak	Metro
Brandy Steffen	JLA Public Involvement
Camille Pearce	JLA Public Involvement

Observers present	Affiliation
Chris Ford	ODOT
Brendan Finn	ODOT
Glen Bolen	ODOT
Mayor Julie Fitzgerald	City of Wilsonville
Councilor Baumgardener	City of West Linn
Tom Markgraf	TriMet
JC Vannatta	TriMet

Takeaways

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

- The policies and strategies developed around congestion pricing should focus on equity and climate resiliency as primary objectives
- The committee should acknowledge the history of marginalizing communities and craft policies that benefit these communities
- A low-income tolling program is necessary for building an equitable, sustainable system
- Several members requested opportunities for more in-depth conversations

Welcome and Introductions

JPACT Chair, Councilor Shirley Craddick began the workshop with attendance and emphasized that these discussions will set the policies and funding decisions for the next 20 years.

Council President Lynn Peterson (Metro) provided opening remarks. She thanked everyone for their hard work on developing regional congestion pricing that will help manage demand; provide access to everyone in the region; and meet greenhouse gas (GHG) emission reduction and racial equity goals. She reiterated that the draft congestion pricing policies developed for the 2023 RTP are important for the group to think about for the region's transportation needs and future growth. The RTP is an opportunity to take control of that growth

and identify achievable actions to improve the system. Councilor Peterson asked the group to consider if the regional congestion pricing policies reflect the values and previous work of the legislature (HB3355), ODOT, and JPACT.

Brandy Steffen (Facilitator with JLA) then gave an overview of meeting protocols and agenda. The focus of the workshop is to start discussing the draft policies, building on the previous workshop's recommendations.

Presentations

Equity and Mobility Committees

The first presentation was a video recording by Esme Miller, Assistant Director of Research and Assessment at Lewis and Clark College and member of the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force. The Task Force began with the urgency to address climate challenges and evaluated policies from that perspective.

> "… this region has managed its growth by not just figuratively but literally marginalizing – pushing to the margins – anyone not protected by whiteness, money, or property ownership. The housing, land use, and transportation systems that we have, reliably produce two things: social exclusion and carbon emissions. This is why it is urgent to begin with equity and climate."
>
> *- Esme Miller*
> *POEM Task Force member*

Pricing can provide leverage to develop a more just system, and clearly defined goals will help with implementing the policies. She asked the group to remember that Transportation Demand Management (TDM) is about the whole system, not just motor vehicles. The first action we can take is reduce vehicle miles traveled (VMT) and increase mobility through alternate travel modes. There are also opportunities to find complementary strategies that support equity and climate goals such as affordable housing and workplace incentives and rebates.

She noted the Task Force was excited about variable pricing because it promotes behavior change. She also urged the group to consider equity goals over revenue when considering a pricing structure. It was also important to the Task Force to suggest providing income-based exemptions and use existing means testing systems for a more streamlined approach. They are also enthusiastic about road usage charges if it's administered for equity and climate goals, rather than simply to expand the highway system. She encouraged the group to think broadly about complementary strategies and how important it is to support reliable transport service.

> "We get better results when we use a process that is truly built for everyone – not just inclusive. It is built for everyone."
>
> *- Kathy Hyzy*
> *Council President, City of*

As a representative for ODOT's Equity and Mobility Advisory Committee (EMAC) member, Dr. Phillip Wu, gave a presentation on EMAC's recommendations on congestion pricing. The goal of EMAC was to center equity on the regional tolling projects and advise the Oregon Transportation Commission (OTC) on how toll programs can benefit communities that have been underserved and underrepresented. They looked at three things: neighborhood health and safety, low income and affordability impacts, and transit and multimodal transportation options.

In order to center equity, Dr. Wu said that we have to acknowledge history. We know previous policy decisions have harmed marginalized communities, and we've seen symptoms of community harm and trauma. EMAC recommends a trauma-informed perspective that results in community empowerment, shared trust, community healing, and growth.

EMAC's July 2022 Recommended Actions include:

- **Congestion management**
  - Balancing improving mobility, advancing climate goals, and avoiding disproportional burdens to marginalized communities
- **Revenue generation strategies**
  - Prioritizing a substantial contribution to low-income programs to provide credits and exemptions to increase affordability
- **Business Investment**
  - Increasing the amount of funds that are spent on businesses owned by disadvantaged, minorities, and women by awarding tolling contracts to these businesses.
- **Accountability**
  - Institutionalizing and normalizing transparency as well as building trust

Finally, EMAC recommends including voices that represent diversity in these conversations in order to achieve these goals.

Oregon Highway Plan Tolling Policy Amendment

Amanda Pietz (ODOT) gave a presentation on the proposed amendment to Oregon Highway Plan (OHP) tolling policy as required by the Legislature to address current climate, equity, and administrative goals. The drafted policies were released on June 1, 2022 for public review and will close on September 15. The policy will then be revised and considered for adoption by the Oregon Transportation Commission (OTC) in Fall 2022.

The OHP amendment addresses the policy framework on toll pricing and how it will be used as a tool, sets objectives and standards for identifying tolling projects, identifies how to set rates with an equity lens, and recommends how toll revenues should be used.

ODOT has heard three major themes through public feedback:

- Create more flexibility in the definition of corridors in the policy
- Develop a better understanding of how policies on diversion relate to short trips and local transportation systems
- Reconsider how funding from revenue will be spent

> "When we looked at how tolling programs are doing this throughout the nation, it was extremely underwhelming. If you're hitting enrollment of maybe 10-15%, you're a national leader. […] We want 100%. We want everybody who needs to get this to get that benefit."
>
> *- Garet Prior*
> *Oregon Department of Transportation (ODOT)*

Next, Garet Prior (ODOT) gave a presentation on the low-income tolling program being considered. He agreed with Council President Peterson, who said the biggest gap is overcoming the trust barrier that the public has with ODOT. Additionally, people want to know how tolling is going to affect their daily budget. ODOT acknowledges that to do tolling equitably, Oregon needs a low-income tolling program.

ODOT is currently considering a few options:

- Provide a significant discount for households equal to or below 200% Federal Poverty level
- Provide a smaller, more focused discount for households above 201-400% of the Federal Poverty level
- Use a certification process that leverages existing programs for verification and further explore self-certification

Congestion Pricing

Margi Bradway (Metro) provided an overview of the draft policies that the group would discuss during the workshop, noting that there will be more opportunities for the members to refine the policies in future meetings. She added that Metro is committed to collaborating with ODOT and bringing updates to the committees early and often as part of the 2023 Regional Transportation Plan (RTP) update.

Alex Oreschak (Metro) presented an overview of Metro's Regional Congestion Pricing Study, recommended by JPACT and the Metro Council in 2018 and completed in 2019. He noted the draft policies for the 2023 RTP were shaped by engaged the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC) in preparation for today's workshop discussion. The study found all four pricing types have the potential to address climate and congestion priorities, and all eight scenarios reduce drive alone rate, VMT, and GHG emissions while increasing daily transit trips. However, there were some tradeoffs for each scenario.

The feedback themes include:

- A desire to lead with equity and climate
- Concerns about diversion and its impacts
- Desire for revenue to be used for multimodal investments

Small group discussion: Congestion Pricing Policies

Brandy then led the group in a small group exercise to offer thoughts on the six draft policy areas identified in the first session. Before the breakout, the following clarifying questions were raised:

- Clarification on the term "equity" and confirmation if we are discussing racial and income equity.
    - Margi noted Metro has a racial-focused equity plan. In the 2018 RTP, JPACT helped define equity focus areas based on race, low-income, and English-as-a-second-language.
- Is there congestion pricing anywhere else in state of Oregon? They also asked Amanda to briefly discuss how congestion pricing would be used for mass transit and multimodal investments?
    - Amanda said no, congestion pricing is not used in Oregon.

    - Amanda noted they currently have a hierarchy of spending depending on primary objectives. They are still considering how to portion out funds when congestion pricing is the driving factor. She acknowledged that tolling is subject to Oregon constitutional restrictions, which limits operational funding.
- There are major issues to address and it is frustrating to be limited by the meeting length.
    - Margi noted that Metro adjusted the agenda to make time for more discussion as well as added an additional work session in September. The OHP amendment will also be discussed at the JPACT meeting in August.

The following is a summary of their report back, including their written comments.

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

Below are the written comments:

How do we fund services – adding transit, bicycle, pedestrian improvements
Multimodal needs to be considered at all levels for whole system
Transit will be used for mitigation effort for tolling funds are restricted to how do we find mitigation
Primary mitigation $ needs to be focused on transit
Pair mitigation and mobility plans with tolling projects and include identified funding sources for raw implementation
Coordinate with LCDC and DEQ to create communities where people spend less than 2 hours/day getting to work, school, chores, and leisure
No practical funding mechanisms exist to increase transit coverage, mobility options do not exist in many areas of the region
Set rates for congestion pricing at a level that will manage congestion and reduce VMT
Develop state policies and laws to connect highway and multimodal spending
Consider high benefits subsidies or discounts for people with low income and people of color
Create options for modes that must use the highways and corridors – freight, transit, etc.
VMT per capita

How do we know what a successful implementation of this policy looks likes?

Need to measure mobility at neighborhood scale – not just as level of pricing (state, regional, arterial)

Consider land use

Pay attention to seamless connectivity between multimodal and transit as a reliability facet

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

The following summarizes the group's discussion of the policy:

- The system won't be equitable if there are few mobility options; places with few transit options are not equitable. The mobility policy should promote a multimodal system.
- These are significant issues that need more discussion than through sticky notes. There needs to be more robust discussion and an opportunity to amend the language of each policy.
- Need to define equity with a deeper meaning and richer context.
- These policies could benefit from using a trauma-based decision-making process.

Below are written comments:

Replace integrated with centering

Say more on why equity should be centered

Make more specific

Include reference to race

Disability, equity is also important

Consideration of those unbanked

Policy needs to speak to ODOT and PBOT plans but also other local jurisdictions/projects

Measure outcomes to ensure impacts aren't disproportionate – BIPOC

BIPOC individuals and communities and low-income individuals and communities receive a greater-than-proportional share of benefits and pay a less-than-proportional share of costs

Be clear on recipient of the benefit

Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low income or in equity focus areas

Trauma based decision making for policy (EMAC)

All transit options to be considered

Ensure no criminalization related to unpaid tolls

Equity should include travel options such as transit not just car dependent single occupant vehicles (SOV's) with discounts

Use language that promotes economic justice

How do we develop a fareless transit system?

These comments are influenced by ODOTs low income report

Toll exemption should be offered at 400%

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

Below are the written comments:

- The phrase "reduce automobile trips" is irrelevant (delete)
- Freight-diversion into neighborhoods – bigger harm
- Without mobility options diversion will continue to cause accidents and hold our communities hostage
- Add concepts of health/safety, travel safety, social safety (be as specific as possible); each safety mode requires specific elements
- How does this safety policy apply to corridor or parking policy flavors of congestion pricing?
- Traffic and community safety
- Are cars (automobiles) unsafe?
- Enforcement = safety issues

Replace automobile with vehicle

Personal information safety

Divert unsafe driving behavior to an exit before a gantry – safety of design of system

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

Below are the written comments:

- Air quality issues – push into other areas
- Diversion impacts also to consider impacts on neighborhoods even if not high injury corridors
- Price model has to be set to minimize diversion
- The policy needs to be clear on how congestion pricing will support multi modal investments
- Diversion needs to be tracked and monitored using Bluetooth
- Establish minimum standards prior to tolling; without mobility options, diversion will happen
- Have a clear/broader definition of corridor

Make sure investments will reduce emissions

Establish VMT per capita

True definition of diversion should include all distances including short trips

Neighborhood streets – mobility in neighborhoods

Short local trips add tremendous congestion. Prioritize creating reliable, attractive, low-carbon short trip options in neighborhoods and communities

What price gets us to highest revenue without prompting diversion?

Prepare for diversionary impacts – get ahead of arterials that will experience diversion

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

Below are the written comments:

the word "reducing" does not clearly define a target.

Identify pathways/low-carbon options – need options

Measure VMT/per capita

Account for future growth

Action items – focus on corridor-specific work while considering areas with an absence of service

Limit GHG to X tons; limit VMT to y; specific #

Ensure GHG reductions are planned for, measurable and monitored throughout the life of tolling project

Reduce GHG benchmarks

No funding mechanisms exists to expand travel options, until funding exists we will not accomplish our climate goals

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

Below are the written comments:

Coordinate also with public information (which is very tech dependent)

Prioritize low-cost, high impact technology first (aka TSMO)

Not just "emerging" but all technologies; some old tech still works

Create varied and accessible means of payment and enrollment including options for people without access to the internet or banking services

Additional Thoughts

Below are additional feedback and comments collected during the workshop:

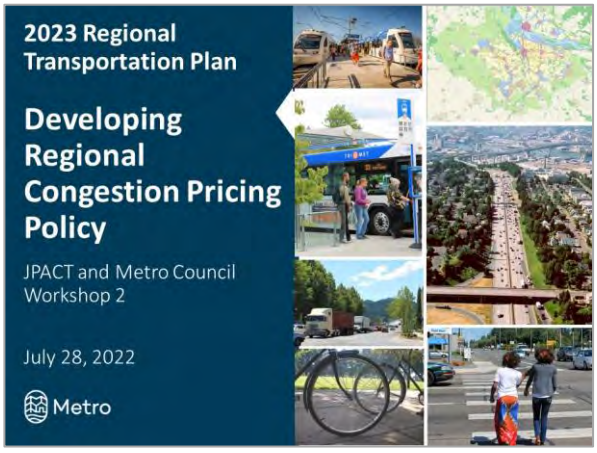
- RTP definition for equity
- Need to address/settle long-term funding mechanism for transportation (inevitable decline in gas/diesel/taxes). Ideal opportunity to integrate transit into "transportation"
- Peak commute times drives this – work with employers to distribute hours
- Ensure region is in alignment before ODOT bonds (makes promises)
- For any of the three projects
    - Issues that can't be consolidated for complicated topics
    - Make decision with people to make the policy built for everyone
    - Coordinate with employers to spread out peak commute hours
    - Stigma or stratification related to discounts
- Funding/toll to fund transit

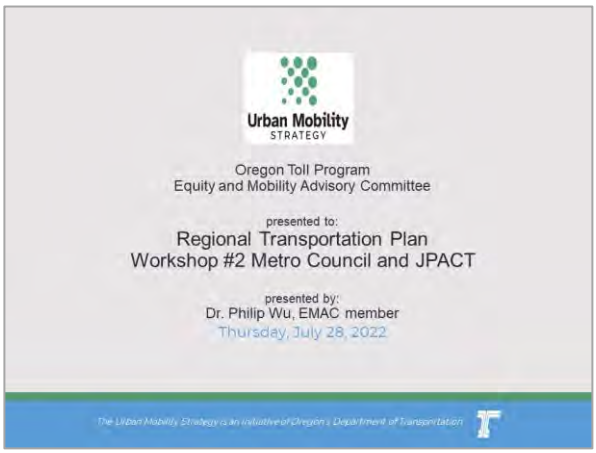
Next Steps & Closing

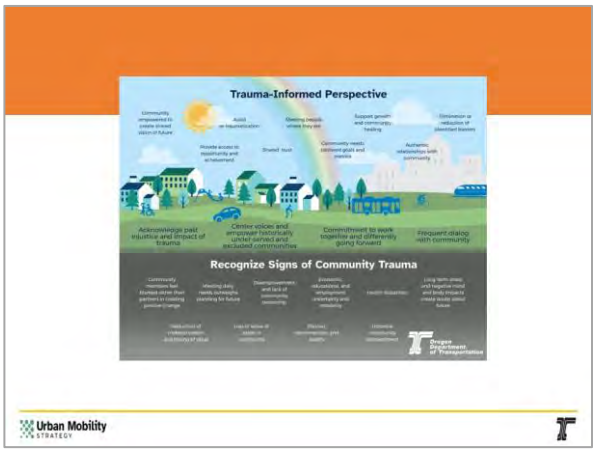
Metro Councilor Craddick closed the meeting and thanked everyone for their time and having this joint conversation between Metro and JPACT. The team will summarize the feedback and share it with the representatives for their comments.

The next workshop is scheduled for September and conversations will continue through the fall. Councilor Craddick shared Kim Ellis' contact information and encouraged those on live stream to provide feedback.

Appendix A: PowerPoint Slides



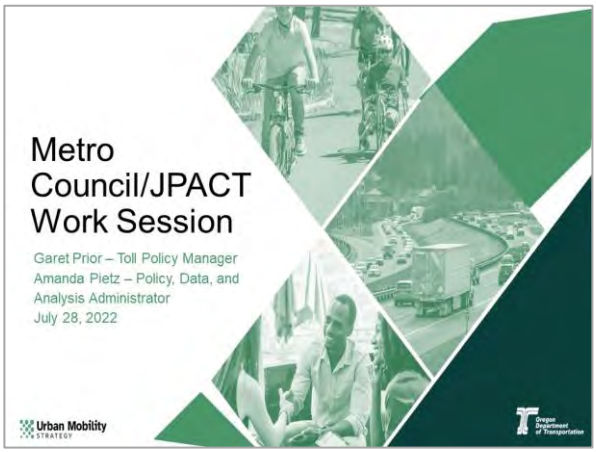



Trauma-Informed Perspective
Recognize Signs of Community Trauma
Urban Mobility STRATEGY


Equity and Mobility Advisory Committee's
July 2022 Recommended Actions
Congestion Management
Revenue Generation Strategy
Business Investment
Accountability (RAC and Rate Setting)
Accountability (2025 and Beyond)
Urban Mobility STRATEGY


Urban Mobility STRATEGY
THANK YOU!
The Urban Mobility Strategy is an initiative of Oregon's Department of Transportation


Context and Background
Oregon Highway Plan Tolling Policy Amendment
Amanda Pietz
Policy, Data, & Analysis Division Administrator, ODOT
Garet Prior
Tolling Policy Manager, ODOT


Metro Council/JPACT Work Session
Garet Prior – Toll Policy Manager
Amanda Pietz – Policy, Data, and Analysis Administrator
July 28, 2022
Urban Mobility STRATEGY


Oregon Highway Plan Toll Policy Amendment
Oregon Department of Transportation

Context

- Current policy, adopted in 2012, needs to be updated address current climate, equity, and administrative goals
- The policy will:
  - Define key terms and types of road pricing
  - Clarify the need and goals
  - Provide guidance on rate setting and uses of revenue

Oregon Department of Transportation

Overview

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

Oregon Department of Transportation

Schedule

Oregon Department of Transportation

Next steps

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

Oregon Department of Transportation

Low Income Toll Report

Urban Mobility STRATEGY

www.OregonTolling.org

Oregon Department of Transportation

Equity and Mobility Advisory Committee & Oregon Transportation Commission

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

Urban Mobility STRATEGY

www.OregonTolling.org

Oregon Department of Transportation

Options for consideration

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

Urban Mobility STRATEGY

Income Thresholds

2021 Federal Poverty Level (FPL)

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

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

Urban Mobility STRATEGY www.OregonTolling.org

Next Steps

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

Urban Mobility STRATEGY

2023 Regional Transportation Plan

Developing Regional Congestion Pricing Policy

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RTP Congestion Pricing Policy Development

JPACT and Metro Council Workshop 2

July 28, 2022

Planning Context

Multiple plans identify the need since 2000 RTP

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

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

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

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Project Context

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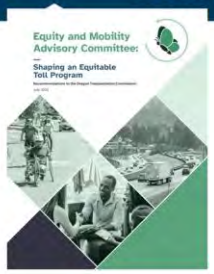
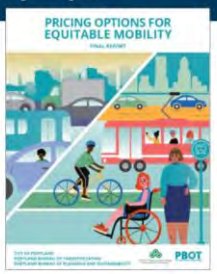
Community Input





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Regional Congestion Pricing Study

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

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Regional Congestion Pricing Study

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

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

Jennifer Wieland - moderator
Managing Director. Expert in congestion pricing and equity-focused studies
Nelson\Nygaard

Daniel Firth
Transport and Urban Planning Director; Congestion pricing leader in London, Stockholm and Vancouver
C40

Sam Shwartz
Founder and CEO; Father of NYC congestion pricing
Sam Schwartz Transportation Consultants

Rachel Hiatt
Assistant Deputy Director for Planning; Project manager of the Downtown Congestion Pricing Study
San Francisco County Transportation Authority

Christopher Tomlinson
Executive Director; Expert in political, policy and legal aspects of tolling
State Road and Tollway Authority, Georgia Regional Transportation Authority, Atlanta-region Transit Link Authority

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

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RCPS Resolution

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

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Committee Work To Date

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

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What We've Heard

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

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Next Steps – RTP Update

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

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

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Next Steps – RTP Update

9.02.22	TPAC	Revised 2023 RTP Policy and Action Items
9.13.22	Council Work Session	
9.15.22	JPACT	
9.21.22	MTAC	
9.28.22	MPAC	

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Draft RTP Congestion Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.	Policy 4	**Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 2	**Equity**: Integrate equity and affordability into pricing programs and projects from the outset.	Policy 5	**Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 3	**Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.	Policy 6	**Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

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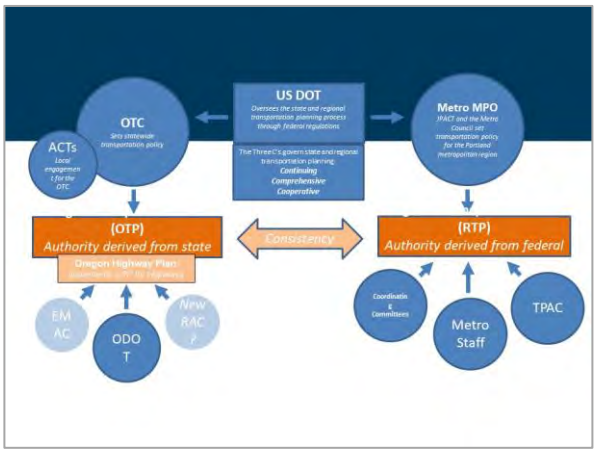
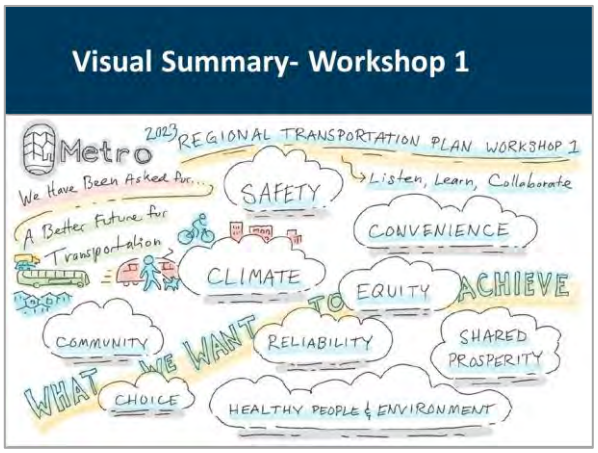
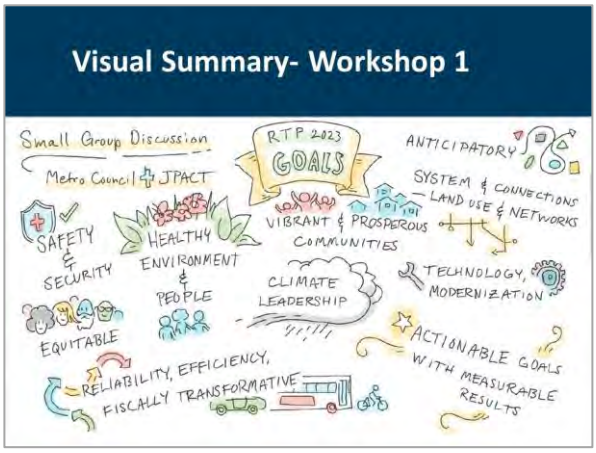
Learn more about the Regional Transportation Plan at:

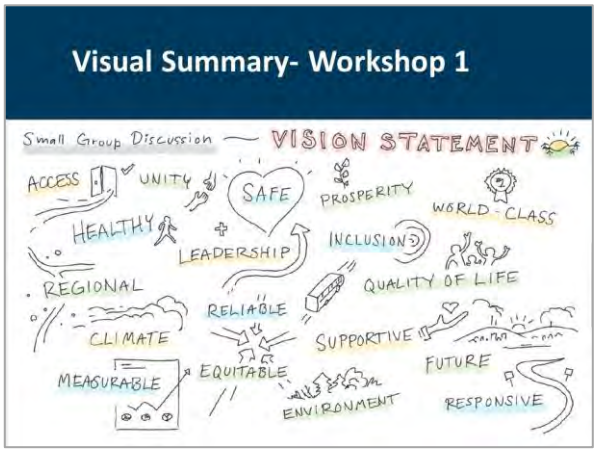
oregonmetro.gov/rtp

Alex Oreschak, RTP Congestion Pricing Policy Lead: alex.oreschak@oregonmetro.gov
Kim Ellis, RTP Project Manager: kim.ellis@oregonmetro.gov









Small Group Activity

Table discussions – 4 rounds

What do you like?

Will these policies help us achieve our goals for the future of transportation?

How would you update these policies?

Report back and group discussion

THANK YOU & NEXT STEPS

RTP workshop series for JPACT and the Metro Council

1. 6/30/22 — Updating Our Vision and Goals For the Future of Transportation
2. 7/28/22 — Developing Regional Congestion Pricing Policy
3. 9/29/22 — Creating Safe and Healthy Urban Arterials
4. 10/27/22 — Strengthening the Backbone of Regional Transit
5. 11/10/22 — Working Together to Tackle Climate Change

MARK YOUR CALENDARS!

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

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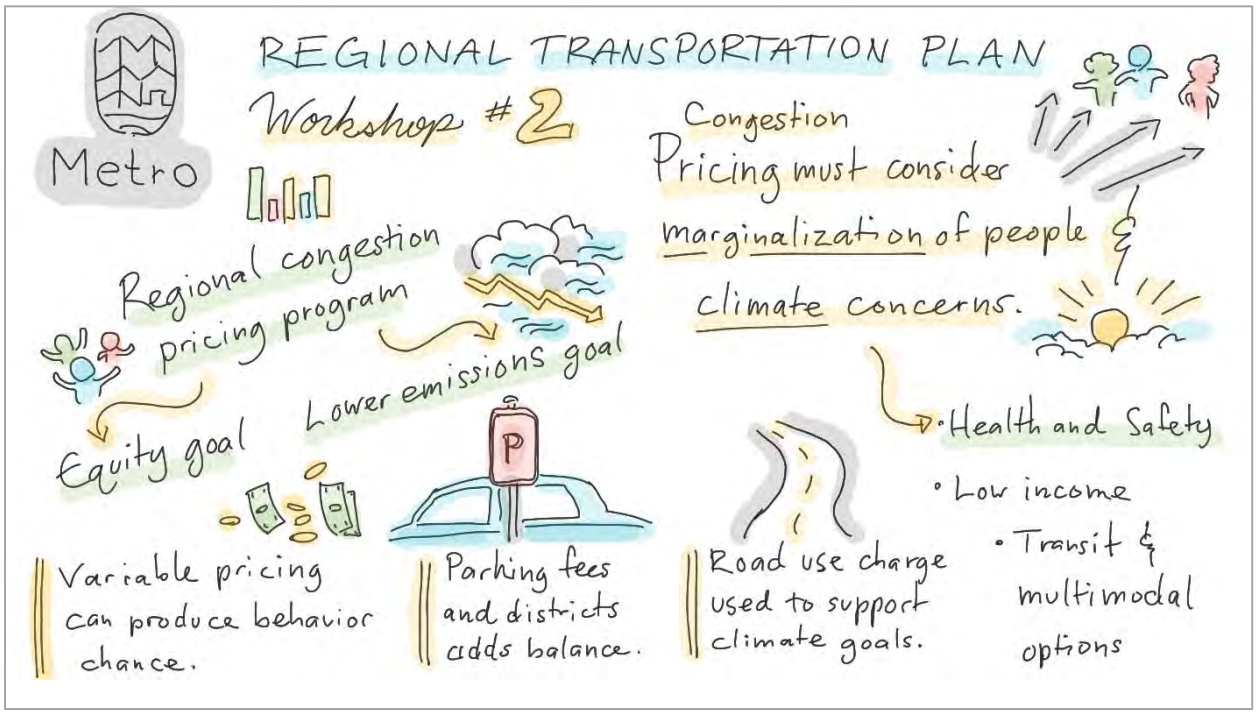
Learn more about the Regional Transportation Plan at:

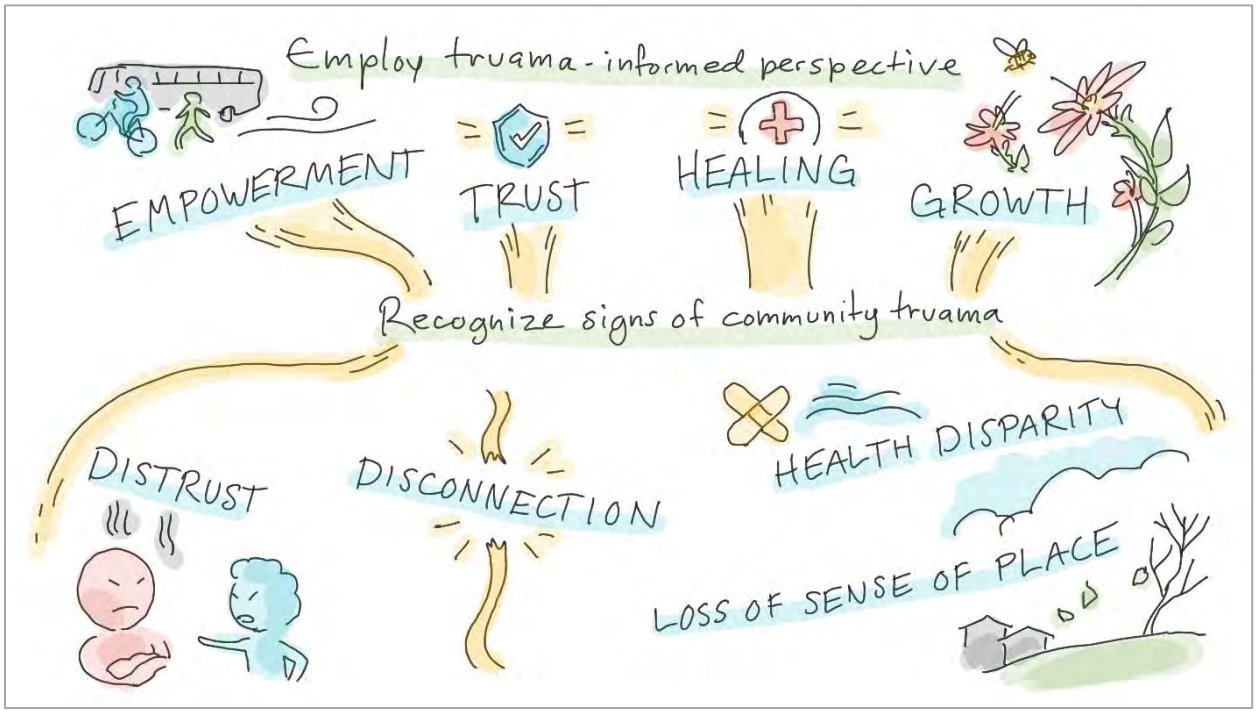
Metro

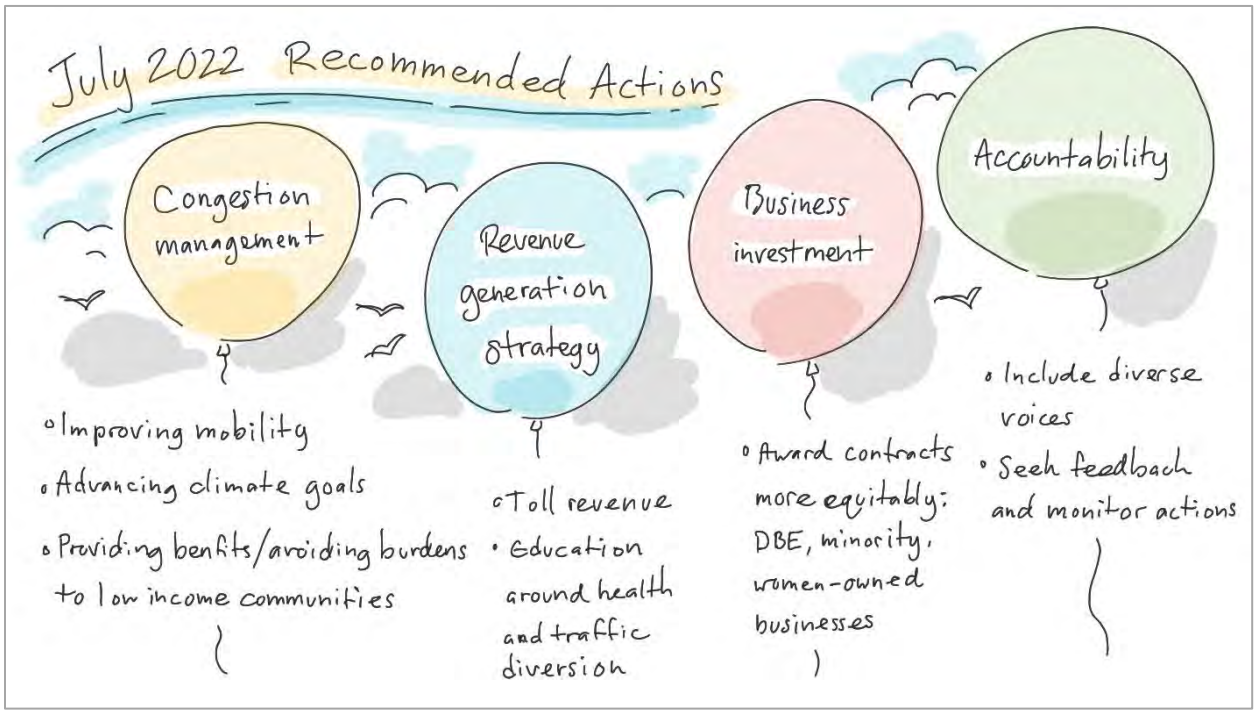
Kim Ellis, AICP
RTP Project Manager
kim.ellis@oregonmetro.gov

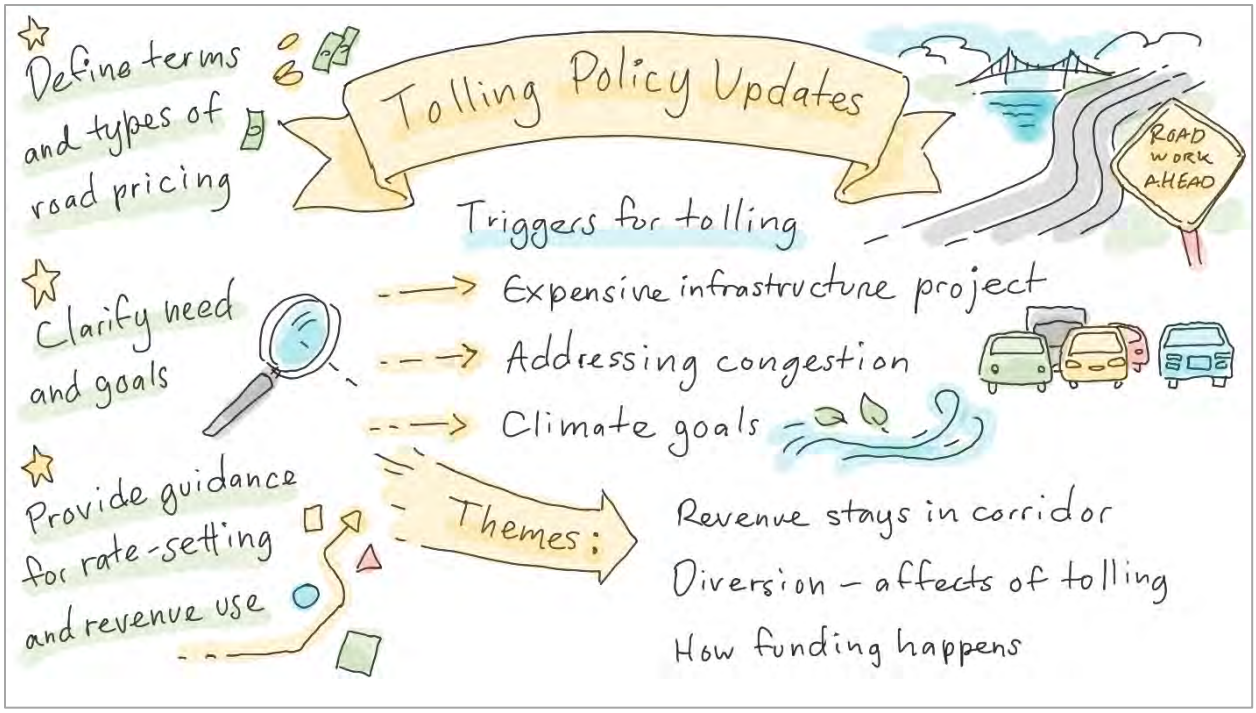
oregonmetro.gov/rtp

Appendix B: Visual Illustrations

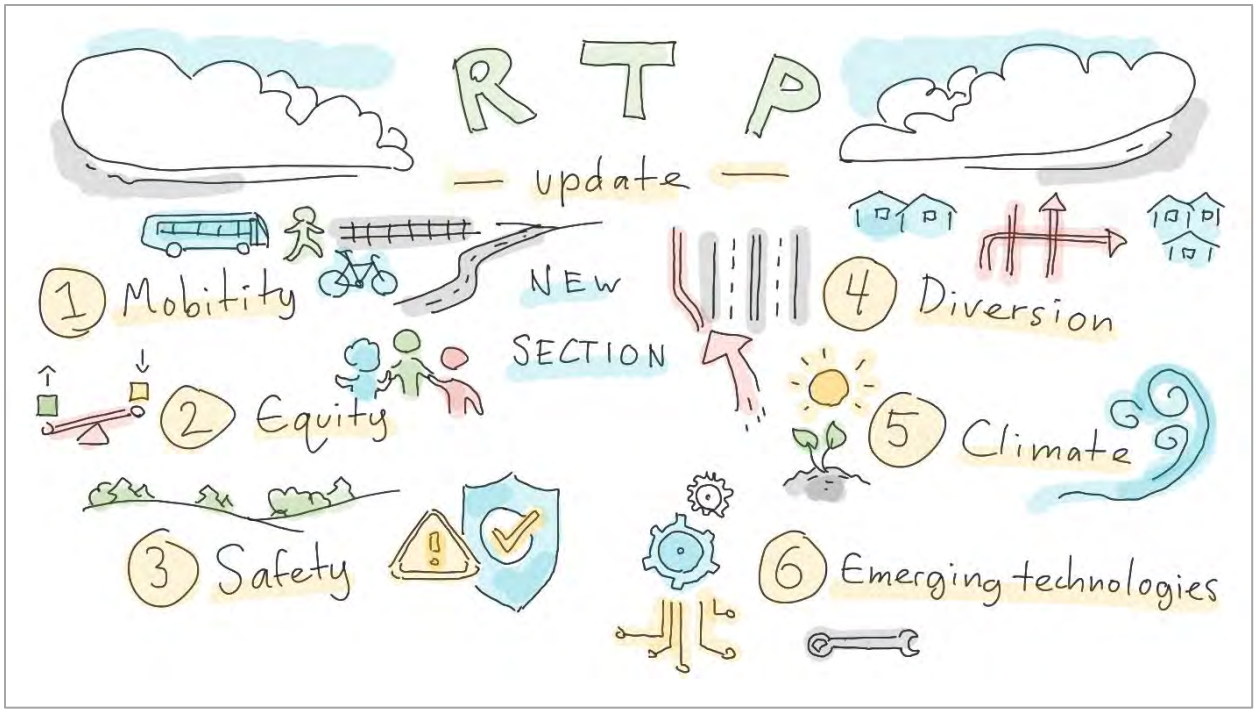





July 2022 Recommended Actions
Congestion management
Revenue generation strategy
Business investment
Accountability
• Improving mobility
• Advancing climate goals
• Providing benfits/avoiding burdens to low income communities
• Toll revenue
• Education around health and traffic diversion
• Award contracts more equitably: DBE, minority, women-owned businesses
• Include diverse voices
• Seek feedback and monitor actions


Tolling Policy Updates
Define terms and types of road pricing
Clarify need and goals
Provide guidance for rate-setting and revenue use
Triggers for tolling
Expensive infrastructure project
Addressing congestion
Climate goals
Themes:
Revenue stays in corridor
Diversion – affects of tolling
How funding happens
ROAD WORK AHEAD


Trust barriers: low-income toll pricing
Options for consideration
Provide discount for households at or below 200% federal poverty
Provide smaller, focused discount for 201% - 400%
Use certification leveraging existing programs
we heard loud and clear:
METRO & ODOT
should work together


RTP
— update —
1 Mobility
NEW SECTION
4 Diversion
2 Equity
5 Climate
3 Safety
6 Emerging technologies

Appendix C: Other Resources

Meeting:	JPACT & Metro Council RTP Workshop 2
Date:	Thursday, July 28, 2022
Time:	7:30 a.m. to 9:30 a.m.
Place:	Conservation Hall of the Oregon Zoo, 4001 SW Canyon Rd, Portland, OR 97221
Livestream:	https://youtu.be/-mF1lCXAWP8; Telephone 877-853-5257 (Webinar ID: 831 1110 7022
Purpose:	Discuss Congestion Pricing Policy being developed for 2023 Regional Transportation Plan.
Outcome(s):	Feedback on draft congestion pricing policies for 2023 RTP.

7 a.m. **Venue opens**

- Optional breakfast & mingling.

7:30 a.m. **Welcome & Introductions**

- Councilor Craddick, JPACT Chair
- Metro Council President Lynn Peterson

7:45 a.m. **Context and Background**

- ODOT & City of Portland Equity & Mobility Committees
  - Esme Miller, POEM member (video)
  - Dr. Phillip Wu, EMAC member
- Oregon Highway Plan Tolling Policy Amendment presentation
  - Garet Prior, Toll Policy Manager, ODOT
- Congestion Pricing Presentation
  - Margi Bradway, Deputy Director of Planning, Development & Research, Metro
  - Alex Oreschak, Senior Transportation Planner, Metro

8:15 a.m. **Small group discussion: Congestion Pricing Policies**

- 6/30 Workshop review
- Small group breakout
- Report back

9:15 a.m. **Next steps**

9:25 a.m. **Thank you/adjourn**

- Councilor Craddick, JPACT Chair

2023 REGIONAL TRANSPORTATION PLAN

JPACT and Metro Council Workshop Series

A series of monthly in-person workshops will take place for JPACT members or alternates and the Metro Council to discuss critical elements of the 2023 Regional Transportation Plan.

Due to COVID-19, non-essential staff and members of the public are invited to observe via an online livestream on YouTube. Phone call-in options are not available. Find the workshop livestream information at **oregonmetro.gov/calendar**

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

1

Updating Our Vision and Goals for the Future of Transportation

Discuss our vision and goals for the future of transportation

Outcome: Provide feedback on updating the vision and goals for the transportatio system serving greater Portland

June 30, 2022

2

Developing Regional Congestion Pricing Policy

Discuss proposed regional congestion pricing policies that build on findings and recommendations from Metro's Regional Congestion Pricing Study

Outcome: Provide feedback on draft policies for congestion pricing in the region

July 28, 2022 7:30-9:30 a.m.

3

Creating Safe and Healthy Arterials

Explore regional challenges and opportunities for making our major streets safe and healthy for everyone

Outcome: Provide feedback on addressing the challenges of major streets in the RTP update

Sept. 29, 2022 7:30-9:30 a.m.

4

Strengthening the Backbone of Regional Transit

Explore options for advancing our high capacity (fast, reliable) transit vision

Outcome: Provide feedback on corridors to be considered for high capacity transit investment, including which are most important today and in the future

Oct. 27, 2022 7:30-9:30 a.m.

5

Working Together to Tackle Climate Change

Discuss progress implementing the region's adopted Climate Smart Strategy

Outcome: Provide feedback on policies and investments needed to significantly reduce carbon emissions from our transportation system

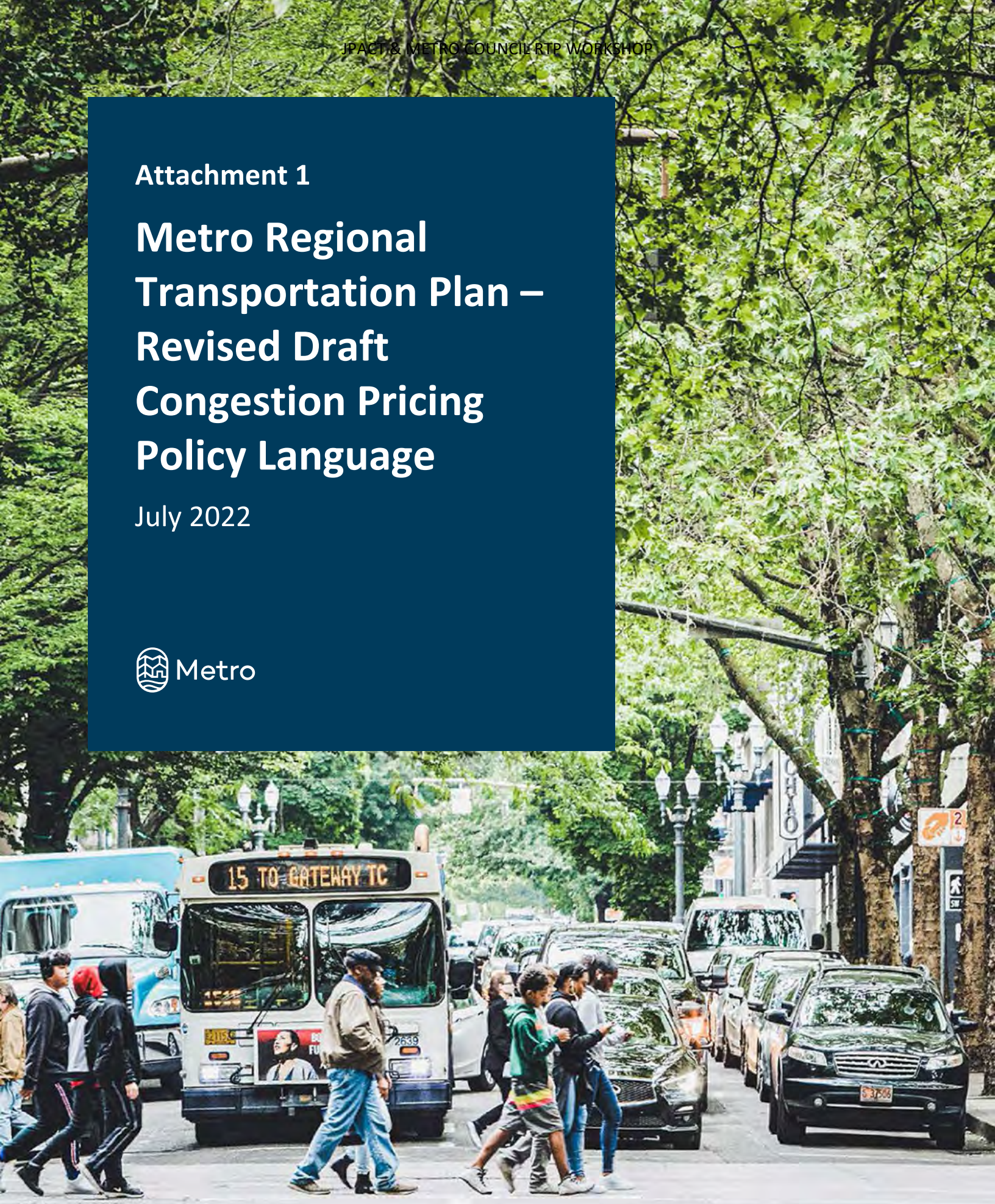
Nov. 10, 2022 7:30-9:30 a.m.

Attachment 1

Metro Regional Transportation Plan – Revised Draft Congestion Pricing Policy Language

July 2022

Metro



3.2.5 Congestion pricing policies

Placeholder for Congestion Pricing Background and Context

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

3.2.5.1 Congestion Pricing Policies

The draft congestion pricing policies are provided below.

Congestion Pricing Policies

Policy 1	**Mobility**: Improve reliability and efficiency by managing congestion, reducing VMT, and increasing transportation options through investments in modal alternatives, including transit-supportive elements and increased access to transit.
Policy 2	**Equity**: Integrate equity and affordability into pricing programs and projects from the outset.
Policy 3	**Safety**: Ensure that pricing programs and projects reduce overall automobile trips and address traffic safety and the safety of users of all modes, both on and off the priced system.
Policy 4	**Diversion**: Minimize diversion impacts before, during, and after pricing programs and projects are implemented, especially when diversion is expected on the regional high injury corridors.
Policy 5	**Climate**: Reduce greenhouse gas emissions and vehicle miles travelled while increasing access to low-carbon travel options when implementing a pricing program or project.
Policy 6	**Emerging Technologies**: Coordinate emerging technologies and pricing programs to create an integrated transportation experience for the users of the system.

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

Action Items:

- Set rates for congestion pricing at a level that will manage congestion and reduce VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Collaborate with regional and local agencies and communities when setting, evaluating, and adjusting mobility goals.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that encourage mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify opportunities to partner with other agencies to fund or construct modal alternatives. Work with transit agencies and other local partners, including coordination with the High Capacity Transit Strategy, to determine additional revenue needs and pursue funding needed to develop transit-supportive elements, expand access to transit, and to ensure equitable investments, particularly in cases where such improvements cannot be funded directly by congestion pricing revenues due to revenue restrictions.
- Consider non-infrastructure opportunities to encourage mode shift and reduce VMT, including commuter credits, funding for transit passes, bikeshare and/or micromobility subsidies, partnerships with employer commuter programs, and carpooling and vanpooling. Consider higher benefits, subsidies, or discounts for people with low-income and people of color.

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

Action Items:

- Conduct general public engagement in a variety of formats, including formats that accommodate all abilities and levels of access to technology. Begin engagement at an early stage and re-engage the public in a meaningful manner at multiple points throughout the process.
- Engage equity groups, people with low-income, and people of color (equity groups to be defined through the 2023 RTP update) in a co-creation process, beginning at an early stage, to help shape goals, outcomes, performance metrics, and reinvestment of revenues.
- Use a consistent definition of equity and equity areas, such as Equity Focus Areas. A consistent methodology for documenting benefits and burdens of pricing for equity groups, people with low-income, people of color, and Equity Focus Areas should be established across agencies. The methodology should consider a variety of factors, such as costs to the user, travel options, travel time, transit reliability and access, diversion and safety, economic impacts to businesses, noise, access to opportunity, localized impacts to emissions, water and air quality, and visual impacts.

- Establish feedback mechanisms, a communication plan, and recurring regular engagement over time with equity groups that were involved in the co-creation process.
- Provide a progressive fee structure which includes exemptions or discounts for qualified users. Base eligibility on inclusion in one or more population categories, such as low-income or identifying as a person of color, and minimize barriers to qualification by building on existing programs or partnerships where applicable
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Reinvest a portion of net revenues from congestion pricing into communities with high proportions of people with low-income and people of color, and/or in Equity Focus Areas. Examples include commuter credits and free or discounted transit passes, or improved transit facilities, stops, passenger amenities, and transit priority treatments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying traffic safety impacts and mitigations.
- Use a data-driven approach to identify potential traffic safety impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust safety strategies based on monitoring and evaluation findings.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage safety issues caused by pricing projects.
- Develop plans or contingencies for severe weather operations, evacuations during disaster, and construction detours.
- Pricing programs or projects should strive to reduce fatalities and serious injuries by aligning with the RTP's safety and security policies identified in Section 3.2.1.4
- Evaluate and mitigate for impacts from pricing on high injury corridors, including changes in VMT from diversion and opportunities to improve safety on high injury corridors through investments in modal alternatives and other safety investments.

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

Action Items:

- Collaborate with regional and local agencies and communities when identifying diversion impacts and mitigations.

- Use a data-driven approach to identify potential diversion impacts on local streets both during and after implementation of pricing projects; monitor with real-time data after implementation.
- Evaluate localized impacts of diversion including factors such as VMT on local streets, VMT in defined equity areas, noise, economic impacts to businesses, and localized emissions, water quality, and air quality.
- Monitoring and evaluation programs should be on-going and transparent. Establish feedback mechanisms and a communication plan in advance for the community and decision makers.
- Adjust mitigation strategies based on monitoring and evaluation findings. Areas impacted may change as the pricing program is implemented and diversion mitigation strategies are put into place.
- Reinvest a portion of net revenues into areas in or near the area being priced to manage diversion caused by pricing projects.

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

Action Items:

- Set rates for congestion pricing at a level that will reduce emissions by managing congestion and reducing VMT on the priced facility while limiting diversion to nearby unpriced facilities, including arterial, collector, and local streets in the project area.
- Consider localized emissions impacts resulting from diversion or other changes in travel patterns.
- Reinvest a portion of net revenues from congestion pricing in modal alternatives both on and off the priced facility that can reduce emissions by encouraging mode shift and VMT reduction, including transit improvements as well as bicycle and pedestrian improvements and improvements to local circulation.
- Identify how congestion pricing can address and support the RTP's climate leadership goals and objectives and Climate Smart Strategy policies.

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

Action Items:

- Coordinate with other existing and proposed pricing programs and emerging technologies for payment systems to reduce burdens on the user and manage the system efficiently, including setting rates, identifying tolling technology and payment systems, and establishing discounts and exemptions.
- Create varied and accessible means of payment and enrollment, including options for people without access to the internet or banking services.
- Consider the upfront costs of technology investment balanced with long-term operational and replacement costs compared with expected revenue generation.

- Weigh existing and emerging equipment and technological advancements when making technology choices, balancing what is time-tested versus what may become obsolete soon. Technology and programs which do not require users to opt-in or track miles manually, for instance, are more likely to see greater compliance.
- Review existing laws and regulations to confirm the ability and authority to enforce the selected program and install the selected technology. Technology and enforcement methods must not be in violation of existing laws or city codes, such as prohibition of certain equipment on sidewalks or within city boundaries.

3.2.5.2 Defining Key Terms

Key terms will be included in the RTP glossary.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

investments in transit-supportive elements and increased access to transit and other modal alternatives. ~~manage travel demand on the transportation system in combination with adequate transit service options.~~

- Remove definition of pricing strategies and discussion of ODOT work on congestion pricing.

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

2023 REGIONAL TRANSPORTATION PLAN WORKSHOP 1

Metro

Listen, Learn, Collaborate

We Have Been Asked for...

A Better Future for Transportation

SAFETY

CONVENIENCE

CLIMATE

EQUITY

ACHIEVE

TO

WHAT WE WANT

COMMUNITY

RELIABILITY

SHARED PROSPERITY

CHOICE

HEALTHY PEOPLE & ENVIRONMENT

Small Group Discussion

Metro Council + JPACT

RTP 2023 GOALS

- SAFETY & SECURITY
- HEALTHY ENVIRONMENT & PEOPLE
- VIBRANT & PROSPEROUS COMMUNITIES
- ANTICIPATORY SYSTEM & CONNECTIONS — LAND USE & NETWORKS
- CLIMATE LEADERSHIP
- TECHNOLOGY, MODERNIZATION
- EQUITABLE
- RELIABILITY, EFFICIENCY, FISCALLY TRANSFORMATIVE
- ACTIONABLE GOALS WITH MEASURABLE RESULTS

Small Group Discussion — VISION STATEMENT

Equity and Mobility Advisory Committee (EMAC) Recommendations for July 2022 Oregon Transportation Commission Action

The Equity and Mobility Advisory Committee (EMAC) advises the Oregon Department of Transportation (ODOT) and the Oregon Transportation Commission (OTC) on creating a process for delivering equitable outcomes on the I-205 Toll Project and Regional Mobility Pricing Project. As is described in the Equity Framework, our work informs guidelines, strategies, processes, and policies to advance equity with implementable measures before and after tolling begins.

The following questions guide collaboration with ODOT and the OTC on structure and execution of an equitable public process before and after tolling begins. These are also intended to help determine whether equity is advanced through the Toll Program by ODOT and the OTC:[1]

- **Rate** – What is the toll rate and the relative cost burden across aggregated demographic populations?
- **Revenue** – How and where is toll revenue invested?
- **Responsibility** – Who is responsible for long-term oversight and adjustments of the toll program? How will those responsible demonstrate transparency and accountability?

Request of the Oregon Transportation Commission in July 2022

We respectfully request that the Oregon Transportation Commission (OTC) join us in partnership this July by supporting our recommended actions. **By supporting these actions, the OTC would provide strategic direction to ODOT to center equity using these actions as the basis for future decisions.**

We know that ODOT has more work to do to take the strategic direction provided in these actions and work to operationalize and implement. We look forward to working with the OTC and ODOT in that process.

These actions build from and connect to the Foundational Statements, which EMAC and OTC supported in November 2021. The following pages include the Foundational Statements and each recommended action notes which statement(s) they address.

[1] For further context for the recommendations that follow in this document, when EMAC refers to equitable benefits, we mean not just for the residents of Oregon, but also of southwest Washington.

Foundational Statements

The Foundational Statements will serve as building blocks for the Equity and Mobility Advisory Committee's (EMAC) recommendations to inform commitments from ODOT and the Oregon Transportation Commission (OTC) to advance equity through the Oregon Toll Program. To provide high-level consensus, the following Foundational Statements were developed by EMAC, in partnership with ODOT staff and unanimously supported by the OTC at their November 18, 2021 meeting:

1. Provide enough investment to ensure that reliable, emissions-reducing, and a competitive range of transportation options (bike, walk, bus, carpool, vanpool, etc.) are provided to advance climate, safety, and mobility goals, and prioritize benefits to Equity Framework communities.

2. Climate and equity needs are connected and solutions must be developed to address both at the same time. Further works needs to done to support both congestion management and vehicle miles traveled (VMT) reduction with an emphasis on increasing functional alternatives to driving, while not increasing diversion nor heavily impacting low-income car-dependent people.

3. There must be toll-free travel options available to avoid further burdening people experiencing low-incomes who are struggling to meet basic needs (food, shelter, clothing, healthcare).

4. To the greatest degree possible, investments that are necessary to advance equity must be delivered at the same time as highway investments and be in place on day 1 of tolling or before. Additional work needs to be completed to identify these investments.

5. Tolling must be a user-friendly system that is clear and easy to use by people of all backgrounds and abilities, including linguistic diversity, and those without internet access.

6. Equitable benefits that are offered in Oregon must extend into Southwest Washington.

7. Although the toll projects will have a statewide impact, they must be developed in coordination with regional partners to build an equitable and successful transportation system, together.

Congestion management approach

We understand the dual goals of the Oregon Toll Program: manage congestion and raise revenue for investments. We also know there are many paths to achieving and defining these goals, and we want to see greater clarity.

We believe that we cannot build our way out of congestion. To effectively address congestion, ODOT must prioritize managing system demand, with an emphasis on encouraging travel outside of peak-commute hours, reducing the number of vehicle trips taken, and increasing the use of higher-capacity and climate-friendly modes that can effectively move many more people with fewer cars. We recognize and support the definition of demand management as re-designing and operating the system to reduce congestion on the highways through tiered pricing and investment in transportation options, including the promotion of carpooling, vanpooling, and mass transit.

We recognize the relationship between congestion pricing, equity and meeting climate action goals. We have worked to identify a wide range of multi-faceted strategies to equitably maximize the benefits of congestion pricing. We see this as a real opportunity to move the needle on core state and regional goals – and doing so in such a way that minimizes harm and provides disproportionate benefits to Equity Framework communities.

We acknowledge the delicate balance in setting toll rates. Raising the price too much for reinvestment and climate goals could burden populations already struggling with the region's high cost of living and increase diversion impacts to communities surrounding the highway. Keeping the price too low could leave us with no benefits from congestion pricing while traffic congestion burdens continue.

Recommended Action #1 (connects to Foundational Statements 1, 2, 3, and 7)

The following goals should guide ODOT's decisions on tolling related to congestion management, including design, setting rates, monitoring, and adjusting tolls, with an emphasis on avoiding disproportionate burdens and focusing on benefits among Equity Framework communities:

- Price the system to maximize efficiency of the toll corridors, emphasizing moving as many people as possible in the existing lanes, coupled with robust investments by ODOT and regional partners in reliable, emissions-reducing, and a competitive range of transportation options (bike, walk, bus, carpool, vanpool, etc.) to advance climate, safety, and mobility.
- Limit freight and longer-trips diverting into local communities.
- Improve access to jobs, healthcare services, education, recreation and natural spaces.
- Improve air quality and reduce Greenhouse Gas (GHG) emissions.
- Reduce vehicle miles traveled (VMT) per capita.
- Increase mode shift from single-occupancy vehicles to higher-occupancy vehicles or transit.
- Price the system so that lower-income households pay a lower percentage of household income than middle and upper-income households pay.

Revenue generation approach

We understand that tolling alone cannot and should not bear the sole weight for raising enough revenue for investments to address past wrongs and existing disparities. We see the overarching goal to deliver major projects identified by the Oregon Legislature (raise revenue for infrastructure) and finance reliable, convenient, emissions-reducing, competitive, and health-promoting transportation options (bike, walk, bus, carpool, vanpool, etc.) with an emphasis on addressing the needs of historically excluded and underserved communities.

How toll revenues are invested is an essential question to determine if or how the Program advances equity. Without agreements or direction at this time, which could inform the official toll rate-setting process, we are concerned that there will not be adequate money left to address the needs and concerns of Equity Framework Communities.

We agree that congestion pricing through variable rate tolls, is needed on I-5 and I-205, and we understand that the OTC and ODOT must deliver major projects identified by the Oregon Legislature. We understand that investment-grade traffic and revenue analysis is not conducted until around six months before the final toll rates are set. Without the fine-tuned traffic and revenue analysis data available, we believe that the OTC must adopt a priority framework to guide ODOT and the future toll rate setting process.

We have routinely heard that people are worried about the increased cost of travel on their budget and community, especially on those experiencing financial hardship (low-income). We support the lowest toll rate possible for people experiencing low income, and programs to reduce impacts and unintended consequences on people experiencing low-incomes. In creating an equitable system, we also consider the impacts on working class and middle-income families who do not have resilient finances.

We recognize that this may result in less toll revenue to fund various projects and programs, including needed programs or services to advance equity.

Recommended Action #2 (connects to Foundation Statement 1, 2, 3, and 7)

For the approach to revenue generation, the Oregon Transportation Commission should pursue the following strategy:

- Prioritize providing a substantial contribution to the low-income program (e.g., discounts, credits, or exemptions) to address affordability impacts for those with the least ability to pay.
- Select a rate schedule that emphasizes demand management and equity advancement.
- Maintain the lowest possible toll rates for everyone while generating sufficient revenue for Oregon Legislature-identified multi-modal capital investments and project mitigations (including for the low-income program).

Involving Disadvantaged Business Enterprises, Minority Business Enterprises, and Women Business Enterprises and community-based organizations

We anticipate that businesses whose workers and goods frequent I-5 and I-205 will be among the groups most affected by tolling. We need to balance the cost of tolls with the benefits of investments and managed congestion. At the same time, we must identify impacted Disadvantaged Business Enterprises (DBE), Minority Business Enterprises (MBE), and Women-Business Enterprises (WBE) and proactively reduce their burden. We know that securing and maintaining a job is critical to combating poverty.

As the toll program aims to improve mobility, environmental, and other outcomes, it must not lose sight of the implications for business districts and corridors where changes may occur – especially for DBE, MBE, and WBE that may not have the resources to adapt to major changes. Deep engagement and assessment of corridors and districts where significant changes are expected to occur, whether it be the direct or indirect impacts of vehicle trips, transit ridership, or other forms of travel, is essential. Preparing businesses for expected changes and helping buffer any negative impacts will help create a triple win for mobility, environment, and the economy.

Tolling and investment must create more jobs for women, small, and minority-owned businesses and in historically excluded communities.

Recommended Action #3 (connects to Foundational Statements 1, 4, and 7)

Identify and commit to a plan for increasing the percentage of dollars spent on Disadvantaged Business Enterprises, Minority Business Enterprises, and Women Business Enterprises that are awarded contracts for designing, building, and operating the toll system and projects supported by toll revenues.

Recommended Action #4 (connects to Foundational Statements 1, 4, 5, and 7)

Provide ongoing funding for community-based organizations (CBOs) that serve communities identified in the Oregon Toll Program's Equity Framework and that are impacted by tolling to support the following transportation-related activities including, but not limited to:

- CBO transportation services for carpool, vanpool, and other transportation programs building upon the concept of ODOT's newly created Innovative Mobility Program.
- Compensation for community members to participate in tolling-related transportation planning activities, projects, or committees.
- Toll education programs and ongoing engagement to inform the toll program.
- Increase enrollment in the Oregon Toll Program account holders and access to the low-income toll program.
- Include CBOs in the monitoring process to identify and help prioritize actions to address neighborhood health and safety issues caused by increased diversion of freight or longer-trips from tolling.

Accountability

We know that there are many other decisions the OTC will make before establishing the oversight and adjustment process for tolling. We recognize that achieving equity is a process over time; however, establishing an oversight and adjustment process is a high priority for EMAC at this time. We must have clarity and confidence that after our work in planning for tolling is done that ODOT will continue with the kind of community-grounded equitable planning approach that has made this process successful in our eyes to date.

We strive to ground our equity advancement work on the realities that Equity Framework Communities are facing, and on solid evidence, research, and analysis. We are doing our best to learn and provide recommendations based on community input, data, and best practices in the planning stage. We are also aware of the limitations of data, models, and other planning tools and that the actual benefits and impacts of tolling will need to be monitored once tolls are in place to really understand the effects of tolling on historically impacted and underserved communities and adjust accordingly.

These are our recommendations to advance equity based on what we know today. Actual impacts and benefits will need to be monitored once tolls are in place and implementation measures may need to be adjusted in the future.

As opposed to other transportation projects and plans where community engagement typically ends after the plan or project is finalized, tolling, as a programmatic strategy to manage congestion, offers an important opportunity to include community voice as roadway conditions, technology, toll revenues, and community needs and priorities shift over time.

A commitment to ongoing engagement and consultation with historically excluded and underserved community leaders and organizations in monitoring, reporting, and programmatic changes after tolling begins is an essential step to building community understanding, capacity, trust, accountability, buy-in, and support. It can also help planners and policymakers ground-truth data, and generally make more informed decisions.

We know that new committees are coming online soon. There will be a Rules Advisory Committee that ODOT will support to provide a recommendation directly to the OTC on toll rate setting and rules that govern important items like enforcement and operations of tolling. We want to ensure that equity will be prioritized in their important work.

Recommended Action #5 (connects to Foundational Statements 4, 6, and 7)

To center equity in the important rulemaking and I-205 Toll Project rate setting process, the following elements should be included:

- Include an EMAC member on the Rules Advisory Committee.
- The Rules Advisory Committee should include delegates on behalf of Equity Framework communities, people with lived or professional experience with equity. As delegates, committee members should be empowered to effectively and meaningfully participate in committee decision making.[2]
- EMAC should be provided with the investment-grade traffic and revenue analysis information and be given the opportunity to give feedback directly to the Rules Advisory Committee before they make a recommendation to the Oregon Transportation Commission.

Recommended Action #6 (connects to Foundational Statement 1, 2, 3, 5, 6 and 7)

Once tolls are in place and EMAC's work is complete, ODOT and the OTC should continue to support a toll equity accountability committee (that is separate and complementary to the Rules Advisory Committee) or establish another structure where equity voices are at the table in a consistent, transparent, and resource-supported way to ensure long-term accountability. Either the committee or another structure will review progress of the toll program over time to provide feedback and guidance to ODOT and the OTC to help advance equity processes and outcomes with tolling on I-5 and I-205.

The committee (or other entity) would monitor, evaluate, and provide feedback on the following:

- Equity commitments made to address EMAC's core intent: addressing issues of affordability, and the impact of diversion on neighborhood health and safety, and transit and multimodal transportation options.
- Equity commitments made as a part of mitigation in the I-205 and RMPP toll projects.
- Enrollment in and economic impacts of the low-income toll program over time.
- Disadvantaged Business Enterprise (DBE) commitments for workforce development and contracting of toll operations and projects funded by tolling.
- Improving ODOT's approach to equitable engagement and customer service practices.

[2] For further context about creating an inclusive and equitable decision making process, reference the Journal of American Planning Association's "Building That Well-Known Ladder For Citizen Participation."

PORTLAND'S PRICING OPTIONS FOR EQUITABLE MOBILITY

Why consider a new approach to pricing?

Between 2020-2021, the Portland Bureau of Transportation (PBOT) in partnership with the Bureau of Planning and Sustainability (BPS) convened a community task force to explore a complex question:

Could we use new pricing strategies in Portland to improve mobility, address the climate crisis and move toward a more equitable transportation system?

Our transportation system today doesn't work for everyone. And with 600,000 new residents expected to live in the Portland region by 2040, many of the problems we're experiencing now—like worsening traffic, rising carbon emissions, poor air quality and high crash rates—are due to get worse. These challenges disproportionately impact Black, Indigenous and other People of Color (BIPOC), Portlanders with low incomes, and people with disabilities.

Regional interest in pricing—sometimes called "congestion pricing," "value pricing" or "mobility pricing"—has increased in recent years as we grapple with how to combat these challenges and better manage our roads. Through the Pricing Options for Equitable Mobility (POEM) project, the City sought to understand if and how pricing could work here in Portland to advance our goals.

Pricing refers to strategies that involve charging people for driving or using roadway space. These charges can vary based on different factors, for instance, how congested the roads are, the time of day, income levels or what type of vehicle is using the road. By applying a charge, pricing can help people consider the impact of their travel choices and encourage different options (like carpooling, traveling at off-peak hours or using other, non-driving options when possible), which help to create a more efficient, more equitable and more sustainable system for all.

PRICING STRATEGIES EXPLORED THROUGH THE POEM PROJECT:

THE POEM COMMUNITY TASK FORCE

Between January 2020 and July 2021, the POEM Task Force—comprised of 19 community members representing diverse perspectives, interests and expertise from across Portland—met monthly to advise the City on if and how new pricing strategies could advance equitable mobility.

Over the course of these 18 months, the Task Force:

- **Learned about the history of transportation and mobility in our region** and why centering racial equity matters.
- **Developed a shared, working definition** of equitable mobility (see back).
- **Learned about how pricing strategies have been used in other places** and why they are being considered in Portland and the Metro region.
- **Explored five different typologies of pricing**, identifying opportunities, risks and questions for further analysis.
- **Reviewed preliminary modeling of different pricing strategies** and impacts on the transportation system.
- **Deliberated and adopted recommendations** for City leadership.

TASK FORCE RECOMMENDATIONS TO CITY LEADERSHIP

On July 12, 2021, the Task Force voted to adopt their recommendations to City leadership. A majority of members had to approve of a recommendation for it to advance, and all recommendations received support from at least 16 members of the 19-member Task Force. The following is a summary of the group's recommendations—a complete copy is available on the POEM website.

www.portland.gov/transportation/planning/pricing-options-equitable-mobility-poem#toc-poem-community-task-force

Principles for pricing for equitable mobility

Overarching themes that should apply to all future pricing policy analysis and development:

- Pricing holds promise as a strategy to help move people and goods in a more efficient, climate-friendly and equitable way, but ONLY if it is designed, implemented and adjusted with intention.
- The City should urgently advance pricing options for equitable mobility policies. Failure to act is not an option.
- The City should utilize the Equitable Mobility Framework (see back) to guide future pricing and transportation policy deliberations.
- Pricing is just one policy tool and not a standalone solution.
- The City should design future pricing strategies according to the following guidelines:
  - Prioritize the goal of reducing traffic demand.
  - Provide exemptions for households living on low incomes.
  - Center climate and equity outcomes.
  - Reinvest revenue generated from pricing in strategies that further expand equitable mobility.
  - Reduce unequal burdens of technology and enforcement.

Nearer-term pricing recommendations

Specific strategies the Task Force thinks the City should pursue in the next 1-3 years:

- Create a flexible commuter benefits program requiring employers who provide free/subsidized parking to offer that value in cash or alternative transportation benefits.
- Create new priced on-street parking permit and meter districts and reduce the time and complexity involved in approving new districts.
- Develop and implement a fee on privately-owned, off-street parking lots.
- Accelerate implementation of the 2018 Performance-Based Parking Management policy.
- Develop and implement a fee on urban delivery, including on-demand parcel and food delivery services, to reduce negative mobility, climate and safety impacts.
- Modify the existing fee structure on private for-hire transportation to reduce negative mobility, climate and safety impacts.
- Advocate for amending the Oregon state constitutional restriction that limits use of funds generated through taxes on motor vehicles.
- Advocate for equitable mobility principles and design in the state toll program.

Longer-term pricing recommendations

Strategies the City should continue exploring, but may take longer to implement:

Truly dynamic demand-based parking pricing

A locally controlled road usage charge

A Central City cordon

Complementary strategies

Policy areas that are most vital to invest in in parallel with pricing:

- **Public transit** infrastructure, operations and service.
- **Bike and pedestrian** infrastructure and programs.
- **Traffic safety** improvements.
- **Incentives and financial support** for different travel options.
- **Strategies to encourage shifting** to electric/more fuel-efficient cars, freight and buses.
- **Affordable housing** connected to multi-modal transportation options.
- **Land use policy** that leads to more connected, complete and inclusive neighborhoods.

Implementation next steps

Policy areas that are most vital to invest in parallel with pricing:

- **Take a leadership role** in advancing transformative pricing policies.
- **Invest in regular data collection** and surveying to inform equity analyses.
- **Study near and longer-term mobility impacts** of the COVID-19 pandemic.
- **Conduct wider community engagement** to inform further pricing policy development.
- **Partner with community members, businesses and organizations** to build coalitions to champion transformative solutions.
- **Explore models for a unified financial assistance system** for households living on low incomes.

DEFINING EQUITABLE MOBILITY

Over its first few meetings, the Task Force developed a working draft Equitable Mobility Framework to guide conversation and analysis, explore tradeoffs, and inform decision making. The Equitable Mobility Framework was inspired by and adapted from the Greenlining Institute's Mobility Equity Framework: **www.greenlining.org/publications/2018/mobility-equity-framework.**

The Equitable Mobility Framework includes five categories that represent what community members care about in the mobility system, as well as 17 indicators to help to evaluate the impacts and opportunities of different policy ideas.

WHO ARE WE PRIORITIZING?

This framework prioritizes extending benefits, reducing disparities and improving safety for Black people, Indigenous people and People of Color (BIPOC communities). Leading with race, the Framework will also be used to consider impacts on people with disabilities, Portlanders with low incomes, multi-lingual individuals and displaced communities.

Why center race?

Because racism is a contributing factor to disparities in equitable mobility: unequal access to mobility options, sustainability and health outcomes, experiences of safety in public space and economic opportunity. Addressing racism itself must be part of the work of creating a more equitable transportation system.

WORKING DRAFT EQUITABLE MOBILITY FRAMEWORK

WE CARE ABOUT

Moving People & Goods

Indicators: EFFICIENCY, TRANSPORTATION AFFORDABILITY, CONNECTIVITY, AVAILABILITY, RELIABILITY, ACCESSIBILITY, QUALITY

Sustainability & Health

Indicators: CLIMATE IMPACT, AIR QUALITY, HEALTH IMPACT

Safety

Indicators: TRAFFIC SAFETY, PERSONAL SAFETY

Economic Opportunity

Indicators: JOB CREATION, WORKING CONDITIONS, CONNECTED THRIVING LOCAL ECONOMY

Equitable Transportation Planning Process

Indicators: INCLUSIVE ENGAGEMENT AND OUTREACH, ACCOUNTABILITY AND EVALUATION

WHAT'S NEXT?

After two years of analysis and Task Force conversation, the POEM project suggests that pricing is a promising and currently under-utilized tool that could help make our transportation system more efficient, address the inequities we see today and help reduce carbon emissions.

The POEM project was the start of a conversation. Before implementation of these recommendations, more public engagement and community input will be critical to further shape and design pricing options that truly advance equitable mobility.

FOR MORE INFORMATION and to sign up for updates about the POEM Project, visit **www.portland.gov/transportation/planning/pricing-options-equitable-mobilitypoem**

Bureau of Planning and Sustainability
Innovation. Collaboration. Practical Solutions.

PBOT PORTLAND BUREAU OF TRANSPORTATION

Executive summary

Metro Regional Congestion Pricing Study

July 2021

EXECUTIVE SUMMARY

What is this study?

The Metro Regional Congestion Pricing Study explored whether congestion pricing can benefit the Portland metropolitan region. Congestion pricing was identified as a high priority, high impact strategy in the 2018 Regional Transportation Plan (RTP). A range of scenarios testing different congestion pricing tools helped regional policymakers understand if pricing can help support the region's four transportation priorities set out in the RTP – climate, congestion, equity, and safety, congestion.

What was the project timeline?

This study took place over the course of approximately two years. The study included a review of existing conditions within the region, a definition of what scenarios would be considered, research of best practices and input from equity and congestion pricing experts, scenario analysis using Metro's regional travel demand model, the development of findings and the identification of next steps.

What pricing strategies did Metro explore?

Metro explored if and how four congestion pricing strategies could support the region's priorities . When implemented, each of the pricing strategies could vary by time of day, by area/facility, by types of drivers on the road and by income levels. The four congestion pricing strategies are outlined at right.

VEHICLE MILES TRAVELED FEE
Drivers pay a fee for every mile they travel

CORDON PRICING
Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)

ROADWAY PRICING
Drivers pay a fee to drive on a particular road, bridge or highway

PARKING PRICING
Drivers pay to park in certain areas

Who was involved?

This study was led by Metro staff,[1] working closely with the Transportation Policy Alternatives Committee (TPAC), which was the study's technical advisory committee, the Joint Policy Advisory Committee on Transportation (JPACT), which provided policy direction, and Metro Council, which provided policy direction and overall project guidance. The City of Portland and TriMet were funding partners in the study, and project staff collaborated regularly with the City of Portland and ODOT to leverage and align parallel congestion pricing efforts.

Study methods and findings were reviewed by Metro's Committee on Racial Equity (CORE), the Oregon Department of Transportation's Equity and Mobility Advisory Committee (EMAC), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and an international Expert Review Panel.[2]

How does this relate to Metro's partners' work?

Metro, ODOT, and the City of Portland are all working on projects that consider ways to price transportation to address challenges related to equity, climate change, congestion, and safety. Each agency makes decisions for different parts of our region's transportation system. Each has separate projects underway to help address issues specific to those geographies. The three agencies are coordinating their efforts to leverage each other's work, learn from one another and share findings. The findings and analysis in this report provide a foundational understanding of how congestion pricing could perform in the Portland region and also provides important best practices for designing a pricing program that apply throughout the region and state.

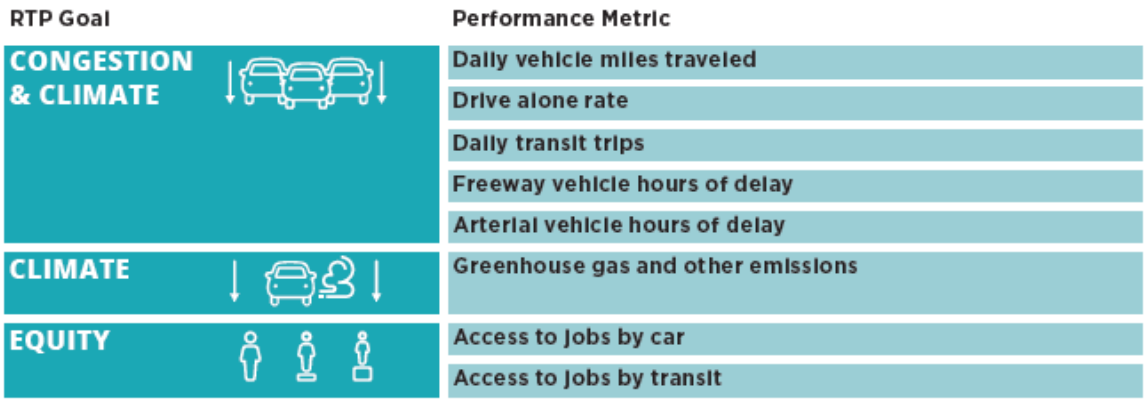
What are the takeaways from the Congestion Pricing Study?

Congestion pricing has the potential to help the greater Portland region meet the priorities outlined in the 2018 Regional Transportation Plan, including reducing congestion and improving mobility, reducing greenhouse gas emissions, and improving equity and safety outcomes. However, it depends how pricing is implemented in the region.

Metro used its travel demand model to conduct in-depth modeling and analysis to help regional policymakers understand the potential performance of different types of pricing tools (VMT, cordon, parking, and roadway). Each scenario was analyzed for how well it performed relative to the four regional priorities using performance metrics produced by the model.

[1] Metro hired a consultant team to support technical analysis and process for this work. The consultant team was led by Nelson\Nygaard and included Sam Schwartz Engineering, HNTB, Silicon Transportation Consultants, TransForm, Mariposa Planning Solutions and PKS International.

[2] Details on Expert Review Panel can be found here: https://www.oregonmetro.gov/sites/default/files/2021/04/07/congestion-pricing-expert-panel-flyer-20210407.pdf



Key findings from each scenario are described below.

VMT

Scenarios tested

Two scenarios were modeled with a per mileage fee, which was applied to all drivers for every mile driven on every street in the Metropolitan Planning Area. VMT B added a charge of $0.0685/mile, and VMT C added $0.132/mile.

Scenario results

VMT scenarios performed well on all metrics at a regional scale, largely because all driving trips would be charged. Total travel cost would be the highest among the pricing tools studied, but those costs would be the most widely distributed compared to other pricing options.

Equity spotlight

Some Equity Focus Areas experienced a combination of higher costs without significant improvement in jobs access. Mobility improved in much of the region and jobs access improved. There were also reductions in harmful emissions.

Future considerations

A VMT pricing program should consider whether drivers who would pay more have viable alternatives to driving, and could focus on investments (transit, pedestrian, or bicycling infrastructure) or provide discounts or caps on charges for groups that would be disproportionately impacted, either because of where they live or their ability to pay.

Cordon

Scenarios tested

A fee was applied to drivers entering into a specific area. Cordon A encompassed downtown Portland, South Waterfront, and parts of Northwest Portland. Cordon B included the entirety of Cordon A, as well as the Central Eastside Industrial District and the Lloyd District. Drivers who traveled through the cordon area, but remained on the freeways or highways, were not assessed a charge. The cordon charge was $5.63.

Scenario results

The cordons studied resulted in relatively high mode shift to transit, indicating that adding a charge for drivers in areas with good transit infrastructure could successfully shift travel modes. However, the diversion onto the nearby uncharged facilities that increased vehicle delay and decreased job access by auto would need to be explored in greater depth.

Equity spotlight

Areas inside the cordon boundary experienced lower costs and higher jobs access because of the decreasing traffic within the cordon as drivers avoided through trips and diverted to throughways and arterials adjacent to the corridor. This would be a direct benefit to communities of color and low-income households that live within the cordon boundaries (the area within the cordon is considered an Equity Focus Area). However, for those same populations outside of the cordon area, delay increased and job access for drivers decreased. Additionally, those who drove into the cordon paid higher costs, even if they would benefit from improved travel times within the cordon. Costs were low at a regional scale, but high for the individuals who entered the cordon.

Future considerations

Cordon design considerations could include expanding the cordon area to encompass more origins and destinations, pairing cordon pricing with roadway pricing on key facilities near the cordon, providing a time-of-day charge, or providing discounts or exemptions for groups that would be disproportionately impacted. Improvements to arterials near the cordon to speed transit (such as bus only lanes) could also be considered.

Parking

Scenarios tested

Increased parking charges were applied to all areas within the Metropolitan Planning Areas (MPA) boundaries that were assessed a parking charge in the 2018 RTP's 2040 Financially Constrained Scenario for both Parking A and Parking B scenarios. Parking A scenario marginally added the same parking costs; the Parking B scenario doubled the parking costs.

Scenario results

Overall, parking charging demonstrated positive results for all metrics at a regional level. The analysis shows that charging for parking could increase transit ridership – likely a direct result of charges generally being assessed in areas with good transit service and high employment. Charges were concentrated among fewer travelers compared to the VMT scenarios. While the total travel cost was low compared to other pricing scenarios, the cost to the individual drivers who parked was relatively high.

Equity spotlight

The parking scenarios showed very little change in jobs accessibility and costs throughout the region. The areas affected by parking charges have good transit service, so parking charges could be more easily avoided. Equity focus areas showed a smaller percent increase in jobs accessible by auto than non-equity focus areas.

Future considerations

The impacts to vulnerable populations should be carefully considered in a parking program, which could focus on discounts or caps on charges for key groups or revenue reinvestment to improve transit service.

Roadway

Scenarios tested

Roadway charges were applied to drivers on highways limited access highways within the MPA boundaries. Roadway A included a charge of $0.132/mile, while Roadway B included a charge of $0.264/mile.

Scenario results

The two Roadway scenarios had mixed results at a regional level, with a reduction in VMT and reduced delay on the charged roadways coupled with increased delay to nearby non-charged roadways. Burdens and benefits were not uniformly distributed and could disproportionately impact travelers that live on the outskirts of the region.

Equity spotlight

Areas further from tolled throughways tend to experience worse access to jobs by auto, which include some EFA areas. With fewer options of using the faster tolled roadways and competing with traffic on arterials that diverted from those tolled roadways, commuters here experienced somewhat slower travel by autos and transit.

Future considerations

A roadway pricing program should focus on the impacts to delay on the throughways charged as well as the impacts to nearby non-charged roadways. Impacts at a localized scale would need to be examined to understand if there were investments (such as transit, bike, or pedestrian improvements) that could improve overall performance. In addition, the travel costs should be assessed at a granular scale to understand the impact on vulnerable groups.

The analysis showed:

All four types of congestion pricing could help address congestion and climate priorities.

- All eight scenarios reduce the drive alone rate, vehicle miles traveled, and greenhouse gas emissions.
- All scenarios increase daily transit trips. (Roadway A has a minimal increase.).
- In fact, the projected improvements were comparable to modeled scenarios with much higher investment in new transportation projects.

Geographic distribution of benefits, impacts, and costs varied by scenario.

- Traffic diversion, travel time savings, and costs to travelers varied by location and by congestion pricing tool.
- Without changes, some scenarios would have disproportionate impacts on equity communities and key geographies.
- Geographic distributions of benefits and costs can inform where to focus investments and affordability strategies.
- In-depth analysis will be necessary to understand benefits (who and where) and costs (who and where) of any future projects.

There are tradeoffs for implementing pricing scenarios.

- Our current transportation funding system will not achieve Metro's climate and equity goals. The tax structure is regressive and focuses on auto infrastructure that reinforces inequity and results in high emissions.
- Overall regional transportation costs and individual traveler costs vary by scenario
- All eight scenarios increase the overall cost for travel for the region, but some scenarios spread the costs widely while others concentrate them on fewer travelers. Those that spread the costs also have the highest overall cost for travel in the region and the highest revenue potential
- Higher overall transportation costs equal higher revenue which can allow investment in improvements to address safety and equity concerns.

A summary of findings is described on the next page.

Table ES-1 Regional Congestion Pricing Study High-Level Findings

RTP Goal	Metrics	VMT B	VMT C	COR A	COR B	PARK A	PARK B	RD A	RD B
Congestion & Climate	Daily VMT								
	Drive Alone Rate								
	Daily Transit Trips								
	2HR Freeway VHD								
	2HR Arterial VHD								
Climate	Emissions								
Equity	Job Access (Auto)								
	Job Access (Transit)								
Total Regional Travel Cost		**Med-High**	**High**	**Med-Low**	**Med-Low**	**Low**	**Low**	**Med**	**Med**

Note: Dark blue indicates better alignment with regional goals when compared to the Base scenario

Legend	Daily VMT	Drive Alone Rate	Job Access (Auto)	Job Access (Transit	Daily Transit Trips	2HR Freeway VHD	2HR Arterial VHD	Emissions
Large Positive Change	-5% or more	-5% or more	10% or more	5% or more	10% or more	-10% or more	-10% or more	-5% or more
Moderate Positive Change	-2% to -5%	-2% to -5%	5% to 10%	2% to 5%	5% to 10%	-5% to -10%	-5% to -10%	-2% to -5%
Small Positive Change	-0.5% to -2%	-0.5% to -2%	1% to 5%	0.5% to 2%	1% to 5%	-1% to -5%	-1% to -5%	-0.5% to -2%
Minimal Change	0.5% to -0.5%	0.5% to -0.5%	1% to -1%	0.5% to -0.5%	1% to -1%	1% to -1%	1% to -1%	0.5% to -0.5%
Small Negative Change	0.5% to 2%	0.5% to 2%	-1% to -5%	-0.5% to -2%	-1% to -5%	1% to 5%	1% to 5%	0.5% to 2%
Moderate Negative Change	2% to 5%	2% to 5%	-5% to -10%	-2% to -5%	-5% to -10%	5% to 10%	5% to 10%	2% to 5%
Large Negative Change	5% or more	5% or more	-10% or more	-5% or more	-10% or more	10% or more	10% or more	5% or more

Note: "Positive" and "Negative" refer to progress toward regional goals, and not to numerical values (i.e., a reduction in VMT is "positive")

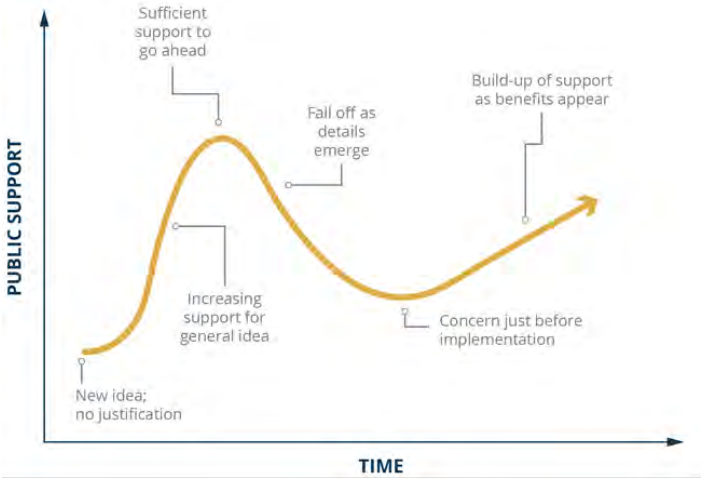
The results provided here ONLY show the effects of charging drivers under different scenarios; implementation of mitigations, discounts, or other changes to policies could result in changes to the performance of a scenario.

What are the implementation considerations?

There are many factors for the Portland metro region and its partners to consider as the region continues to explore the feasibility of implementing congestion pricing:

- Public acceptance: all pricing programs are likely to struggle with public acceptance. There is a common perception that pricing is likely to hurt transportation disadvantaged populations and that people will pay more for something without seeing a benefit. Case studies have shown acceptance grows after a pricing program is implemented, as shown in the figure below. A concerted public engagement and marketing effort would likely be needed to garner acceptance of a congestion pricing project or program.

Figure ES-1 Public Acceptance of Congestion Pricing Changes Over Time



- Parking pricing is the easiest of the tools to implement since it leverages existing infrastructure and processes to introduce congestion pricing.
- Cordon pricing can leverage state of the art tolling and enforcement technologies, making implementation moderately difficult to implement.
- Although roadway pricing can leverage many tolling methods, enforcement can be difficult. Also, tolling roadways that are not limited access could be cost prohibitive, reflecting why arterial tolling is not typically priced considered.
- A VMT program could build off of the OReGO pilot but a major implementation barrier is enforcement and mandating vehicles to participate.
- A pilot phase might make sense for the Portland region to trial one or more technologies before scaling up to a region-wide system.

How can Congestion Pricing address Equity?

Many people worry that congestion pricing will hurt those least able to pay. However, our current system is inequitable. Not only are transportation funding sources regressive, but spending is also focused on automobile infrastructure over other transportation modes, as shown in Figure ES-2 below. Gas tax rates are a fixed amount per gallon regardless of a driver's ability to pay, and motor vehicle fees in Oregon are not correlated to a motorist's income nor the value of the vehicle.

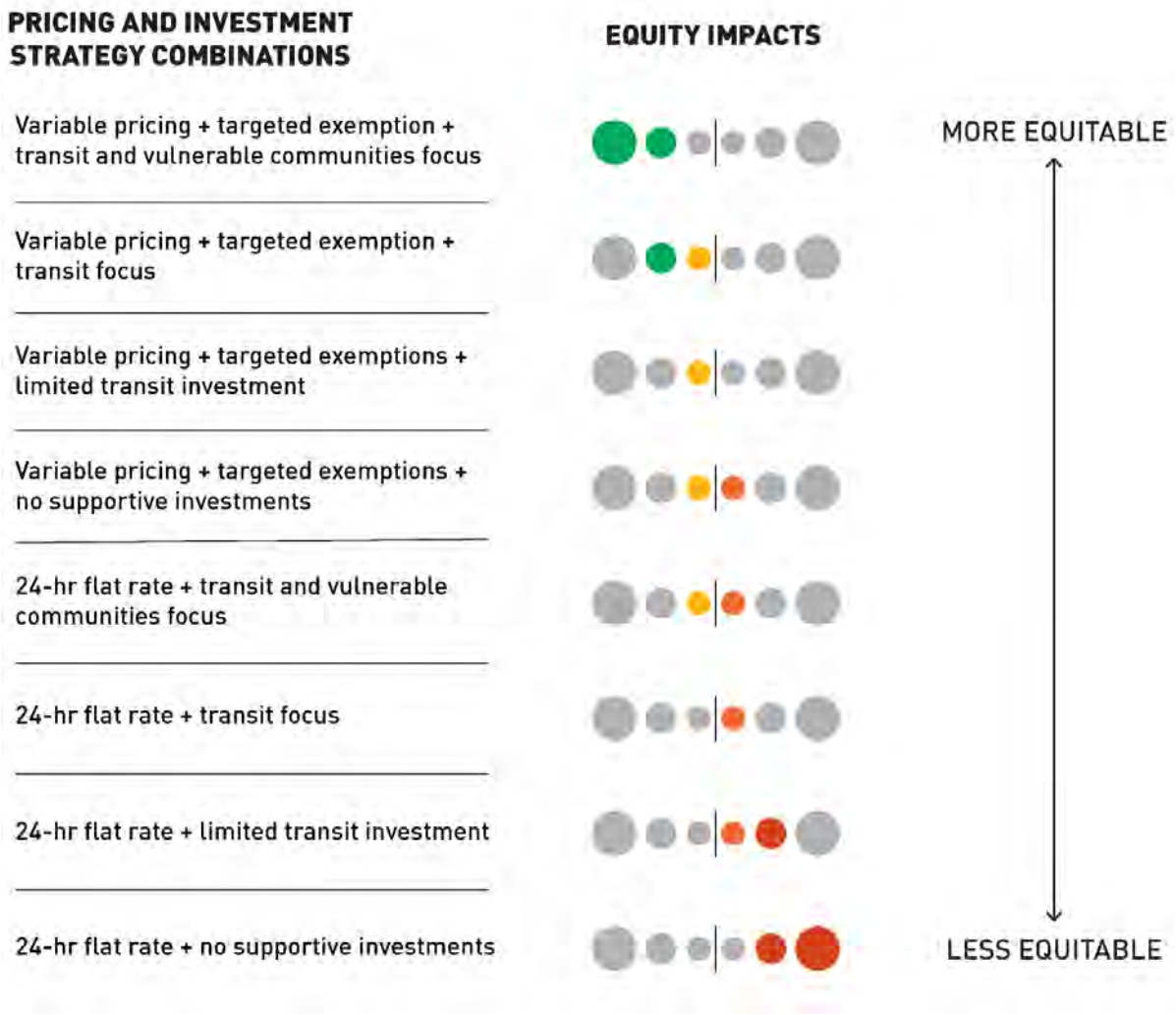
Figure ES-2 Inequities within Today's System

This focus favors those with more means and encourages driving. It reinforces inequity with spending focused on auto infrastructure. In addition, health impacts from high automobile reliance disproportionately harm Black, Indigenous, and People of Color (BIPOC) and low-income communities. Low-income people spend a much higher percentage of their income on transportation than high income earners. As it functions today, the current funding and spending structure will not help the region meet its urgent equity and climate goals.

Congestion pricing strategies have the potential to improve racial equity and benefit marginalized communities as well as all residents of the region. Congestion pricing tools have the potential to be more flexible than current funding in how funds are collected and what funds are spent on.

The biggest determinant of whether a congestion pricing program improves equity is how the program is designed-- how people are charged and how revenue from congestion pricing strategies is spent. A pricing program with the same charge can *improve* or *harm* equity depending on how it deals with affordability, the places it improves, and the type and locations of investments. An example of how this can be is shown as Figure ES-3 below.

Figure ES-3 Program Design Impact on Equity Outcomes



Building an Equitable Pricing Program

If carefully structured, congestion pricing can create a more fair and just transportation system, not just compared to the predominant revenue raising strategies used to pay for transportation today, but more directly to improve affordability, access, safety, and health of historically and currently excluded, impacted, and underserved communities. Congestion pricing programs and projects can improve equity outcomes by:

- Reducing harm and increasing benefits if agencies are willing to focus engagement on historically impacted residents and other stakeholders traditionally at a disadvantage and ensure they have a role in decision making at every step in the process.
- Revenue can be focused on equity outcomes. Revenues from congestion pricing can be invested in key neighborhoods or roadways, focused on transit, sidewalks, and bike lanes, or invested in senior and disabled services. Pricing benefits can be targeted to key locations where mobility improvements or air quality can be meaningfully improved.
- Affordability can be built into a program. Congestion pricing is more flexible than current funding sources. Exploring who pays and to what degree, and considering a

suite of affordability programs such as rebates or exemptions for low-income drivers, a "transportation wallet", or other investments that address affordability.

Figure ES-4 An Equity Framework for Road Pricing

Source: TransForm 2017

As part of the Congestion Pricing Study, Metro reached out to three groups with expertise in equity: Metro's CORE, the City of Portland's POEM Task Force, and ODOT's EMAC to discuss and receive feedback on the RCPS methods for assessing equity benefits and impacts.

These groups confirmed that there are concerns around congestion pricing disproportionately impacting those least able to pay. They agreed that any pricing program must have meaningful

engagement with community and equity groups early. Combining their feedback with equity experts in the field helped clarify the importance of engagement and the importance of a project conducting in depth technical analysis (including mapping) to help determine who benefits and who is impacted by a program.

Key findings from an equity perspective

While the Equity Focus Areas see an increase in percent change of jobs accessible by auto in six of the eight scenarios, they benefit less than non-equity focus areas across the board. Related to access to community places, each pricing scenario results in increased access for equity focus areas and non-equity focus areas. Equity focus areas benefit more than non-equity focus areas for accessibility by auto for the cordon scenarios and the roadway scenarios. When it comes to change in access to community places by transit, the benefit to non-equity focus areas exceeds the benefit to equity focus areas for all scenarios.

Key findings from an equity perspective:

- Go beyond a toolkit
- Connect analysis to further study
- Design scenarios to address barriers
- Inform expenditure framework
- Develop supportive programs
- Establish pre- and post-deployment monitoring

What are the recommendations?

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

- Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region's land use and transportation system.
- Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.
- Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.
- Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
    - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety) and

    - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).

- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specifically For Policy Makers

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

Specifically For Future Project Owners/Operators

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

What are the next steps?

Since its identification as a high priority, high impact strategy in the 2018 RTP, Metro staff and leaders endeavor to better understand how our region could use congestion pricing to manage traffic demand to meet climate goals without adversely impacting safety or equity. This study delineates the impacts pricing could have in helping the region:

- Reduce traffic congestion;
- Improve equity by reducing disparity;
- Enhance safety by getting to Vision Zero; and
- Support the climate by reducing greenhouse gas emissions.

The study's Expert Review Panel demonstrated that congestion pricing is effective in encouraging drivers to change their behavior (using more sustainable travel modes like transit, walking, or biking; driving less; and driving at different times) and reducing congestion and greenhouse gas emissions.

Leaders around the region and state should use the findings from this study to inform policies, including the development of the 2023 RTP and other transportation projects that may include congestion pricing in the future. We expect this study will inform the work of implementing agencies as they propose new congestion pricing projects at the local level.

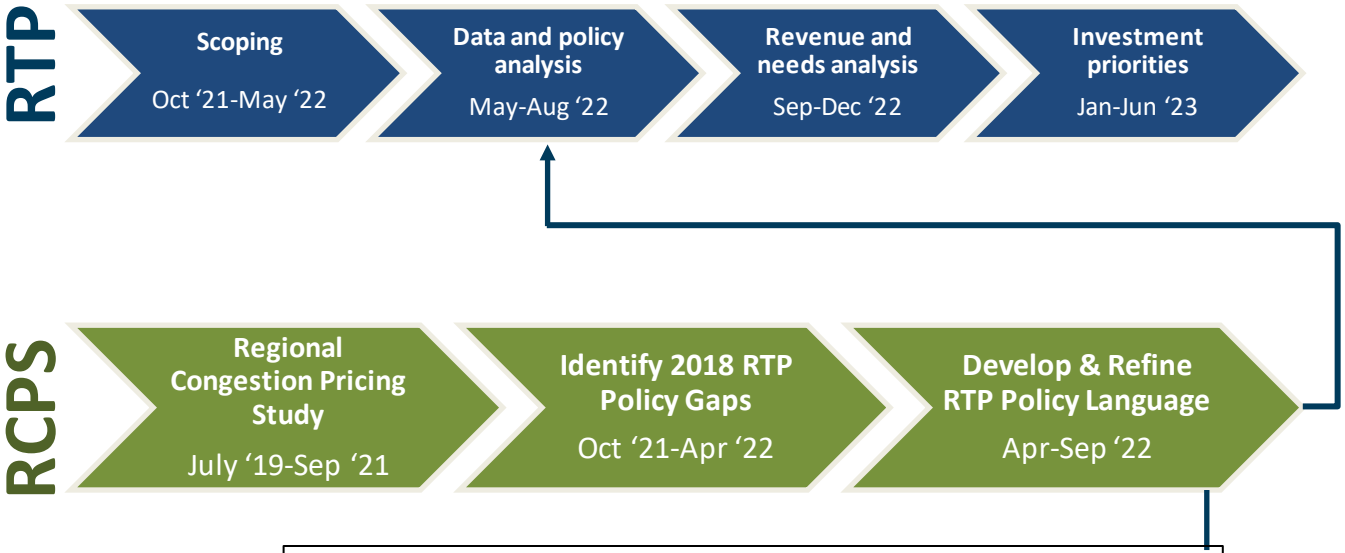
Materials following this page were distributed at the meeting.

RTP Pricing Policy Development

Metro Council

September 13, 2022

2023 RTP Update Schedule



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

JPACT/Metro Council Workshop – July 28

Thank you for your input!

Workshop Themes

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

Revised Draft RTP Pricing Policies

Policy 1 **Mobility**: Improve reliability and efficiency of the transportation network, reduce VMT per capita, and increase transportation options through congestion management, investments in transit, bike, and pedestrian improvements, and transportation demand management programs.

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

Policy 3 **Safety**: Address traffic safety and the safety of users of all modes, both on the priced system and in areas affected by diversion.

Policy 4 **Diversion**: Minimize diversion impacts created by pricing programs and projects prior to implementation and throughout the life of the pricing program or project.

Policy 5 **Climate**: Reduce greenhouse gas emissions and vehicle miles travelled per capita while increasing access to low-carbon travel options.

Policy 6 **Technology and User Experience:** Coordinate technologies and pricing programs and projects to make pricing a low-barrier, seamless experience for everyone who uses the transportation system and to reduce administrative burdens.

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Continuing Work on RTP Policies

- Policy background/context and connection to the RCPS and the action items
- Clarification on how policies and actions relate to RTP goals and objectives
- How different pricing projects can be regionally coordinated.
- Continue coordination with OHP amendment

Next Steps – RTP Update

- 9/15 – JPACT
- 9/21 – MTAC
- 9/28 – MPAC
- 10/28 – Written feedback from TPAC
- November-December – Staff updates policies and incorporate in RTP chapter updates
- Late winter / early spring – Chapter updates brought to TPAC/JPACT/Council

Learn more about the Regional Transportation Plan at:

oregonmetro.gov/rtp

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