

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, February 2, 2024
Time: 9:00 a.m. to 12:00 p.m.
Place: Virtual meeting held via Zoom *video recording is available online within a week of meeting*
[Connect with Zoom](#)
Passcode: 765069
Phone: 877-853-5257 (Toll Free)

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| 9:00 a.m. | Call meeting to order, declaration of quorum and introductions | Vice Chair Leybold |
| 9:10 a.m. | Comments from the Chair and Committee Members <ul style="list-style-type: none">• Updates from committee members around the Region (all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe)• Reminder to review draft UPWP prior to March 1 TPAC discussion (John Mermin) | |
| 9:25 a.m. | Public communications on agenda items | |
| 9:28 a.m. | Consideration of TPAC minutes, Jan. 5, 2024 (<u>action item</u>) Send edits/corrections to Marie Miller | Vice Chair Leybold |
| 9:30 a.m. | Metro Transportation Improvement Program (MTIP) Formal Amendment Resolution 24-XXXX <u>Recommendation to JPACT (action item)</u> Purpose: For the purpose of adding or amending seven projects in the 2024-27 MTIP to meet Federal transportation project delivery requirements. | Ken Lobeck, Metro |
| 9:40 a.m. | Overview of Emergency Transportation Routes Phase 2 project Purpose: Provide an overview of RETR Ph.2 and ask for help recruiting potential candidates to serve on quarterly work group | John Mermin, Metro |
| 10:00 a.m. | 2027-30 Metropolitan Transportation Improvement Program (MTIP) Revenue Forecast Purpose: To provide TPAC and interested parties an overview of the revenue forecast of federal and state funds projected for the Portland metropolitan region. | Grace Cho, Metro |
| 10:25 a.m. | <i>5-minute meeting break</i> | |
| 11:00 a.m. | 2027-30 Metropolitan Transportation Improvement Program and 28-30 Regional Flexible Fund Allocation Program Directions (information and input) Purpose: To provide TPAC and interested parties an overview of the schedule and process for developing the Metropolitan Transportation Improvement Program (MTIP) and the Regional Flexible Fund Allocation (RFFA) program directions. | Ted Leybold, Metro Grace Cho, Metro |
| 11:45 a.m. | Adjournment | Vice Chair Leybold |

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានពាក្យបណ្តឹងរើសអើងសម្រាប់សេវាសាធារណៈរបស់យើង។
www.oregonmetro.gov/civilrights
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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2024 TPAC Work Program

As of 1/23/2024

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

All meetings are scheduled from 9am - noon

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| <p><u>TPAC meeting, February 2, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Committee member updates around the Region (Vice Chair Leybold & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe)• Reminder to review draft UPWP prior to March 1 TPAC discussion (John Mermin) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min)• Overview of Emergency Transportation Routes Phase 2 project (John Mermin; 20 min)• 2027-30 MTIP Revenue Forecast (Grace Cho; 25 min)• 2027-30 Metropolitan Transportation Improvement Program and 28-30 Regional Flexible Fund Allocation Program Directions (information and input) (Ted Leybold/Grace Cho, Metro; 45 min) | <p><u>TPAC workshop meeting, February 14, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none">• ODOT Update on Funding Allocations for 2028-30 (Great Streets 2.0, ADA, ARTS, etc.) (Ford/Bolen, 30 min)• 2028-30 Regional Flexible Funds – Overview of previously funded projects (TBD; 55 min)• Project Delivery Workshop – Kick off and Introduction (Lobeck/Leybold, 70 min) |
| <p><u>TPAC meeting, March 1, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min)• Westside Multimodal Improvements Study (WMIS) (Kate Hawkins, Metro, 45 min)• 2024-25 Unified Planning Work Program (UPWP) (John Mermin, Metro, 30 min) | |
| <p><u>TPAC meeting, April 5, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• 2027-30 STIP update (Neelam Dorman)• Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min)• 2024-25 Unified Planning Work Program (UPWP) <u>Recommendation to JPACT</u> (Mermin, 20 min) | <p><u>TPAC workshop meeting, April 10, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none">• Project Tracker – Introduction to the new Regional Database (informational) (Ted Leybold/Jodie Kotrlík, 45 min)• Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min)• TriMet and SMART – Budget Updates and Programming of Projects (TriMet and SMART Staff, 40 min)• ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min) |

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| <p><u>TPAC meeting, May 3, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • 28-30 Regional Flexible Fund Program Direction 25-XXXX <u>Recommendation to JPACT</u> (Cho/Leybold, 45 min) • 27-30 MTIP Program Direction 25-XXXX <u>Recommendation to JPACT</u> (Cho/Leybold, 45 min) • Kick-off to the Transportation Demand Management and Regional Travel Options Strategy Update (Caleb Winter, Marne Duke, Noel Mickelberry, Grace Stainback, 45 min) | |
| <p><u>TPAC meeting, June 7, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • 2027-30 STIP update (Neelam Dorman) • Fatal crashes update (Lake McTighe) • 28-30 RFFA – Step 2 - Updates <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Safe Streets for All Update (McTighe, 30 min) • Freight Study update (Tim Collins, 30 min) | <p><u>TPAC workshop meeting June 12, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min) • 28-30 RFFA – Technical Evaluation Criteria – Discussion of Refinements and Inputs (Cho/Leybold, 60 min) • ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min) |
| <p><u>TPAC meeting, July 12, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Forward Together 2.0 Vision (Kate Lyman, TriMet; 45 min) • Connecting First and Last Mile Study Introduction (Ally Holmqvist, Metro; 45 min) | |

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| <p><u>TPAC meeting, August 2, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 28-30 RFFA – Step 2 - Updates <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) | <p><u>TPAC workshop meeting August 14, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series (Leybold/Lobeck, 60 min) • 28-30 RFFA Proposers Workshop (Cho/Leybold/Lobeck, 120 min) |
| <p><u>TPAC meeting, September 6, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 28-30 RFFA Step 2 – Call for Projects <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) | |
| <p><u>TPAC meeting, October 4, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Safe Streets for All Update (McTighe, 30 min) | <p><u>TPAC workshop meeting October 9, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min) • ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min) |
| <p><u>TPAC meeting, November 1, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Forward Together 2.0 Implementation (Kate Lyman, TriMet; 45 min) | <p><u>TPAC meeting, December 6, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Connecting First and Last Mile” Study (Ally Holmqvist, Metro; 45 min) |

Parking Lot: Future Topics/Periodic Updates

- Columbia Connects Project
- 82nd Avenue Transit Project update (Elizabeth Mros-O'Hara & TBD, City of Portland)
- Best Practices and Data to Support Natural Resources Protection
- TV Highway Corridor plan updates
- High Speed Rails updates (Ally Holmqvist)
- MTIP Formal Amendment I-5 Rose Quarter discussion (Ken Lobeck)
- I-5 Rose Quarter Project Briefing (Megan Channell, ODOT)
- I-5 Interstate Bridge Replacement program update
- Ride Connection Program Report (Julie Wilcke)
- Get There Oregon Program Update (Marne Duke)
- RTO Updates

Agenda and schedule information E-mail: marie.miller@oregonmetro.gov or call 503-797-1766.

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



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: January 24, 2024
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments during early to mid-January 2024

BACKGROUND

Formal Amendments Approval Process:

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

Administrative Modifications Approval Process:

Projects requiring only small administrative changes as approved by FHWA and FTA are completed via Administrative Modification bundles. Metro normally accomplishes one "Admin Mod" bundle per month. The approval process is far less complicated for Admin Mods. The list of allowable administrative changes is already approved by FHWA/FTA and are cited in the Approved Amendment Matrix. As long as the administrative changes fall within the approved categories and parameters, Metro has approval authority to make the change and provide the updated project in the MTIP immediately. Approval for inclusion into the STIP requires approval from the ODOT. Final approval into the STIP usually takes between 2-3 weeks to occur depending on the number of submitted admin mods in the approval queue.

**MTIP Formal Amendments
January FFY 2024 Amendment
Amendment Number: JA24-04-JAN**

| January FFY 2024 Formal Transition Amendment Bundle Contents | | | | |
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| Amendment Type: Formal/Full | | | | |
| Amendment #: JA24-04-JAN | | | | |
| Total Number of Projects: 8 7 | | | | |
| Key Number/ MTIP ID | Lead Agency | Project Name | Project Description | Amendment Action |
| Category: Project Cancellations: | | | | |
| (#1) ODOT Key # 23462 MTIP ID 71394 | Beaverton School District | Beaverton School District EV Chargers | Purchase and install electric wall mount chargers. | <u>CANCEL PROJECT:</u> The formal MTIP amendment cancels Key 23462 from the 2024-27 MTIP. DEQ has determined the project will not proceed forward and has requested ODOT to cancel the project. |
| Category: 82nd Ave Bus Rapid Transit (BRT) Project Development Related | | | | |
| (#2) ODOT Key # NEW - TBD MTIP ID TBD | Metro | 82nd Ave Bus Rapid Transit Project Development: Sunnyside-PDX | Complete project development activities in support of the planned new 82nd Ave BRT including preliminary design, addressing NEPA requirements, development of FTA rating materials and other activities needed to assist TriMet obtain a Small Starts grant. | <u>ADD NEW PROJECT:</u> The formal amendment adds the new project tot eh 2024-27 MTIP which will support the completion of various project development activities as TriMet moves forward to secure a Small Starts grant for the project as well. |
| (#3) ODOT Key # 23239 MTIP ID 71331 | Metro | Carbon Reduction Program Reserve | Funding to focus on transportation activities which reduce the emissions of carbon and greenhouse gases from transportation sources. | <u>SPLIT PROJECT:</u> The formal amendment splits \$6 million of CRP funds (plus match) and transfers them to the new Metro 82 nd Ave BRT project. |

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| <p>(#4) ODOT Key # 23229 MTIP ID 71304</p> | <p>Metro</p> | <p>CANCELED ACTION Transit Corridor Development (FFY 2026)</p> | <p>Metro UPWP RFFA Step 1 funds to study and evaluate the development of future transit transportation corridors in the Metro region</p> | <p>SPLIT PROJECT Split \$1 million of STBG- U (and match) and transfer it to the new Metro BRT Project Development study. January 18,2024 Update: Due to a potential eligibility conflict with another Metro Carbon funded project, the STBG that was to be applied to the 82nd Ave BRT Project Development project will now be swapped with Carbon funds and applied to the other project. The swap will occur administratively as a separate action. As a result, the planned commitment of STBG to the 82nd Ave BRT Project Development project will not occur. No amendment action within the January 2024 Formal MTIP Amendment bundle is required. Key 23229 is dropped and removed from the formal amendment.</p> |
| <p>Remaining Standard Project Amendments (e.g. cost increases, scope, limit changes, etc.)</p> | | | | |
| <p>(#4) ODOT Key # 22435 MTIP ID 71257</p> | <p>ODOT</p> | <p>OR47/OR8/US30 Curb Ramps</p> | <p>Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR47, OR8, and US30 to reduce mobility barriers and make state highways more accessible to disabled persons</p> | <p>COST INCREASE: Add a small Utility Relocation (UR) phase and increase construction to address the revised construction phase estimate</p> |

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| <p>(#5) ODOT Key # 22185 MTIP ID 71214</p> | <p>TriMet</p> | <p>Enhanced Seniors Mobility/Individuals w/Disabilities (2024) 5310</p> | <p>Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area</p> | <p>ADD FUNDS: Update FTA based 5310 formula fund annual estimates and add overmatch to the project in FFY 2024</p> |
| <p>(#6) ODOT Key # 23188 MTIP ID 71317</p> | <p>TriMet</p> | <p>Enhanced Seniors Mobility/ Individuals w/Disabilities (2025)</p> | <p>Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2025</p> | <p>ADD FUNDS: Update FTA based 5310 formula fund annual estimates and add overmatch to the project in FFY 2025</p> |
| <p>(#7) ODOT Key # 20329 MTIP ID 70882</p> | <p>West Linn</p> | <p>OR43: Marylhurst Dr -Hidden Springs Rd (West Linn) OR43: Willamette Dr at Marylhurst Dr (West Linn)</p> | <p>Construct a new cycle track and sidewalk along OR-43 from Cedar Oaks to Hidden Springs Rd. Install a new traffic signal at OR43 and Hidden Springs Rd. Construct a new protected signalized intersection at OR43/Marylhurst that provides separation for vehicles, pedestrians, and</p> | <p>SCOPE CHANGE: The formal amendment revises the project scope to primarily be located at the Marylhurst Dr intersection and will be limited to intersection safety improvements plus upgrades to the traffic signal. Revise project limits and scope based on adjusted cost estimates. Change project name and description as a result.</p> |

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| | | | bicyclists and improves safety for all roadway users. | |
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Proposed Amendment Review and Approval Steps:

- January 5, 2024 - TPAC meeting: Approval recommendation provided to JPACT.
- January 18, 2024- JPACT meeting: Resolution 24-5380 approved.
- Friday, February 2, 2024: Scheduled end of 30-day Public Comment period.
- Thursday, February 8, 2024: Scheduled Metro Council approval action requested.
- Early March 2024: Estimated final USDOT amendment approvals occur.

Administrative Modifications

No Admin Mods submitted during January 2024 as of January 24, 2024.

An administrative modification consisting of several projects that require minor funding and technical updates will proceed in late January. The admin mod will be reported in next month's monthly amendment report.

Meeting minutes



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

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

Date/time: Friday January 5, 2024 | 9:00 a.m. to 12:00 p.m.

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

Members Attending

Tom Kloster, Chair
Karen Buehrig
Allison Boyd
Dyami Valentine
Judith Perez Keniston
Eric Hesse
Jaimie Lorenzini
Jay Higgins
Mike McCarthy
Tara O'Brien
Chris Ford
Gerik Kransky
Laurie Lebowsky-Young
Lewis Lem
Bill Beamer
Danielle Maillard
Indi Namkoong
Ashley Bryers
Katherine Kelly
Shauna Hanisch-Kirkbride

Affiliate

Metro
Clackamas County
Multnomah County
Washington County
SW Washington Regional Transportation Council
City of Portland
City of Happy Valley and Cities of Clackamas County
City of Gresham and Cities of Multnomah County
City of Tualatin and Cities of Washington County
TriMet
Oregon Department of Transportation
Oregon Department of Environmental Quality
Washington State Department of Transportation
Port of Portland
Community member at large
Oregon Walks
Verde
Federal Highway Administration
City of Vancouver
Washington Department of Ecology

Alternates Attending

Adam Fiss
Will Farley
Neelam Dorman
Glen Bolen

Affiliate

SW Washington Regional Transportation Council
City of Lake Oswego and Cities of Clackamas County
Oregon Department of Transportation
Oregon Department of Transportation

Members Excused

Sarah Iannarone
Jasia Mosley
Steve Gallup
Shawn M. Donaghy
Danielle Casey

Affiliate

The Street Trust
Community member at large
Clark County
C-Tran System
Federal Transit Administration

Guests Attending

Anthony DeSimone
Bryan Graveline
Casey Gillespie

Affiliate

Clackamas County
Portland Bureau of Transportation
Oregon Department of Transportation

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|---------------------|------------------------------------|
| Cody Field | City of Tualatin |
| Eve Nilenders | Multnomah County |
| Gordon Okumu | The Street Trust |
| Jean Senechal Biggs | City of Beaverton |
| Jennifer John | Parametrix |
| Jonathan Maus | BikePortland |
| Kate Lyman | TriMet |
| Mara Krinke | Parametrix |
| Mat Dolata | City of Hillsboro |
| Max Nonnamaker | Multnomah County Health Department |

Metro Staff Attending

Ally Holmqvist, Bill Stein, Caleb Winter, Cindy Pederson, Eliot Rose, Grace Cho, Jake Lovell, Jess Zdeb, John Mermin, Ken Lobeck, Lake McTighe, Marie Miller, Marne Duke, Matt Bihn, Matthew Hampton, Noel Mickelberry, Ted Leybold, Tim Collins, Tom Kloster.

Call to Order, Declaration of a Quorum and Introductions

Chair Kloster called the meeting to order at 9:00 a.m. Introductions were made. A quorum of members present was declared. Reminders where Zoom features were found online was reviewed.

Comments from the Chair and Committee Members

- Laurie Lebowsky-Young announced a job opening with the Washington State Department of Transportation SW region for a transportation planner to do development review, commenting on current planning development applications from local jurisdictions for compliance with state transportation policies and guidelines. They would also review proposed comprehensive plan amendments from local jurisdictions. They would review for the CIPA State Environmental Policy Act, checklists on local land development applications in the state of Washington. They are looking for someone familiar with the Washington State Growth Management Act. This position is open until Jan. 19. The link was shared in chat:
<https://www.governmentjobs.com/careers/washington/wsdot/jobs/4327578/development-review-planner-tps3>

A recent article from the New York Times as shared about the rise of pedestrian deaths, especially at night. Their podcast featured this issue in east Portland recently.
<https://www.nytimes.com/interactive/2023/12/11/upshot/nighttime-deaths.html>

- Karen Buehrig announced that their Clackamas County Principal Planner moved onto a different position. So there is an opening which is very exciting because we'll be updating our transportation system plan, as well as have many different activities going on within the county. It was noted that Clackamas County is both urban and rural which offers opportunity for planning in unique was. We are extending the close date for the Clackamas County Principal Planner - Transportation until February 7th. The job posting link was shared in chat:
https://hrapp.clackamas.us/psc/recruit/EMPLOYEE/HRMS/c/HRS_HRAM_FL.HRS_CG_SEARCH_FL.GBL?Page=HRS_APP_SCHJOB_FL&Action=U
- Lake McTighe announced Metro has hired a Safe Streets for All assistant GIS position that's for our safety program and for implementation of our Safe Streets for All grant. It was announced Metro is also hiring for an associate safety planner position, as a limited duration. This is also to help implement

our Safe Streets for All grant. The position posting closes on Jan. 16. We're quickly assembling our safety program team with a lot of excitement for the next couple years as we get to focus much more deeply on safety, especially engagement with our partners across the region who are doing really good work on the ground. The link to the position was shared:

<https://www.governmentjobs.com/careers/oregonmetro/jobs/4319936/associate-transportation-planner-limited-duration>

- Neelam Dorman announced ODOT has a senior transportation planner position in Region 1. A couple of responsibilities for this position would be working with local agencies as many of you are updating your transportation system plans, staffing, county coordinating meetings, and administrating the transportation growth and management grant program. A link was shared in chat: ODOT Senior Transportation Planner:

https://oregon.wd5.myworkdayjobs.com/SOR_External_Career_Site/job/Portland--ODOT--Region-1-Headquarters/Senior-Transportation-Planner_REQ-145635

The Oregon Bicycle & Pedestrian Advisory Committee is looking for an at-lkarge member. This is an eight member Governor appointed statewide committee advising ODOT on statewide bicycle & pedestrian issues. The link in chat provides background on what the committee does and has a section of recruiting application deadlines: <https://www.oregon.gov/ODOT/Get-Involved/Pages/OBPAC.aspx>

- **2027-30 STIP update** (Neelam Dorman) I don't have a lot more to share since the November OTC meeting. A brief recap was given from the TPAC November meeting on funding allocations by program categories. The ARTS application process is moving far ahead of the STIP schedule. That submission deadline was Dec. 15. We are moving ahead with that grant program.

We aren't anticipating starting scoping until summer of this year, and that's much later than it typically is for STIP cycles. This is a reflection on the limited scoping that's being anticipated. There's time needed to develop and roll out new scoping software and processes.

A couple of changes we're doing is with a few nomenclature changes. Previously we used the percent terminology. We're simplifying that. Now the terminology will be essentially a proposed project list, and then a funded project list. We don't know anything about what the regional allocations will be of those funded categories. There's the big umber that goes into different things. We don't know how much of that will come to the region. We won't know that until May.

We also don't have a specific guidance on how STIP projects will be evaluated and selected. This includes how the leverage approach will work for Great Streets 2.0, how they'll take into account safety, climate, and equity considerations. Those are all being worked on and will be reported on moving forward. We likely won't have really integral information to share until after the May meeting so at the June TPAC meeting is where we can share more details.

Eric Hesse noted the ODOT TSP guidelines process is wrapping up. It was important to underscore some the messages heard, that I think as what comes out, and as OTC continues to do important work on the TSP updates, the analysis procedures manual will be important as we go through our own TSPs right now, as Metro staff reaches out to update timelines and sync up the process as we look ahead to the Regional Transportation Functional Plan. I wanted to encourage Metro to start integrating that into our workflows as much as we can so we're all on the same page.

- **Monthly MTIP Amendments Update** (Ken Lobeck) Reference to the memo in the packet was made on the monthly submitted MTIP formal amendments submitted during December 2023. Questions on the memo can be directed to Mr. Lobeck.
- **Fatal crashes update** (Lake McTighe) The monthly fatal traffic crash report for Clackamas, Multnomah and Washington Counties was given. It was noted this was preliminary data shared by ODOT and news reports, recognizing a lot of people have died on our streets, with a lot of older adults killed while walking. With moving into the Safe Streets for All programs progress may be soon seen. We'll also be talking about starting to showcase work that folks are doing within the jurisdictions so that we're tracking the numbers and tracking progress for making an impact.

Shauna Hanisch-Kirkbride asked is there a way to include Clark County fatalities too. Ms. McTighe noted she has started to include those that come through PIO police media announcements and working on getting the data to help make that happen.

- **Cascadia Ultra-High-Speed Rail FRA Grant Award Update** (Ally Holmqvist) It was mentioned last month that we would hear an announcement on Federal Railroad Administration awards before the end of the year. Cascadia HSR and the companion application for Amtrak Cascades improvements both were accepted into the Corridor Identification and Development program and will receive \$500K for planning. Cascadia HSR did not receive the Federal State Partnership funding award (\$198M). No projects in the planning phase did.

However, this is a big milestone for HSR because Corridor ID is a pipeline with multiple phases with future awards. We still anticipate being able to implement the scope we planned (and are now beginning work with FRA to flesh out). It's just that we won't have all the funding in hand right now. We're planning to return to TPAC with details late spring or summer following some initial scoping conversations with FRA.

- **Environmental Protection Agency Grants updates** (Eliot Rose, Metro) Building onto previous presentations on the EPA Climate Pollution Reduction Grants, which are grants for public agencies to apply for projects that reduce greenhouse gas emissions over the next five years, I wanted to make the committee aware that EPA has announced a similar and parallel funding stream called the Community change grants. Like the Climate Pollution Reduction grants these are focused on near-term greenhouse gas reductions. The main difference is that they can be led by community-based organizations or coalitions of community-based organizations and public agencies.

This has stirred interest among many non-profits, community-based organizations in the region who are also seeing opportunities to reduce climate emissions and help meet the region's climate goals. There may be some community ideas looking for public agency feedback and support. The structure of this is a little bit different than the CPRG program. Applications are on a rolling timeline. The overall amounts are different, and the term of the grant is different. It's three years for the community change as opposed to five years for the CPRG program.

As we've been engaging through CPRG, we've had conversations about how this work can benefit equity, often seen as a lot to do on top of other requirements that are for the CPRG

grants. It's great these other resources are available to go directly to community groups for climate related ideas, including some of the many climate justice and climate equity ideas that we've been discussing through the CPRG program. A link was shared in chat for more information: EPA community change grants: <https://www.epa.gov/inflation-reduction-act/inflation-reduction-act-community-change-grants-program>

- **TPAC Survey Results & Discussion** (Chair Kloster) The results of the TPAC survey were reviewed. The first question was about having occasional in-person meeting at the Metro Regional Center. We had more or less a yes response on that with a quarterly frequency per year. A briefing with Catherine Ciarlo, Metro Planning & Development Director, will be held to discuss further and be reported back to the committee.

The second question was whether there was interest in Diversity, Equity & Inclusion (DEI) training which the committee has done in the past. This was a mixed result in the survey. Some noted they had this already through their employers. Some asked if it could be worked into TPAC regular meetings. A meeting with the new DEI program manager for department is planned before reporting back to the committee with further details.

The third question was about a TPAC book club which drew many curious responses. They ranged from no, not a reader, no but like the idea, other found it interesting, others asking were they pushing the agenda. It was suggested it could be an opt-in participation. Chair Kloster, VC Leybold and TPAC member Jaimie Lorenzini will meet to discuss further.

Public Communications on Agenda Items – none received

Consideration of TPAC Minutes from December 1, 2023

Minutes from TPAC December 1, 2023 were approved unanimously with one abstention: Shauna Hanisch-Kirkbride.

Metro Transportation Improvement Program (MTIP) Formal Amendment Resolution 24-5380

Recommendation to JPACT (action item) (Ken Lobeck) The January 2024 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle adds or amends a total of eight projects. A summary of project changes:

Key 23462. Beaverton School District EV Chargers project cancelation:

Upon additional review of the project DEQ with the Beaverton School District, the Oregon Department of Environmental Quality (DEQ) has determined the Congestion Mitigation Air Quality (CMAQ) funded improvement project will not move forward and has requested ODOT cancel the project from the MTIP and STIP.

Key – NEW. Metro 82nd Ave Bus Rapid Transit (BRT) Project Development planning project:

Action: The formal amendment adds the new project development project to the MTIP and STIP. The project contains Metro approved Carbon Reduction Program (CRP) federal funds (\$5 million), and \$1 million of federal Surface Transportation Block Grant (STBG-U) funds along with the required 10.27% minimum local match.

Key 23239, Metro Carbon Reduction Program Reserve and Key 23229, Metro Transit Corridor Development split projects:

Action: Split Projects.

Carbon (\$5 million federal) and STBG funds (\$1 million federal) are split off the two PGBs and transferred to support the new 82nd Ave BRT Project Development planning project. The required 10.27% minimum local match is included.

Key 22435. ODOT - OR47/OR8/US30 Curb Ramps:

Action: Cost Increase.

The project will construct curb ramps to ADA standards to various site locations at OR47 and US30. Most of the project is located outside of the Metropolitan Planning Boundary.

Key 22185 and 23188. TriMet - Enhanced Seniors Mobility/ Individuals w/Disabilities (2024 and 2025 appropriations):

Action: Add Funds

Both projects belong to TriMet. They involve providing para-transit services to senior and to disable persons. The funding program is referred to as Section 5310.

Key 20329. West Linn - OR43: Willamette Dr at Marylhurst Drive (West Linn):

Action: Scope Change

The formal amendment revises the project scope to primarily be located at the Marylhurst Drive intersection and be limited to intersection safety improvements and an upgrades traffic signal.

Comments from the committee:

Gerik Kransky pointed out that the canceled DEQ funded project operating with the CMAC funds will actually be continuing that project through a different revenue source. The Beaverton School District was unable to meet ODOT's project delivery requirements as part of it being funded through our CMAC partnership. And so DEQ was able to find some state revenue to keep that project whole. We will still be installing some bus electrification charging infrastructure with the Beaverton School District, just not through CMAC.

Karen Buehrig asked about the funding going to the 82nd Avenue Bus Rapid Transit (BRT) project. It seemed there are two funding sources. Is that why there are two different numbers associated with it? And do the different numbers then fund different part of the project? Mr. Lobeck noted there's a TriMet project coming which also will have federal funds on it, but that is a separate thing coming in February. But the Metro piece is that to complete various project development activities which will go all the way through NEPA completion. Under the roadway improvement project specification estimates final design it includes a total of six million of approved federal funds. Five million were approved out of the Carbon Reduction. Metro allocated 18 million from the Carbon Reduction Program and another million are being pulled to support the project from a transit quarter development, which is a project group bucket with prior approved Unified Planning Work Program (UPWP) funds supporting corridor development.

Clarifying these are prior approved already under the RFFA Step one, Ted Leybold noted that if you remember we got the one million increase in funding from the bipartisan infrastructure law passing when we were doing the RFFA process last cycle. In the middle of that we got the big bump in revenue from the new authorization bill. At that time we set aside \$2.5 million into this bucket that's described for BRT development project in the three corridors of 82nd Avenue, TV Highway and McLoughlin. That's the source. That was approved through that RFFA process. That's the source of the bucket being described. So it's a combination of the carbon reduction fund allocation that was also approved prior, and that last RFFA when we got the bump in revenue from the last

authorization bill and for that carbon reduction program project.

MOTION: To provide JPACT an approval recommendation of Resolution 24-5380 to add and amend the eight projects to the 2024-27 MTIP.

Moved: Eric Hesse

Seconded: Tara O'Brien

ACTION: Motion passed unanimously with one abstention; Shauna Hanisch-Kirkbride.

TriMet Forward Together 2.0 (Kate Lyman, TriMet) The presentation began noting that Forward Together 1.0 was the financially constrained plan for service growth. This Forward Together 2.0 builds on this, intentionally meant to be broader to support the goal for ridership that is called TriMet's Vision 2030. The plan will identify how to meet targets for ridership in the Regional Transportation Plan and be used as a tool to seek additional operating revenue.

The goals for transit ridership in the Regional Transportation Plan 2023 update and TriMet Vision 2030 were reviewed. Ways to improve ridership addressed in this plan include improving the frequency of service on buses and MAX, expanding the hours of service, and adding new services where they don't currently exist. Engagement with regional committees, jurisdictional staff, and the public was shown with a timeline. A list of regional transportation plans was noted that have been reviewed, with TriMet asking what other specific plans or needs for transit service should we consider with this, and how use of 12.2% regionwide transit mode share goal for this project can be accomplished.

Comments from the committee:

Karen Buehrig appreciated the work being done on the plan. I think with the Forward Together framework or even Forward Together 2.0, being able to discuss how different types of transit or transportation services are appropriate in different locations could be helpful in the conversation around providing a transit service. I say that more specifically because I know a lot of the times in the suburban areas we talk a lot about the need for shuttle service. But where does that really fall within the rubric of transit service or transportation service? I know that Metro will be starting a project about last mile service and addressing that last mile piece. So being able to understand how these two projects connect together will be really helpful in future conversations.

It's also important that the work done in Clackamas County on our transit development plan in 2020, adopted in 2021, will connect with Forward Together now. Transit services and needs have changed. So it's likely that our transit development plan doesn't capture all the needs in the area. Being able to understand these facts are just the starting point because now transit lines are expected to go in different locations at different service levels.

I don't recall seeing it in your list of plans, but in Clackamas County the importance of our connection to our rural transit providers is very strong, so they are able to connect to the TriMet service. As this is an important element of connecting our neighbors with our service providers, having it highlighted in Forward Together 2.0 in some way, either from transit centers, mobility hubs, or park & rides getting to the goals. I look forward to participating in the work. Ms. Lyman appreciated the comment about coordinating with Metro's last mile planning effort. Ally Holmqvist noted that Ms. Lyman and I were able to meet late last year and coordinate on aligning schedules for Forward Together 2.0, Connecting First/Last Mile and 2028 RTP scoping. We'd planned to follow up again around now once I reinitiated scoping.

Jaimie Lorenzini noted that Happy Valley is starting to be incredibly built out, especially on our west side of town. It's worth noting that most of Happy Valley is outside of TriMet's lift area. That makes it difficult to capture train ridership because for people to access the services they have to use the trail system. And the further out we get, the more of a disincentive to get people onto Sunnyside Road. I would be curious to see a map of the region and look at where TriMet is planning to deploy its assets, looking at places that will be functional transit deserts, even in that scenario, and starting to look at how, if money were not issue, how we could start planning for services in those areas to start qualifying people for lift services, even if it's a local shuttle service that can connect places like Metro's affordable housing development to other essential destinations, the places that maybe aren't quite as dense, but that shuttle could be used as a proof of concept for more robust transit going forward.

TriMet had in the past a good pedestrian access plan, identifying places where there are gaps to getting to stations. I'm curious how this is factored into this, which is more of a capital one-time investment, but it seems like it could help improve ridership. Ms. Lyman noted we would see an update of the pedestrian plan as a follow up action to Forward Together 2.0. Once we have identified the scale of service growth and the locations of service growth we can start to plan for an order to provide service in some of these key corridors we're going to need to look at for sidewalks and connectivity, and find more space at certain transit centers or maybe new transit centers. I think the capital planning follows from the service planning.

Jay Higgins asked is this LIFT like the ADA transit? Does that factor into TriMet service goals? Ms. Lorenzini answered yes - LIFT is TriMet's shared-ride service for people who are unable to use regular buses and trains due to a disability or disabling health condition.

<https://trimet.org/lift/about.htm>

Eric Hesse noted the City of Portland is excited about this work. I think it's really important since we acknowledge that we have a TSP goal for nearly twice the mode share that the region does. We acknowledge a very strong service to date and appreciate that at the regional table. The balancing act between ridership and productivity and coverage is appreciated for all these needs.

I echo Karen and Jaimie's points around these efforts which may be more focused on the ridership generation, even as we need to do in combination with the first and last mile, and maybe with the Regional Transportation Functional Plan update. I will note that around how we have transit, supportive land use and infrastructure, in order to help growing transit communities, readiness for more intensive services will be an important exercise to do some scenario work to understand that as we're refreshing that rule set, that we support the body of work that helps us all contribute the way we need to really appreciate how the different responsibilities are laid out, and how they package fits together to generate that.

I think from the City's perspective focusing on where we really can get those ridership gains, particularly given the last few years of trajectory, where we are really seeing impacts across the entire transportation system with ridership down. That's a major issue for the region to grapple with even as we focus on how we make sure that the newly developing areas are getting the services they need.

It was noted that some interaction with the tolling and pricing scenario development and understanding how that relates toward ridership generation. I think the City is also grappling with

the ways in which the regional travel demand model is both helpful and at times has limitations, particularly around mode shift. I would caution as more information comes from these processes it could potentially undervalue how much mode shift might occur when significant pricing inputs are inserted into the system. As we are working with the legislature and other important stakeholders hopefully position our information well.

Ms. Lyman noted the primary planning horizon for the way we've thought about Forward Together 2.0 is 2045. The tolling that's in the RTP for 2045 network will be our primary assumptions for this plan as well. That said, we have sort of a secondary time zone that we're looking at of 2030 in order to inform our executive directors about what might be possible to meet our own goal. We know that the Interstate Bridge Replacement won't be completed by 2030. So for the sort of secondary 2030 analysis we're just assuming the regional mobility pricing program tolling is in place and not the Interstate Bridge tolling.

Mr. Hesse noted I think I further understand there may be some scenarios with and without tolling in general, so we can do a little sensitivity test⁵ around sort of how it plays out. Is that correct? Ms. Lyman noted she thought the scenarios are going to sort of a near-term scenario which means anything that we think would be in place by 2030, which is not Interstate Bridge, not Southwest Corridor, but includes the BRT projects. And it includes the regional mobility pricing program and then the longer term look that has all those MAX projects completed as well as the tolling on the I-5 Bridge.

Mr. Hesse appreciated the information and the point of syncing with the RTP. It was acknowledged other work between ODOT and Metro in terms of the Westside Multimodal Study, also raising the potential of tolling to help manage the system on the westside. I think as we are out of an RTP cycle and have the opportunity to use the model in different ways I would encourage us to continue to think even beyond what the RTP says as we look at the scenarios of how we get there.

Mike McCarthy noted that as we're talking about how to increase mode share and try to get from that 5.4% to the 12.2% one of the most opportune times in a person's life to get them to make a behavior change, say the travel mode, is when other big changes are happening in their life. Such as buying a house. We have thousands of new house going up in the expansion areas of Washington County and all around the region, and they're getting built at densities that would support transit pretty well. But right now there is no transit service in those areas. If we want people to use transit, how do we get service to areas when these houses are developed, when these people are moving in, when they are in that phase of life, when we have the best opportunity to make a behavior change in their travel mode. It's something I hope gets addressed in the plan. Because I think it's a really important factor for all of the County and region in how we actually get service to the areas that really don't have service now or transit options.

Jay Higgins was curious about if TriMet sees this plan addressing any of the kinds of issues raised by Eric and Mike. Because there is one thing about putting much of the service out there and accepting that. Such as we just need to wait for people to realize that it's a really good idea to transit. But then, there's all this tolling out of your control. So how much is the plan looking at those things, such as what else can be done around the margins to change behaviors and make it that there's that realization period I didn't even know transit was in my area. There's programmatic ideas. Is that part of the plan? Ms. Lyman agreed that those things are important. I don't know that we have a way to really analyze the effect of those kinds of programs. So no, because we're really trying to focus this

plan on what TriMet's role is, what TriMet's responsibilities are. We do marketing for our services, but I'm not sure we have data on the return of those. Like how many riders do we get per marketing campaign. I don't know. That's not really the focus of this plan because it's not an input to a model or something we feel there's anyway for us to analyze.

Eric Hesse noted there may be opportunities to layer in elasticity-based information re: some of the programmatic efforts Jay referenced in addition to the modeled results.

https://www.caleemod.com/documents/handbook/full_handbook.pdf

Dyami Valentine gave appreciation on the work and collaboration that was held with the work that was done in Washington County around our transit vision, which we are wrapping up shortly. We appreciate the work to hold off on initiating this effort until we were wrapped up because what we've done is essentially establish what we think is going to provide a network thinking longer term to really serve our community members.

One thing that we've really identified is the need to focus on that user experience, improving travel time and reliability and safe access as being key to really encouraging ridership. I think you touched on the effort. To Jay's point, one thing I think is interesting, I was hopping on a MAX a couple days ago and a rider asked the driver what's the wifi password. I found that an encouraging factor for some users if there was wifi available on our MAX system.

One thing I didn't see listed in the reviewed plans was Washington County's transit development plan, which does focus on the regional connections, the rural connections. One question I have thinking about the TRP implications, the new TRP requirements, and the land use implications around transit priority corridors and having assurance around services, and what parking requirements there are and other land use applications that are dependent on transit service being available. I think that might be a helpful exercise to consider as we're moving through this process for the local jurisdictions to have a better understanding because we have the land use authority, so we are really reliant on what that plan is or will be. So making sure that we're having those conversations and really grappling with that through this process will be helpful.

Adjournment

There being no further business, meeting was adjourned by Chair Kloster at 10:35 a.m.

Respectfully submitted,

Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC meeting, January 5, 2024

| Item | DOCUMENT TYPE | DOCUMENT DATE | DOCUMENT DESCRIPTION | DOCUMENT No. |
|------|---------------------------------|---------------|---|--------------|
| 1 | Agenda | 1/5/2024 | 1/5/2024 TPAC Agenda | 010524T-01 |
| 2 | 2024 TPAC Work Program | 12/29/2023 | 2024 TPAC Work Program as of 12/29/2023 | 010524T-02 |
| 3 | Memo | 12/28/2023 | TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments during December 2023 | 010524T-03 |
| 4 | Draft Minutes | 12/1/2023 | Draft minutes from TPAC 12/1/2023 | 010524T-04 |
| 5 | Resolution 24-5380 | N/A | Resolution 24-5380 FOR THE PURPOSE OF ADDING OR AMENDING EIGHT PROJECTS TO THE MTIP TO MEET FEDERAL DELIVERY REQUIREMENTS | 010524T-05 |
| 6 | Exhibit A to Resolution 24-5380 | N/A | Exhibit A to Resolution 24-5380 | 010524T-06 |
| 7 | Staff Report Memo | 12/28/2023 | TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: January 2024 MTIP Formal Amendment & Resolution 24-5380 Approval Request | 010524T-07 |
| 8 | TPAC Worksheet | N/A | TPAC Worksheet: Forward Together 2.0: Project Introduction and Overview | 010524T-08 |
| 9 | Slide | 1/5/2024 | December fatal traffic crash report for Clackamas, Multnomah and Washington counties | 010524T-09 |
| 10 | Presentation | 1/5/2024 | January 2024 Formal MTIP Amendment Resolution 24-5380 | 010524T-10 |
| 11 | Presentation | 1/5/2024 | Forward Together 2.0 A Long-Range Plan for TriMet Service | 010524T-11 |

BEFORE THE METRO COUNCIL

| | | |
|--|---|------------------------------------|
| FOR THE PURPOSE OF ADDING OR |) | RESOLUTION NO. 24-53XX |
| AMENDING SEVEN PROJECTS IN THE |) | |
| 2024-27 MTIP TO MEET FEDERAL |) | Introduced by: Chief Operating |
| TRANSPORTATION PROJECT DELIVERY |) | Officer Marissa Madrigal in |
| REQUIREMENTS |) | concurrence with Council President |
| |) | Lynn Peterson |

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

WHEREAS, the U.S. Department of Transportation requires federal funding for transportation projects located in a metropolitan area to be programmed in an MTIP; and

WHEREAS, in July 2023, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved Resolution No. 20-5335 to adopt the 2024-27 MTIP; and

WHEREAS, the 2024-27 MTIP includes Metro approved RTP and federal performance-based programming requirements and demonstrates compliance and further progress towards achieving the RTP and federal performance targets; and

WHEREAS, pursuant to the U.S. Department of Transportation's MTIP amendment submission rules, JPACT and the Metro Council must approve any subsequent amendments to the MTIP to add new projects or substantially modify existing projects; and

WHEREAS, the Design Acceptability Process resulted in revised phase cost estimates for ODOT's US26 at SE 36th Ave Safety upgrade project that will provide increased pedestrian safety needs resulting in adding \$782, 694 of HB2017 funds to the project; and

WHEREAS, ODOT's Public Transit Division is decreasing the authorized funding to their Oregon Transportation Network project that will support various eligible transit operations vehicle procurements which will be programmed separately later; and

WHEREAS, ODOT's Public Transit Division is adding a new ride share type project to the MTIP which totals \$2.2 million dollars that will support gas bus and van replacements, as well as preventative maintenance, mobility management, and will be programmed as separate later authorized projects; and

WHEREAS, TriMet is adding their 82nd Ave Bus Rapid Transit Project Development project that compliments Metro’s project development version to complete NEPA and final design to support their effort to secure a later Federal Transit Administration Capital Improvement Program Small Starts Grant; and

WHEREAS, TriMet is updating their FTA Section 5310 elderly and disabled persons program service estimates and adding local overmatching funds to better reflect their total program funding commitments for federal fiscal year 2026 and 2027; and

WHEREAS, completing the MTIP programming actions will enable subsequent required federal approval steps to occur without delay for the new and amended projects; and

WHEREAS, the programming updates to the seven projects in the February 2024 Formal MTIP Amendment to the 2024-27 MTIP are stated in Exhibit A to this resolution; and

WHEREAS, on February 2, 2024, Metro’s Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on February 15, 2024, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to add or amend the seven projects within Exhibit A to complete the required programming updates to the 2024-27 Metropolitan Transportation Improvement Program.

ADOPTED by the Metro Council this ____ day of _____ 2024.

Approved as to Form:

Lynn Peterson, Council President

Carrie MacLaren, Metro Attorney

February FFY 2024 Formal/Full MTIP Amendment Summary
Formal Amendment #: FB24-05-FEB

The February Federal Fiscal Year 2024 Formal MTIP Amendment adds or amends seven projects for various reasons to meet federal transportation delivery requirements. A summary of the changes includes the following:

- **Key 22551 - US26 - SE Powell Blvd & SE 36th Ave (ODOT)**: The formal amendment completes cost increases to PE, ROW, and Construction phase revised estimates.
- **Key 22322 - Oregon Transportation Network - TriMet FFY23 (ODOT)**: The formal amendment decreases the authorized funding in this project grouping bucket (PGB) per the direction of the Public Transit Division.
- **Key 23541 - Oregon Transportation Network - Ride Connection (ODOT)**: The formal amendment adds the new ODOT Public Transit Division project grouping bucket (PGB) to support regional rideshare activities.
- **Key NEW - TriMet Line 33 Traffic Signal Priority Upgrade (TriMet)**: The formal amendment adds the new traffic signal priority upgrade project with Metro awarded Carbon funds to the MTIP.
- **Key 23580 - 82nd Ave Bus Rapid Transit Project Development: PDX - Sunnyside Ave (TriMet)**: The formal amendment adds the new project development project activity for the 82nd Ave Bus Rapid Transit (BRT) project. Metro also has a partnering project supporting TriMet which is proceeding through the approval process as part of the January 2024 Formal Amendment bundle.
- **Key 23189 - Enhanced Seniors Mobility/Individuals w/Disabilities (2026) (TriMet)**: The formal amendment adjusts the formula FTA Section 5310 funds and adds local overmatch to the project for needs in FFY 2026.
- **Key 23203 - Enhanced Seniors Mobility/Individuals w/Disabilities (2027) (TriMet)**: The formal amendment adjusts the formula FTA Section 5310 funds and adds local overmatch to the project for needs in FFY 2027.

The Exhibit A Tables starting on the next provide a summary of the changes and programming actions for the included projects. See the Exhibit A MTIP Worksheets for the detailed changes and consistency review areas.

2024-2027 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 24-53XX

February FFY 2024 Formal Transition Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: FB24-05-FEB

Total Number of Projects: 7

| Key Number & MTIP ID | Lead Agency | Project Name | Project Description | Amendment Action |
|--|-------------|---|---|--|
| Category: Project Cancelations: No cancelations or removals from the MTIP as part of the February 2024 Formal Amendment | | | | |
| None | | | | |
| Category: Amendments to ODOT Funded and Managed Projects | | | | |
| (#1) ODOT Key # 22551 MTIP ID 71266 | ODOT | US26: SE Powell Blvd & SE 36th Ave | Design and construct a Rectangular Rapid Flashing Beacon (RRFB) traffic signal to increase pedestrian safety. This location was part of the ODOT Inner Powell Road Safety Audit determining location will merit by adding traffic signal at location. | <u>COST INCREASE:</u> The formal amendment adds state HB2017 funds to support PE, ROW, and construction phase cost increases. The cost increase is \$782k to project which is a 104% increase. The increase is above the 50% cost increase threshold for administrative actions. |
| (#2) ODOT Key # 22322 MTIP ID 71228 | ODOT | Oregon Transportation Network - TriMet FFY23 | Urbanized public transit capital funding for Federal fiscal year 2023. Funds will be transferred to FTA for delivery. Projects and programs to be determined based on funding requirements. | <u>FUNDING DECREASE:</u> The eligible State STBG is reduced. The STBG reduction totals \$2,461,508. The ODOT Public Transit Division stated this is required to match FTA allocation/grant amount. The net programming change is 59% which exceeds the 30% cost change administrative threshold for transit projects. The amendment includes the assumption the final awarded funding will be flex transferred to FTA. |

| | | | | |
|---|---------------|---|---|---|
| <p>(#3) ODOT Key # 23541 MTIP ID New – TBD <i>New Project</i></p> | <p>ODOT</p> | <p>Oregon Transportation Network - Ride Connection</p> | <p>Urbanized public transit capital funding project grouping bucket (PGB) to be used for gas bus and van replacement, as well as preventative maintenance and mobility management for federal fiscal year 2023.</p> | <p><u>ADD NEW PROJECT</u> The formal MTIP amendment adds the new ODOT Public Transit Division project grouping bucket (PGB) to support regional rideshare activities. The STBG funds will be transferred to FTA program 5310 for delivery.</p> |
| <p>TriMet Project Amendments</p> | | | | |
| <p>(#4) ODOT Key # New - TBD MTIP ID New – TBD <i>New Project</i></p> | <p>TriMet</p> | <p>TriMet Line 33 Traffic Signal Priority Upgrade</p> | <p>Design and implement the next generation transit signal priority (TSP) upgrade along TriMet's Line 33 to improve reliability of transit service</p> | <p><u>ADD NEW PROJECT:</u> The formal adds the new Transit Signal Priority (TSP) upgrade project awarded with Metro Carbon Reduction Program (CRP) funds. The CRP funds will be flex transferred to FTA.</p> |
| <p>(#5) ODOT Key # 23580 MTIP ID New – TBD <i>New Project</i></p> | <p>TriMet</p> | <p>82nd Ave Bus Rapid Transit Project Development: PDX - Sunnyside Ave</p> | <p>Complete project development activities in support of the planned new 82nd Ave BRT including preliminary design, addressing NEPA requirements, development of FTA rating materials and other activities needed to obtain a Small Starts grant</p> | <p><u>ADD NEW PROJECT</u> The formal amendment adds the new 82nd Ave Bus Rapid Transit (BRT) project for TriMet. The project development activities will complete design and NEPA actions in support TriMet's effort to obtain a FTA Small Starts grant.</p> |
| <p>(#6) ODOT Key # 22189 MTIP ID 71318</p> | <p>TriMet</p> | <p>Enhanced Seniors Mobility/Individuals w/Disabilities (2026)</p> | <p>Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2026</p> | <p><u>ADD FUNDS:</u> Update FTA based 5310 formula fund annual estimates and add overmatch to the project in FFY 2026</p> |

| | | | | |
|--|--------|---|--|--|
| (#7) ODOT Key # 23203 MTIP ID 71319 | TriMet | Enhanced Seniors Mobility/ Individuals w/Disabilities (2027) | Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2027. | <u>ADD FUNDS:</u> Update FTA based 5310 formula fund annual estimates and add overmatch to the project in FFY 2027 |
|--|--------|---|--|--|

Proposed Amendment Review and Approval Steps:

- Wednesday, January 30, 2024: Post amendment & begin 30-day notification/comment period.
- Friday, February 2, 2024: TPAC meeting (Required Metro amendment notification)
- Thursday, February 15, 2024: JPACT meeting.
- Thursday, February 28, 2024: End 30-day Public Comment period.
- Thursday, March 7, 2024: Final approval from Metro Council anticipated.
- Early to mid-April 2024: Estimated final USDOT amendment approvals occur.



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
COST INCREASE
 Add HB2017 State funds to PE,
 ROW, and Construction

Project #1

| Project Details Summary | | | | | | | |
|-------------------------|-------|-------------|-----|--------------------|-------|----------------------------|------------|
| ODOT Key # | 22551 | RFFA ID: | N/A | RTP ID: | 12095 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | 71266 | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | No |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | 24-27-0725 | |

Summary of Amendment Changes Occurring:
 The formal amendment adds state HB2017 funds to support PE, ROW, and construction phases cost increases. The cost increase is \$782k to project which is a 104% increase. The increase is above the 50% cost increase threshold for administrative actions. The cost increase is based on the Design Acceptability Package (DAP) which provides the critical milestone in the decision-making process. It establishes the geometric boundaries of the project footprint, provides the basis for conducting NEPA studies, identifies any right of way that may be needed and provides for a more reliable update to the project scope, schedule, and budget.

| | | | | | | | |
|----------------------------|---|--------------------------------|------|--|-------------------------------|------|--|
| Project Name: | US26: SE Powell Blvd & SE 36th Ave | | | | | | |
| Lead Agency: | ODOT | Applicant: | ODOT | | Administrator: | ODOT | |
| Certified Agency Delivery: | Yes | Non-Certified Agency Delivery: | No | | Delivery as Direct Recipient: | No | |

Short Description:
 Design and construct a Rectangular Rapid Flashing Beacon (RRFP) traffic signal to increase pedestrian safety. This location was part of the ODOT Inner Powell Road Safety Audit determining location will merit by adding traffic signal at location.

MTIP Detailed Description (Internal Metro use only):
 In SE Portland on US26 (SE Powell Blvd) at approximately SE 36th Ave (MP 2.70 to ~~MP 2.70~~) (**MP 2.70 to MP 2.77**), design and construct a Rectangular Rapid Flashing Beacon (RRFP) traffic signal to increase pedestrian safety (Exempt - Table 2, Safety, RTP ID 12095)

STIP Description:
 Design and construct a flashing light traffic signal to increase pedestrian safety. This location was part of the ODOT Inner Powell Road safety audit.

| Project Classification Details | | | |
|--------------------------------|-------------------------|--------------------------------------|---|
| Project Type | Category | Features | System Investment Type |
| Highway | Highway - Motor Vehicle | Lane Modification or Reconfiguration | Systems Management, ITS, and Operations |
| ODOT Work Type: | OP-SSI | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|------------------------|-----------|------|----------|------------------------------|--------------------|-------------------------|---------------------|-------|-------------|
| Federal Funds | | | | | | | | | |
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| Federal Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------------|-----------------|----------|------------------------------|----------------------|--------------------|-----------------------|-------|---------------------|
| HB2017 | S070 | 2022 | | \$ 175,000 | | | | | \$ - |
| HB2017 | S070 | 2022 | | \$ 454,163 | | | | | \$ 454,163 |
| HB2017 | S070 | 2023 | | | \$ 90,000 | | | | \$ - |
| HB2017 | S070 | 2023 | | | \$ 99,629 | | | | \$ 99,629 |
| HB2017 | S070 | 2024 | | | | | \$ 485,000 | | \$ - |
| HB2017 | S070 | 2024 | | | | | \$ 978,902 | | \$ 978,902 |
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ 454,163 | \$ 99,629 | \$ - | \$ 978,902 | \$ - | \$ 1,532,694 |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------------|
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| Local Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------------|----------|-------------------------------------|----------------------|--------------------|-----------------------|-------|-----------------------|
| Existing Programming Totals: | \$ - | \$ 175,000 | \$ 90,000 | \$ - | \$ 485,000 | \$ - | \$ 750,000 |
| Amended Programming Totals | \$ - | \$ 454,163 | \$ 99,629 | \$ - | \$ 978,902 | \$ - | \$ 1,532,694 |
| Total Estimated Project Cost | | | | | | | \$ 1,532,694 |
| Total Cost in Year of Expenditure: | | | | | | | \$ 1,532,694 |
| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ 279,163 | \$ 9,629 | \$ - | \$ 493,902 | \$ - | \$ 782,694 |
| Phase Change Percent: | 0.0% | 159.5% | 10.7% | 0.0% | 101.8% | 0.0% | 104.4% |
| Amended Phase Matching Funds: | \$ - | \$ - | \$ - | \$ - | \$ 978,902 | \$ - | \$ - |
| Amended Phase Matching Percent: | N/A | N/A | N/A | N/A | N/A | N/A | 0.00% |
| Phase Programming Summary Totals | | | | | | | |
| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
| Federal | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| State | \$ - | \$ 454,163 | \$ 99,629 | \$ - | \$ 978,902 | \$ - | \$ 1,532,694 |
| Local | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Total | \$ - | \$ 454,163 | \$ 99,629 | \$ - | \$ 978,902 | \$ - | \$ 1,532,694 |
| Phase Composition Percentages | | | | | | | |
| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| State | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 0.0% | 100.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 0.0% | 100.0% | 100.0% | 0.0% | 100.0% | 0.0% | 100.0% |

| Phase Programming Percentage | | | | | | | |
|------------------------------|----------|------------------------------|--------------------|--------------------|--------------|-------|--------|
| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| State | 0.0% | 29.6% | 6.5% | 0.0% | 63.9% | 0.0% | 100.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 0.0% | 29.6% | 6.5% | 0.0% | 63.9% | 0.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|--|----------|------------|---------------------------------------|----|------|------------------------------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | \$ 454,163 | \$ 99,629 | | | | Aid ID |
| Federal Funds Obligated: | | \$ - | \$ - | | | | S026(169) |
| EA Number: | | PE003389 | R9940000 | | | | FHWA or FTA |
| Initial Obligation Date: | | 3/22/2022 | 8/1/2023 | | | | FHWA |
| EA End Date: | | N/A | N/A | | | | FMIS or TRAMS |
| Known Expenditures: | | N/A | N/A | | | | FMIS |
| | | | | | | Estimated Project Completion Date: | 12/31/2027 |
| Completion Date Notes: | | | | | | | |
| Are federal funds being flex transferred to FTA? | | No | If yes, expected FTA conversion code: | | | N/A | |

| Fiscal Constraint Consistency Review |
|---|
| 1. What is the source of funding? State HB2017 funds. |
| 2. Does the amendment include changes or updates to the project funding? Yes. The amendment adds more HB2017 to cover revised phase cost estimates |
| 3. Was proof-of-funding documentation provided to verify the funding change? Yes, via the STIP Impacts Worksheet. |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? Assumption is approval was within Region 1. |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes. |

| Project Location References | | | | | |
|-----------------------------|--------|--------------------|--------------|--------|-------------------------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | Yes | US26 (Powell Blvd) | 2.70 | 2.77 | 0.07 |
| Cross Streets | | Route or Arterial | Cross Street | | Cross Street |
| | | SE Powell Blvd | SE 36th Ave | | Before and after intersection |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|---|----------------|----------------|------------------------|--------------|---|--------------|
| 1st Year Programmed | 2022 | Years Active | 3 | Project Status | 5 | (RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation | |
| Total Prior Amendments | 2 | Last Amendment | Administrative | Date of Last Amendment | January 2023 | Last MTIP Amend Num | AM23-07-JAN1 |
| Last Amendment Action | Slip Cons phase to FFY 2024 with \$485,000 of State Gen funds. Total Cons phase = \$485,000 | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|--|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Equity Focus Area Notes (US26 South = Yes, North and west of 36th Ave = No, north and east of 36th Ave = Yes) People of Color (POC) = Yes Limited English Proficiency (LEP) = No Limited Income (LI) = Yes |
| | | | | X | | X | |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Safety - Projects that correct, improve, or eliminate a hazardous location or feature. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | ID# 12095 - Safety & Operations Projects: 2023-2030 |
| RTP Project Description: | Projects to improve safety and/or operational efficiencies such as pedestrian crossings, speed feedback signs, transit priority technology at signals on arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, sidewalks, bicycle lanes, and other improvements that do not add motor vehicle capacity. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|--|
| Yes/No | Network | Designation |
| Yes | Motor Vehicle | US26/Powell Blvd is designated as a Major Arterial in the Motor Vehicle Network |
| Yes | Transit | US26/Powell Blvd is designated as a Frequent Bus and Future High Capacity Transit (HCT) in the Transit Network |
| Yes | Freight | US26/Powell Blvd is designated as a Roadway Connector in the Freight Network |
| Yes | Bicycle | US26/Powell Blvd is designated as a Bicycle Parkway Bicycle Network |
| Yes | Pedestrian | US26/Powell Blvd is designated as a Pedestrian Parkway in the Pedestrian Network |

| National Highway System and Functional Classification Designations | | | |
|--|-----|------------------|--|
| System | Y/N | Route | Designation |
| NHS Project | No | US26/Powell Blvd | US26 is designated as a MAP-21 Principal Arterial on the National Highway System (NHS) |
| Functional Classification | No | US26/Powell Blvd | Urban Other Principal Arterial |
| Federal Aid Eligible Facility | No | US26/Powell Blvd | 3 = Other Principal Arterial |

Between the Metro Modeling Networks and the NHS designations, the project is considered a Regional Significant project.

| Additional RTP Consistency Check Areas |
|---|
| 1. Is the project designated as a Transportation Control Measure? No. |
| 2. Is the project identified on the Congestion Management Process (CMP) plan? Yes. |
| 3. Is the project included as part of the approved: UPWP? No |
| 3a. If yes, is an amendment required to the UPWP? No. |
| 3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes. |
| 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable. |
| 4. Applicable RTP Goals: <u>Goal 2 - Safe System:</u> Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035. <u>Goal #3 - Equitable Transportation:</u> Objective 3.2 - Barrier Free Transportation: Eliminate disparities related to access, safety, affordability and health outcomes experienced by people of color and other marginalized communities. |
| 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost. |

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be January 30, 2024 to February 28, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Not expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Not expected.**
7. Added notes:

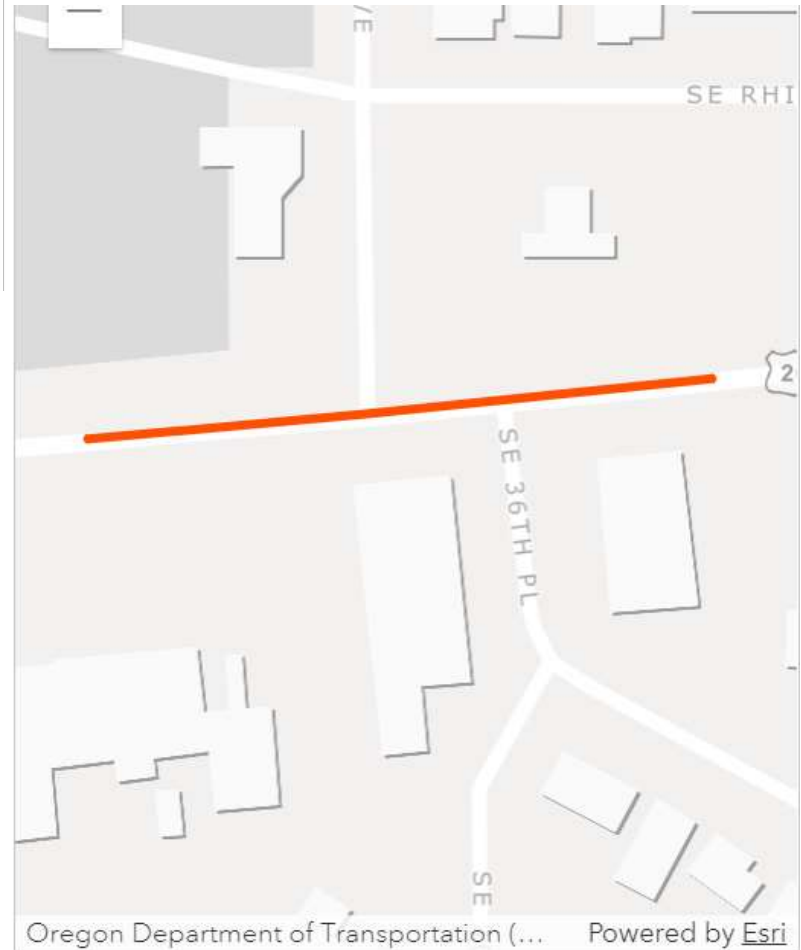
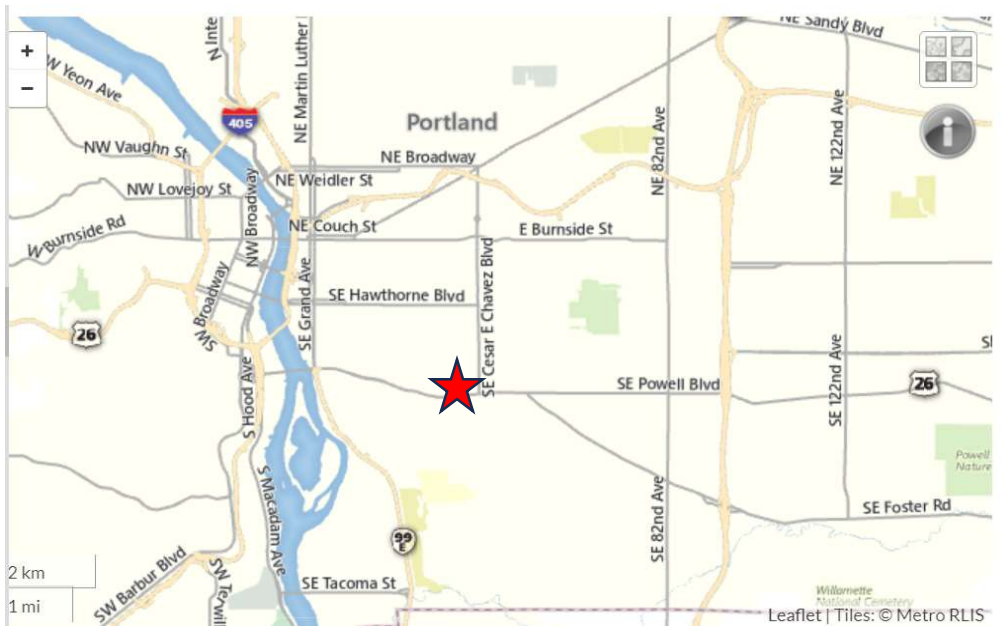
Fund Codes References

| | |
|--------|--|
| HB2017 | State funds allocated to eligible projects from Oregon Legislation under approved HB2017. The passage of HB 2017 (ORS 184.617 to 184.742) transportation funding package occurred five years ago. Within it the Oregon Legislature made a significant investment in transportation across multiple improvement categories. |
|--------|--|

Project Name: US26: SE Powell Blvd & SE 36th Ave

(DRAFT AMENDMENT)

| Fund Codes | | | | | | | | | | |
|---------------------|------------------|------------------------|------------------|---------------------|-----------------|----------------|---------------|---------------------|---------------|--------------|
| Phase | Fund Code | Description | Percent of Phase | Total Amount | Federal Percent | Federal Amount | State Percent | State Amount | Local Percent | Local Amount |
| PE | S070 | HB2017 Funding Package | 100.00% | 454,163.00 | 0.00% | 0.00 | 100.00% | 454,163.00 | 0.00% | 0.00 |
| | PE Totals | | 100.00% | 454,163.00 | | 0.00 | | 454,163.00 | | 0.00 |
| RW | S070 | HB2017 Funding Package | 100.00% | 99,629.00 | 0.00% | 0.00 | 100.00% | 99,629.00 | 0.00% | 0.00 |
| | RW Totals | | 100.00% | 99,629.00 | | 0.00 | | 99,629.00 | | 0.00 |
| CN | S070 | HB2017 Funding Package | 100.00% | 978,902.00 | 0.00% | 0.00 | 100.00% | 978,902.00 | 0.00% | 0.00 |
| | CN Totals | | 100.00% | 978,902.00 | | 0.00 | | 978,902.00 | | 0.00 |
| Grand Totals | | | | 1,532,694.00 | | 0.00 | | 1,532,694.00 | | 0.00 |





Metro
 2024-27 Metropolitan Transportation Improvement Program (MTIP)
 PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
FUNDING DECREASE
 Decrease the authorized STBG for
 the project

Project #2

| Project Details Summary | | | | | | | |
|-------------------------|-------|--------------------|-----|--------------------|-------|---------------------------------------|------------------|
| ODOT Key # | 22322 | RFFA ID: | N/A | RTP ID: | 10928 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | 71228 | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | Yes, 5307 |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | 24-27-0467 | |

Summary of Amendment Changes Occurring:
 The formal MTIP Amendment reduces the eligible State STBG to the project. The STBG reduction totals \$2,461,508. The ODOT Public Transit Division stated this is required to match FTA allocation/grant amount and update the project description. The net programming change is 59% which exceeds the 30% cost change administrative threshold for transit projects. The amendment includes the assumption the final awarded funding will be flex transferred to FTA.

| | | | | | | | |
|----------------------------|---|--------------------------------|------|-------------------------------|-----|--|--|
| Project Name: | Oregon Transportation Network - TriMet FFY23 | | | | | | |
| Lead Agency: | ODOT | Applicant: | ODOT | Administrator: | FTA | | |
| Certified Agency Delivery: | N/A | Non-Certified Agency Delivery: | N/A | Delivery as Direct Recipient: | Yes | | |

Short Description:
 Urbanized public transit capital funding for Federal fiscal year 2023. Funds will be transferred to FTA for delivery. Projects and programs to be determined based on funding requirements.

MTIP Detailed Description (Internal Metro use only):
 ODOT Public Transit Section is applicant and grantor for the funding. State STBG will be flex transferred to FTA for TriMet based on approved projects. TriMet will access the funding through TrAMS once the projects or programs are approved between them and ODOT. Key 22048 represent the second of three years of funding from ODOT supporting the Oregon Transportation Network.

STIP Description:
 Urbanized public transit capital funding for Federal fiscal year 2023. Funds will be transferred to FTA for delivery. Projects and programs to be determined based on funding requirements.

| Project Classification Details | | | |
|--------------------------------|-------------------|----------------------------|------------------------|
| Project Type | Category | Features | System Investment Type |
| Transit | Transit - Capital | Capital Vehicle Operations | Transit |
| ODOT Work Type: | TRANSIT | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|-----------------------|-----------------|-----------------|----------|------------------------------|--------------------|-------------------------|---------------------|-------------------------|-----------------|
| Federal Funds | | | | | | | | | |
| State STBG | Y240 | 2024 | | - | | | | \$ 3,735,416 | \$ - |
| State STBG | Y240 | 2024 | | | | | | \$ 1,526,704 | \$ 1,526,704 |
| Federal Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,526,704 | \$ - |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------|
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|------------------|------------------|-----------------|----------|------------------------------|--------------------|--------------------|--------------|-----------------------|-----------------|
| Local | Match | 2024 | | | | | | \$ 427,535 | \$ - |
| Local | Match | 2024 | | | | | | \$ 174,739 | \$ 174,739 |
| Local Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 174,739 | \$ 174,739 |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------------|----------|------|------|------|------|-------------------------|-------------------------|
| Existing Programming Totals: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 4,162,951 | \$ 4,162,951 |
| Amended Programming Totals | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,701,443 | \$ 1,701,443 |
| Total Estimated Project Cost | | | | | | | \$ 1,701,443 |
| Total Cost in Year of Expenditure: | | | | | | | \$ 1,701,443 |

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|-------------------------------------|------|------|------|----------------|----------------|
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ (2,461,508) | \$ (2,461,508) |
| Phase Change Percent: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | -59.13% | -59.13% |
| Amended Phase Matching Funds: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 174,739 | \$ 174,739 |
| Amended Phase Matching Percent: | N/A | N/A | N/A | N/A | N/A | 10.27% | 10.27% |

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------------|--------------|
| Federal | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,526,704 | \$ 1,526,704 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 174,739 | \$ 174,739 |
| Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,701,443 | \$ 1,701,443 |

Phase Composition Percentages

| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
|-----------|----------|------|------|------|------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 89.73% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.27% | 10.27% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

Phase Programming Percentage

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 89.73% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.27% | 10.27% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|---|----------|------------|-----|---------------------------------------|------|------------------------------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | N/A |
| EA Number: | | | | | | | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | | | | | | FMIS or TRAMS |
| Known Expenditures: | | | | | | | TrAMS |
| Completion Date Notes: | | | | | | Estimated Project Completion Date: | 12/31/2028 |
| Are federal funds being flex transferred to FTA? | | Yes | | If yes, expected FTA conversion code: | | 5307 | |
| Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. | | | | | | | |

| Fiscal Constraint Consistency Review | |
|--|---|
| 1. What is the source of funding? | ODOT Public Transit Division |
| 2. Does the amendment include changes or updates to the project funding? | Yes. ODOT has determined the eligible funding allocation must be decreased. |
| 3. Was proof-of-funding documentation provided to verify the funding change? | Yes, via the STIP Impacts Worksheet indicating the Public Transit |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? | The ODOT Director was required to sign-off and approved the funding commitment |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? | Yes |

| Project Location References | | | | | |
|-----------------------------|-------------------|----------------|----------------|----------------|----------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Cross Streets | Route or Arterial | | Cross Street | Cross Street | |
| | Not Applicable | | Not Applicable | Not Applicable | |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | |
|---|--|----------------|----------------|------------------------|-----------|---|
| 1st Year Programmed | 2024 | Years Active | 0 | Project Status | T22 - New | Programming actions in progress or programmed in current MTIP |
| Total Prior Amendments | 1 | Last Amendment | Administrative | Date of Last Amendment | July 2023 | Last MTIP Amend Num AM23-21-JUL1 |
| Last Amendment Action | Slip Other phase with \$3,735,316 of State STBG plus match from FFY 2023 to FFY 2024 | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|--|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Notes |
| | | | | | X | | The project represent a funding project grouping bucket but is not well enough defined to determine all possible performance measures. |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Mass Transit - Operating assistance to transit agencies. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | 10928 - Operating Capital: Fleet Vehicles: Phase 1 |
| RTP Project Description: | Replacement and refurbishment of zero emission buses, articulated buses, light rail and LIFT vehicles. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|--|
| Yes/No | Network | Designation |
| No | Motor Vehicle | Not Applicable. Project grouping bucket (PGB) with specific projects to be identified later ↓ |
| No | Transit | |
| No | Freight | |
| No | Bicycle | |
| No | Pedestrian | |

| National Highway System and Functional Classification Designations | | | |
|--|-----|----------------|----------------|
| System | Y/N | Route | Designation |
| NHS Project | No | Not Applicable | Not Applicable |
| Functional Classification | No | Not Applicable | Not Applicable |
| Federal Aid Eligible Facility | No | Not Applicable | Not Applicable |

| Additional RTP Consistency Check Areas |
|--|
| 1. Is the project designated as a Transportation Control Measure? No. |
| 2. Is the project identified on the Congestion Management Process (CMP) plan? No. |
| 3. Is the project included as part of the approved: UPWP? No. Not Applicable |
| 3a. If yes, is an amendment required to the UPWP? No. |
| 3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes. |
| 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable. |
| 4. Applicable 2023 RTP Goal: Goal # 1 - Mobility Options: Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled. |
| 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost. |

| Public Notification/Opportunity to Comment Consistency Requirement |
|--|
| 1. Is a 30-day/opportunity to comment period required as part of the amendment? Yes. |
| 2. What are the start and end dates for the comment period? Estimated to be January 30, 2024 to February 28, 2024 |
| 3. Was the comment period completed consistent with the Metro Public Participation Plan? Yes. |
| 4. Was the comment period included on the Metro website allowing email submissions as comments? Yes. |
| 5. Did the project amendment result in a significant number of comments? Not expected. |
| 6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? Not expected. |
| 7. Added notes: |

Fund Codes References

| | |
|------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| STBG | Surface Transportation Block Grant funds. A federal funding source (FHWA based) appropriated to the State DOT. The Surface Transportation Block Grant Program (STBG) promotes flexibility in State and local transportation decisions and provides flexible funding to best address State and local transportation needs. |
| State STBG | Appropriated STBG that remains under ODOT's management and commitment to eligible projects. |

Project Location Reference - Region-wide Application
The project grouping bucket (PGB) is a region-wide funding reserve at this time



Statewide Transportation Improvement Program
Amendment Project Summary

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Key Number: 22322 2024-2027 STIP

Project Name: Oregon Transportation Network - TriMet FFY23 (DRAFT AMENDMENT)

| Fund Codes | | | | | | | | | | | |
|---------------------|------------------|---|------------------|---------------------|-----------------|---------------------|---------------|---------------------|---------------|-------------------|-------------------|
| Phase | Fund Code | Description | Percent of Phase | Total Amount | Federal Percent | Federal Amount | State Percent | State Amount | Local Percent | Local Amount | |
| OT | Y240 | Surface Transportation Block Grant (STBG) - Flex IIIA | 100.00% | 1,701,443.00 | 89.73% | 1,526,704.00 | 0.00% | 0.00 | 10.27% | 174,739.00 | |
| | OT Totals | | 100.00% | 1,701,443.00 | | 1,526,704.00 | | 0.00 | | 174,739.00 | |
| Grand Totals | | | | | | 1,701,443.00 | | 1,526,704.00 | | 0.00 | 174,739.00 |



Metro
 2024-27 Metropolitan Transportation Improvement Program (MTIP)
 PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
ADD NEW PROJECT
 Add new ODOT Regional
 Rideshare PGB to the MTIP

Project #3

Project Details Summary

| | | | | | | | |
|--------------------|-----------|--------------------|-----|--------------------|-------|---------------------------------------|------------------|
| ODOT Key # | 23541 | RFFA ID: | N/A | RTP ID: | 11054 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | New - TBD | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | Yes, 5310 |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | 24-27-0455 | |

Summary of Amendment Changes Occurring:

The formal MTIP Amendment adds the new ODOT Public Transit Division to support regional rideshare activities. The STBG funds will be transferred to FTA program 5310 for delivery. Projects: Ride Connection, Inc. The funding originates from FFY 2023 and received DOT's Director approval to commit the funds on 1/5/2024. The funding will initially be programmed into a project grouping bucket (PGB) with later approved projects then authorized to implement and expend the funds.

| | | | | | | | |
|----------------------------|--|--------------------------------|------|-------------------------------|-----|--|--|
| Project Name: | Oregon Transportation Network - Ride Connection | | | | | | |
| Lead Agency: | ODOT | Applicant: | ODOT | Administrator: | FTA | | |
| Certified Agency Delivery: | N/A | Non-Certified Agency Delivery: | N/A | Delivery as Direct Recipient: | Yes | | |

Short Description:

Urbanized public transit capital funding project grouping bucket (PGB) to be used for gas bus and van replacement, as well as preventative maintenance and mobility management for federal fiscal year 2023.

MTIP Detailed Description (Internal Metro use only):

Metro region-wide application across all three urbanized counties (Clackamas, Multnomah, and Washington Counties) to provide gas bus and van replacement as well as preventative maintenance and mobility management needs supporting FTA Section 5310 elderly and disabled type service needs.

STIP Description: Urbanized public transit capital funding to be used for gas bus and van replacement, as well as preventative maintenance and mobility management for federal fiscal year 2023.

| Project Classification Details | | | |
|--------------------------------|-------------------|----------------------------|------------------------|
| Project Type | Category | Features | System Investment Type |
| Transit | Transit - Capital | Capital Vehicle Operations | Transit |
| ODOT Work Type: | TRANSIT | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|------------------------|-----------|------|----------|------------------------------|--------------------|-------------------------|---------------------|--------------|--------------|
| Federal Funds | | | | | | | | | |
| State STBG | Y240 | 2024 | | | | | | \$ 1,979,194 | \$ 1,979,194 |
| | | | | | | | | | \$ - |
| Federal Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,979,194 | \$ 1,979,194 |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------|
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|------------|------------|
| Local | Match | 2025 | | | | | | \$ 226,528 | \$ 226,528 |
| | | | | | | | | | \$ - |
| Local Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 226,528 | \$ 226,528 |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------------|----------|------|------|------|------|--------------|--------------|
| Existing Programming Totals: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Amended Programming Totals | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,205,722 | \$ 2,205,722 |
| Total Estimated Project Cost | | | | | | | \$ 2,205,722 |
| Total Cost in Year of Expenditure: | | | | | | | \$ 2,205,722 |

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|-------------------------------------|------|------|------|--------------|--------------|
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,205,722 | \$ 2,205,722 |
| Phase Change Percent: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |
| Amended Phase Matching Funds: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 226,528 | \$ 226,528 |
| Amended Phase Matching Percent: | N/A | N/A | N/A | N/A | N/A | 10.27% | 10.27% |

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------------|--------------|
| Federal | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,979,194 | \$ 1,979,194 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 226,528 | \$ 226,528 |
| Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,205,722 | \$ 2,205,722 |

Phase Composition Percentages

| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
|-----------|----------|------|------|------|------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 89.73% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.27% | 10.27% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

Phase Programming Percentage

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 89.73% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.27% | 10.27% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|---|----------|------------|-----|---------------------------------------|------|------------------------------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | N/A |
| EA Number: | | | | | | | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | | | | | | FMIS or TRAMS |
| Known Expenditures: | | | | | | | TrAMS |
| | | | | | | Estimated Project Completion Date: | 12/31/2028 |
| Completion Date Notes: | | | | | | | |
| Are federal funds being flex transferred to FTA? | | Yes | | If yes, expected FTA conversion code: | | 5310 | |
| Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. | | | | | | | |

| Fiscal Constraint Consistency Review | |
|--|--|
| 1. What is the source of funding? | ODOT |
| 2. Does the amendment include changes or updates to the project funding? | Yes. The funding represents new funding in support of regional rideshare program activities |
| 3. Was proof-of-funding documentation provided to verify the funding change? | Yes, via the STIP Impacts Worksheet |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? | The ODOT Director was required to sign-off and approved the funding commitment |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? | Yes |

| Project Location References | | | | | |
|--|-------------------|----------------|----------------|----------------|----------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Cross Streets | Route or Arterial | | Cross Street | | Cross Street |
| | Not Applicable | | Not Applicable | | Not Applicable |
| Note: The Ride Connection PGB will be implemented region-wide. | | | | | |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|----------------|----------------|----------------|------------------------|----------------|---|----------------|
| 1st Year Programmed | 2024 | Years Active | 0 | Project Status | T22 - New | Programming actions in progress or programmed in current MTIP | |
| Total Prior Amendments | 0 | Last Amendment | Not Applicable | Date of Last Amendment | Not Applicable | Last MTIP Amend Num | Not Applicable |
| Last Amendment Action | Not Applicable | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|--|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Notes |
| | X | X | | | X | X | Equity note: Since specific projects have not yet been identified, an equity performance determination can not be made at this time. |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Air Quality - Continuation of ride-sharing and van-pooling promotion activities at current levels. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | ID# 11054 - Regional Travel Options (RTO) Program Activities for 2023-2030 |
| RTP Project Description: | Education, services, and small capital projects that promote and make transit, bicycling, walking and ridesharing easier to use. Program elements are delivered by local government agencies, community nonprofit organizations and colleges with US and Oregon Department of Transportation funding allocated by the Metro Regional Travel Options program. The program helps the region meet goals for increased access to jobs, education and services and to reduce motor vehicle miles traveled. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|--|
| Yes/No | Network | Designation |
| No | Motor Vehicle | Not Applicable. Project grouping bucket (PGB) with specific projects to be identified later ↓ |
| No | Transit | |
| No | Freight | |
| No | Bicycle | |
| No | Pedestrian | |

| National Highway System and Functional Classification Designations | | | |
|--|-----|----------------|----------------|
| System | Y/N | Route | Designation |
| NHS Project | No | Not Applicable | Not Applicable |
| Functional Classification | No | Not Applicable | Not Applicable |
| Federal Aid Eligible Facility | No | Not Applicable | Not Applicable |

| Additional RTP Consistency Check Areas |
|---|
| 1. Is the project designated as a Transportation Control Measure? No. |
| 2. Is the project identified on the Congestion Management Process (CMP) plan? No. |
| 3. Is the project included as part of the approved: UPWP? No. Not Applicable |
| 3a. If yes, is an amendment required to the UPWP? No. |
| 3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes. |
| 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable. |
| 4. Applicable 2023 RTP Goal: <u>Goal # 1 - Mobility Options:</u> Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled. <u>Goal #2 - Safe System:</u> Objectives 2.1 Vision Zero – Eliminate fatal and severe injury crashes for all modes of travel by 2035. <u>Goal #5 - Climate Action and Resilience:</u> Objective 5.1 Climate Change Mitigation: Meet adopted targets for reducing transportation-related greenhouse gas emissions and vehicle miles traveled per capita in order to slow climate change. |
| 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost. |

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be January 3, 2024 to February 2, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Not expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Not expected.**
7. Added notes:

Fund Codes References

| | |
|------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| STBG | Surface Transportation Block Grant funds. A federal funding source (FHWA based) appropriated to the State DOT. The Surface Transportation Block Grant Program (STBG) promotes flexibility in State and local transportation decisions and provides flexible funding to best address State and local transportation needs. |
| State STBG | Appropriated STBG that remains under ODOT's management and commitment to eligible projects. |

Project Location Reference - Region-wide Application
The project grouping bucket (PGB) will award funding to specific projects later across the Metropolitan Planning Area (MPA)



| Fund Codes | | | | | | | | | | |
|------------|---------------------|---|------------------|---------------------|-----------------|---------------------|---------------|--------------|---------------|-------------------|
| Phase | Fund Code | Description | Percent of Phase | Total Amount | Federal Percent | Federal Amount | State Percent | State Amount | Local Percent | Local Amount |
| OT | Y240 | Surface Transportation Block Grant (STBG) - Flex IIIA | 100.00% | 2,205,721.00 | 89.73% | 1,979,194.00 | 0.00% | 0.00 | 10.27% | 226,527.00 |
| | OT Totals | | 100.00% | 2,205,721.00 | | 1,979,194.00 | | 0.00 | | 226,527.00 |
| | Grand Totals | | | 2,205,721.00 | | 1,979,194.00 | | 0.00 | | 226,527.00 |



Metro
 2024-27 Metropolitan Transportation Improvement Program (MTIP)
 PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new Line 33 TSP CRP
 funded project to the MTIP

Project #4

Project Details Summary

| | | | | | | | |
|--------------------|-----|--------------------|-----|--------------------|-------|---------------------------------------|------------------|
| ODOT Key # | NEW | RFFA ID: | N/A | RTP ID: | 10927 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | NEW | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | Yes, 5307 |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | TBD | |

Summary of Amendment Changes Occurring:
 The formal adds the new Transit Signal Priority (TSP) upgrade project awarded with Metro Carbon Reduction Program (CRP) funds. The CRP funds will be flex transferred to FTA.

| | | | | | | | |
|----------------------------|---|--------------------------------|--------|-------------------------------|-----|--|--|
| Project Name: | TriMet Line 33 Traffic Signal Priority Upgrade | | | | | | |
| Lead Agency: | TriMet | Applicant: | TriMet | Administrator: | FTA | | |
| Certified Agency Delivery: | No | Non-Certified Agency Delivery: | No | Delivery as Direct Recipient: | Yes | | |

Short Description:
 Design and implement the next generation transit signal priority (TSP) upgrade along TriMet's Line 33 to improve reliability of transit service

MTIP Detailed Description (Internal Metro use only):
 In the southeast Metro region along TriMet's bus Line 33 from Clackamas Town Center on King Road/Harrison in the north and then south along Mcloughlin Blvd (OR99E) to Molalla and Clackamas Community College, design and implement the next generation transit signal priority (TSP) upgrade along TriMet's Line 33 to improve reliability of transit service

STIP Description: TBD

Project Classification Details

| Project Type | Category | Features | System Investment Type |
|-----------------|----------------------|-----------------------------------|---|
| Transit | Transit - Operations | Systems Management and Operations | Systems Management, ITS, and Operations |
| Highway | Highway - Transit | | |
| ODOT Work Type: | TBD | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|------------------------------------|-----------|------|-----------------|------------------------------|--------------------|-------------------------|---------------------|-----------------|-----------------|
| Federal Funds | | | | | | | | | |
| Carbon | Y601 | 2024 | | \$ 1,166,490 | | | | | \$ 1,166,490 |
| Carbon | Y601 | 2024 | | | | | \$ 1,345,950 | | \$ 1,345,950 |
| Carbon | Y601 | 2024 | | | | | | \$ 1,487,560 | \$ 1,487,560 |
| Federal Totals: | | | \$ - | \$ 1,166,490 | \$ - | \$ - | \$ 1,345,950 | \$ 1,487,560 | \$ 4,000,000 |
| State Funds | | | | | | | | | |
| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local Funds | | | | | | | | | |
| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
| Local - STIF | Match | 2024 | | \$ 133,510 | | | | | \$ 133,510 |
| Local - STIF | Match | 2024 | | | | | \$ 154,050 | | \$ 154,050 |
| Local - STIF | Match | 2024 | | | | | | \$ 170,258 | \$ 170,258 |
| Local Totals: | | | \$ - | \$ 133,510 | \$ - | \$ - | \$ 154,050 | \$ 170,258 | \$ 457,818 |
| Phase Totals | | | Planning | PE | ROW | UR | Cons | Other | Total |
| Existing Programming Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Amended Programming Totals | | | \$ - | \$ 1,300,000 | \$ - | \$ - | \$ 1,500,000 | \$ 1,657,818 | \$ 4,457,818 |
| Total Estimated Project Cost | | | | | | | | | \$ 4,457,818 |
| Total Cost in Year of Expenditure: | | | | | | | | | \$ 4,457,818 |

Programming Notes:

1. TriMet's STIF funds are part of their regular STIF allocation. They are not part of a special grant award from the ODOT Public Transit Division. These STIF funds do not require any reimbursement involvement through ODOT now that they are allocated. While they originate from ODOT as State funds, they are programmed as local funds and called out as a special type of local fund.
2. The Metro awarded federal Carbon funds are being programmed based on a federal share of 89,73% and a minimum local match requirement of 10.27%.
3. Phase programming is occurring the FTA's approved logic of single year obligation logic which enables the TrAMS grant with the entire funding to be approved at once per FTA's obligation process.

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|-------------------------------------|------|------|--------------|--------------|--------------|
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ 1,300,000 | \$ - | \$ - | \$ 1,500,000 | \$ 1,657,818 | \$ 4,457,818 |
| Phase Change Percent: | 0.0% | 100.0% | 0.0% | 0.0% | 100.0% | 100.0% | 100.0% |
| Amended Phase Matching Funds: | \$ - | \$ 133,510 | \$ - | \$ - | \$ 154,050 | \$ 170,258 | \$ 457,818 |
| Amended Phase Matching Percent: | N/A | 10.27% | NA | N/A | 10.27% | 10.27% | 10.27% |

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------------|--------------|
| Federal | \$ - | \$ 1,166,490 | \$ - | \$ - | \$ 1,345,950 | \$ 1,487,560 | \$ 4,000,000 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ 133,510 | \$ - | \$ - | \$ 154,050 | \$ 170,258 | \$ 457,818 |
| Total | \$ - | \$ 1,300,000 | \$ - | \$ - | \$ 1,500,000 | \$ 1,657,818 | \$ 4,457,818 |

Phase Composition Percentages

| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
|--------------|----------|--------|------|------|--------|--------|--------|
| Federal | 0.0% | 89.73% | 0.0% | 0.0% | 89.73% | 89.73% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 10.27% | 0.0% | 0.0% | 10.27% | 10.27% | 10.27% |
| Total | 0.0% | 100.0% | 0.0% | 0.0% | 100.0% | 100.0% | 100.0% |

Phase Programming Percentage

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------|--------|
| Federal | 0.0% | 26.2% | 0.0% | 0.0% | 30.2% | 33.4% | 89.73% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 2.99% | 0.0% | 0.0% | 3.46% | 3.82% | 10.27% |
| Total | 0.0% | 29.16% | 0.0% | 0.0% | 33.65% | 37.19% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|---|----------|----------------|-----|---------------------------------------|------------------------------------|----------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | N/A |
| EA Number: | | Not Applicable | | | Not Applicable | Not Applicable | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | Not Applicable | | | Not Applicable | Not Applicable | FMIS or TRAMS |
| Known Expenditures: | | | | | | | TrAMS |
| | | | | | Estimated Project Completion Date: | | 12/31/2027 |
| Completion Date Notes: | | | | | | | |
| Are federal funds being flex transferred to FTA? | | Yes | | If yes, expected FTA conversion code: | | 5307 | |
| Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. | | | | | | | |

| Fiscal Constraint Consistency Review | |
|---|--|
| 1. What is the source of funding? Metro awarded Carbon Reduction Program (CRP) funds | |
| 2. Does the amendment include changes or updates to the project funding? Yes. The formal amendment splits the awarded CRP funds off from the CRP PGB and commits the funds to the new Line 33 TSP project. | |
| 3. Was proof-of-funding documentation provided to verify the funding change? Yes through Metro Council approval for the funding. | |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? The CRP funding award required Metro Council approval which occurred on June 15, 2023. | |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes. | |

| Project Location References | | | | | |
|---|----------------------|----------------|-----------------------|----------------|-----------------------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Cross Streets | Route or Arterial | | Cross Street/Area | | Cross Street/Area |
| Line 33 | Harrison/King/82nd | | Milwaukie City Center | | Clackamas Town Center |
| | Mcloughlin Blvd/Main | | Milwaukie City Center | | South Mcloughlin High |
| | Molalla | | South Mcloughlin High | | Clackamas Community College |
| Note: See TriMet Line 33 Route map at the end of the MTIP Worksheet for additional arterial references. | | | | | |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|----------------|----------------|----------------|------------------------|----------------|---|----------------|
| 1st Year Programmed | 2024 | Years Active | 1 | Project Status | T22 | Programming actions in progress or programmed in current MTIP | |
| Total Prior Amendments | 0 | Last Amendment | Not Applicable | Date of Last Amendment | Not Applicable | Last MTIP Amend Num | Not Applicable |
| Last Amendment Action | Not Applicable | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|---|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Equity Notes People of Color (POC) = Yes Limited English Proficiency (LEP) = Yes Low Income (LI) = Yes In the northeastern portion of line 33 |
| | X | X | | X | X | X | |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Table 2, Mass Transit - Construction or renovation of power, signal, and communications systems. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | ID# 10927 - Operating Capital: Information Technology: Phase 1 |
| RTP Project Description: | Communication systems, information technology, cyber security and improvements to Hop. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|---|
| Yes/No | Network | Designation |
| Yes | Motor Vehicle | Multiple designations along the Line 33 route |
| Yes | Transit | Frequent bus and future HCT across the Line 33 route segments |
| Yes | Freight | Roadway Connector (along Mcloughlin) |
| Yes | Bicycle | Regional Bikeway (along Mcloughlin) |
| Yes | Pedestrian | Pedestrian Parkway (along Mcloughlin) |

Note: Based on the above network designation, the project is considered regionally significant and an "on-system" improvement.

| National Highway System and Functional Classification Designations | | | |
|--|-----|------------|------------------------------------|
| System | Y/N | Route | Designation |
| NHS Project | Yes | Mcloughlin | MP 21 - Principal Arterial |
| Functional Classification | No | Mcloughlin | 3 = Urban Other Principal Arterial |
| Federal Aid Eligible Facility | No | Mcloughlin | Other Principal Arterial |

| Additional RTP Consistency Check Areas |
|--|
| 1. Is the project designated as a Transportation Control Measure? No. |
| 2. Is the project identified on the Congestion Management Process (CMP) plan? Yes. |
| 3. Is the project included as part of the approved: UPWP? No |
| 3a. If yes, is an amendment required to the UPWP? Not Applicable. |
| 3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes. |
| 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable. |
| 4. Applicable RTP Goals: <u>Goal #1 - Mobility Options:</u> Objective 1.3 - Access to Transit: Increase household and job access to current and planned frequent transit service. <u>Goal #2 - Safe System:</u> Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035. <u>Goal #3 - Equitable Transportation:</u> Objective 3.1 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs. <u>Goal # 5 - Climate Action and Resilience:</u> Objective 5.2 - Climate Friendly Communities: Increase the share of jobs and households in walkable, mixed-use areas served by current and planned frequent transit service. |
| 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost. |

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Tuesday, January 30, 2024 through Thursday February 28, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Not expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Not expected.**

Fund Codes References

| | |
|------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| Local-STIF | ODOT allocated state funds to eligible transit agencies. The Statewide Transportation Improvement Fund (STIF) program was established in Section 122 of House Bill 2017 to provide a dedicated source of funding for improving, maintaining, and expanding public transportation for all users. Every two years, public transportation funding is made available to support access to jobs, improve mobility, relieve congestion, and reduce greenhouse gas emission in Oregon. These specific allocated funds do not require further ODOT involvement and are considered for programming purposes to be a specialized type of local funds. |
| Carbon | Federal Carbon Reduction Program (CRP) funds appropriated to the state DOT. A portion is allocated to Metro for eligible projects in urbanized areas. The purpose of the Carbon Reduction Program is to reduce transportation emissions through the development of State carbon reduction strategies and by funding projects designed to reduce transportation emissions. The federal funds have a standard 10.27% required match. |



Council meeting agenda

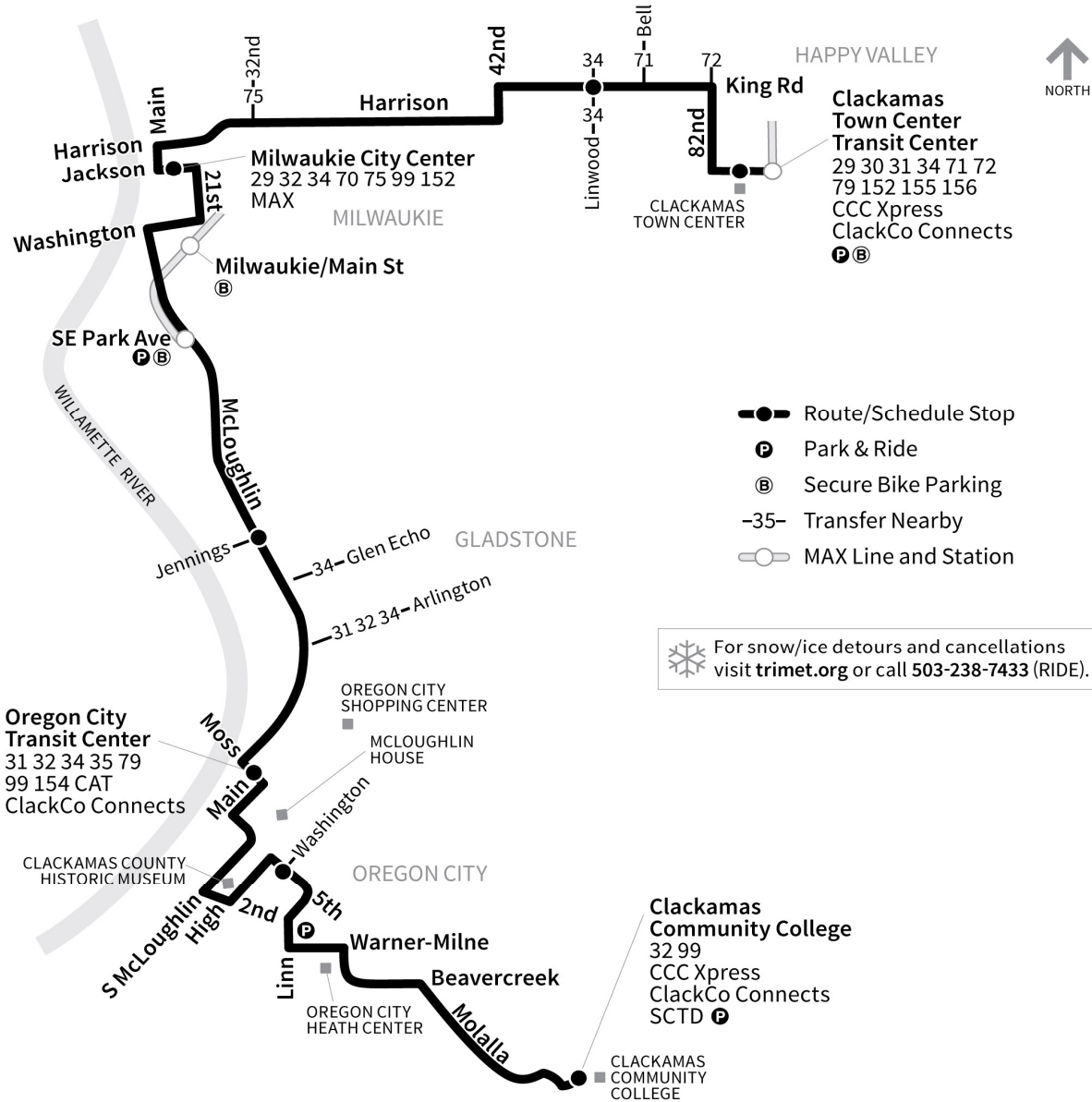
Thursday, June 15, 2023 10:30 AM Metro Regional Center, Council Chamber,
[https://www.youtube.com/live/vSo1bjfjSI?feature=share,](https://www.youtube.com/live/vSo1bjfjSI?feature=share)
<https://zoom.us/j/615079992> Webinar ID:
 615 079 992 or 888-475-4499 (toll free)

**Exhibit A to Staff Report of Resolution 23-5337
 Project Allocation List and Project Descriptions**

| TPAC Recommended Investment Package | |
|---|--------------------|
| Tualatin Valley Highway Bus Rapid Transit | \$5,000,000 |
| 82 nd Avenue Bus Rapid Transit | \$5,000,000 |
| Line 33 McLoughlin Transit Signal Priority | \$4,000,000 |
| Climate Smart Implementation Program | \$1,800,000 |
| Transportation System Management & Operations | \$3,000,000 |
| Subtotal: | \$18,800,000 |

Line 33 - McLoughlin Corridor Transit Signal Priority (TSP): Expansion of next generation transit signal priority first implemented in the Division Transit corridor to improve reliability of transit service. Expands capability of TriMet to implement TSP with new project partners and independent of a Bus Rapid Transit project in anticipation of implementing additional TSP projects across the region. Any remaining funds may also be used on systemic TSP needs to make the Line 33 elements perform optimally or on small capital stop amenities or safe transit access elements in the corridor. Project scope and funding would be coordinated with, and not displace, funding from other potential sources such as Congressionally directed spending or tolling mitigation funding.

33-McLoughlin/King Rd





Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new TriMet project
 development for the 82nd BRT

Project #5

| Project Details Summary | | | | | | | |
|-------------------------|----------------|--------------------|-----|--------------------|-------|---------------------------------------|------------------|
| ODOT Key # | 23580 | RFFA ID: | N/A | RTP ID: | 12029 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | New-TBD | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | Yes, 5307 |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | TBD | |

Summary of Amendment Changes Occurring:
 The formal amendment adds the new 82nd Ave Bus Rapid Transit (BRT) Project Development project for TriMet. The project development activities will complete design and NEPA actions in support TriMet's effort to obtain a FTA Small Starts grant for the construction phase. The TriMet project includes a \$5 million award from ODOT. The total estimated phase cost is \$30 million dollars. The total estimate project cost is \$300,000,000. The past January Formal Amendment bundle includes a similar partnering, but separate Metro funded project supporting TriMet's project development activities. The split programming approach is necessary and has been approved by FTA.

| | | | | | | | |
|----------------------------|--|--------------------------------|--------|--|-------------------------------|------------|--|
| Project Name: | 82nd Ave Bus Rapid Transit Project Development: PDX - Sunnyside Ave | | | | | | |
| Lead Agency: | TriMet | Applicant: | TriMet | | Administrator: | FTA | |
| Certified Agency Delivery: | No | Non-Certified Agency Delivery: | No | | Delivery as Direct Recipient: | Yes | |

Short Description:
 Complete project development activities in support of the planned new 82nd Ave BRT including preliminary design, addressing NEPA requirements, development of FTA rating materials and other activities needed to obtain a Small Starts grant

MTIP Detailed Description (Internal Metro use only):
 In Portland proposed on 82nd Ave from Sunnyside Ave in the south and then north to Airport Way/PDX, complete project development activities in support of the new 82nd Ave BRT including preliminary design, addressing NEPA requirements, development of FTA rating materials and other activities needed to support the next stage to obtain a Small Starts grant for the project.

STIP Description: TBD

| Project Classification Details | | | |
|--------------------------------|-----------------|---------------------------|------------------------|
| Project Type | Category | Features | System Investment Type |
| Transit | Transit Capital | Capital Bus Rapid Transit | Capital Improvement |
| ODOT Work Type: | TBD | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|------------------------|-----------|------|----------|------------------------------|--------------------|-------------------------|---------------------|-------|--------------|
| Federal Funds | | | | | | | | | |
| State STBG | Y240 | 2024 | | \$ 5,000,000 | | | | | \$ 5,000,000 |
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| Federal Totals: | | | \$ - | \$ 5,000,000 | \$ - | \$ - | \$ - | \$ - | \$ 5,000,000 |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------|
| | | | | | | | | | \$ - |
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|---------------|
| Local (Y240) | Match | 2024 | | \$ 572,272 | | | | | \$ 572,272 |
| Other | OTH0 | 2024 | | \$ 17,741,001 | | | | | \$ 17,741,001 |
| | | | | | | | | | \$ - |
| Local Totals: | | | \$ - | \$ 18,313,273 | \$ - | \$ - | \$ - | \$ - | \$ 18,313,273 |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------------|----------|-----------------|------|------|------|-------|-----------------|
| Existing Programming Totals: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Amended Programming Totals | \$ - | \$ 23,313,273 | \$ - | \$ - | \$ - | \$ - | \$ 23,313,273 |
| Total Estimated Project Cost | | | | | | | \$ 300,000,000 |
| Total Cost in Year of Expenditure: | | | | | | | \$ 300,000,000 |

Notes:

- The total PE phase estimate to complete project development activities (NEPA + PS&E) is \$30 million. The total estimate project cost is \$300 million per the 2023 RTP.
- A separate project development programmed project with Metro as lead agency is being programmed to keep agency obligations and expenditures separate. FTA has reviewed and approved the two-project programming approach.
- The FTA AOPP awards appear to be sourced from FTA Section 5305 funds. The AOP funds have a minimum match requirement of 10%. The federal share can't exceed 90%
- The State STBG funds will be flex transferred to FTA.

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|---|------|------|------|-------|---------------|
| Is the project short programmed? | Yes | The project is only programming the PE project development activities for now. The total estimated phase cost is \$30 million. A second project with \$6,686,626 of committed funds is programmed separately by Metro. The PE phase is funded at 100% of the cost estimate. | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ 23,313,273 | \$ - | \$ - | \$ - | \$ - | \$ 23,313,273 |
| Phase Change Percent: | 100.0% | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% |
| Amended Phase Matching Funds: | \$ - | \$ 572,272 | \$ - | \$ - | \$ - | \$ - | \$ 572,272 |
| Amended Phase Matching Percent: | N/A | 10.27% | N/A | N/A | N/A | N/A | 10.27% |

Notes:

- The ODOT \$5 million has a 10.27% minimum match requirement.
- The remaining \$17,741,000 is local overmatch provided by TriMet.
- TriMet is providing the local minimum match to the federal funds.

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|-------|---------------|
| Federal | \$ - | \$ 5,000,000 | \$ - | \$ - | \$ - | \$ - | \$ 5,000,000 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ 18,313,273 | \$ - | \$ - | \$ - | \$ - | \$ 18,313,273 |
| Total | \$ - | \$ 23,313,273 | \$ - | \$ - | \$ - | \$ - | \$ 23,313,273 |

| Phase Composition Percentages | | | | | | | |
|-------------------------------|----------|--------|------|------|------|-------|--------|
| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
| Federal | 0.0% | 21.4% | 0.0% | 0.0% | 0.0% | 0.0% | 21.45% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.00% | 78.6% | 0.0% | 0.0% | 0.0% | 0.0% | 78.55% |
| Total | 0.0% | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% |

| Phase Programming Percentage | | | | | | | |
|------------------------------|----------|------------------------------|--------------------|--------------------|--------------|-------|--------|
| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
| Federal | 0.0% | 21.4% | 0.0% | 0.0% | 0.0% | 0.0% | 21.45% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 78.6% | 0.0% | 0.0% | 0.0% | 0.0% | 78.55% |
| Total | 0.0% | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|----------------------------------|----------|----------------|-----|----|------|-------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | |
| EA Number: | | Not Applicable | | | | | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | Not Applicable | | | | | FMIS or TrAMS |
| Known Expenditures: | | | | | | | TrAMS |

| | | | | | | | |
|--|--|--|--|--|--|------------------------------------|------------|
| | | | | | | Estimated Project Completion Date: | 12/30/2026 |
| Completion Date Notes: The completion date is for the project development planning study effort only | | | | | | | |

| | | | |
|--|------------|---------------------------------------|-------------|
| Are federal funds being flex transferred to FTA? | YES | If yes, expected FTA conversion code: | 5307 |
|--|------------|---------------------------------------|-------------|

Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. This project will be under FTA oversight.

Fiscal Constraint Consistency Review

1. What is the source of funding? ODOT awarded State STBG to the project. The remaining local overmatch is being provided by TriMet. A separate project development project is being programmed with Metro as the lead with a total \$6,686,727 of federal CRP funds and match. Together both projects will support the completion of the project development required activities which have an estimated total of \$30 million.

2. Does the amendment include changes or updates to the project funding? **Yes. This is a new project being added to the MTP. The State STBG were verified by Salem as an award for the BRT project. The AOPP award was verified through FTA.**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, as noted above.**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **Salem program award confirmation was required and provided by ODOT for the State STBG funds.**
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? **Yes.**

| Project Location References | | | | | | |
|-----------------------------|-------------------|----------------|----------------|----------------|----------------|--|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length | |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable | |
| Cross Streets | Route or Arterial | | Cross Street | | Cross Street | |
| | 82nd Ave | | SE Powell Blvd | | NE Airport Way | |

Note: Routes or arterials with multiple site improvement locations shown as an aggregate total.

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|---------------------|----------------|------|------------------------|----------------|---|----------------|
| 1st Year Programmed | 2024 | Years Active | 0 | Project Status | T22 | Programming actions in progress or programmed in current MTIP | |
| Total Prior Amendments | 0 | Last Amendment | None | Date of Last Amendment | Not Applicable | Last MTIP Amend Num | Not Applicable |
| Last Amendment Action | Not. Not Applicable | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|---|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Notes |
| | X | X | | X | X | X | Equity Focus Areas: The project limits cross over several EFAs. Most are "yes". Overall People of Color (POC), Limited English (LE), and Limited Income(LI) = Yes |

RTP Air Quality Conformity and Transportation Modeling Designations

| | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | The project development portion is considered a planning effort and is not capacity enhancing. The full BRT project is considered capacity enhancing and requires transportation demand modeling analysis. |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | The project development portion (this project) is exempt for a conformity determination. Exemption reference is 40 CFR 93.126, Table 2, Other |
| Exemption Reference: | Other - Planning and technical studies. |
| Was an air analysis required as part of RTP inclusion? | Yes, the full constructed project requires transportation demand modeling analysis. The project development portion (this project) does not require modeling analysis. |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | Yes, the full constructed project has completed transportation demand modeling analysis as part of the new 2023 RTP based on the LPA. |
| RTP Constrained Project ID and Name: | ID#: 12029 - HCT: 82nd Ave Transit Project |
| RTP Project Description: | Contingent on federal, state and local funding commitments, the 82nd Ave Transit Project will improve travel between Clackamas Town Center and important destinations in NE Portland with easier, faster and more reliable bus service as well as necessary safety and accessibility improvements, paving and signals. |

Project Location in the Metro Transportation Network

| Yes/No | Network | Designation |
|--------|---------------|---|
| Yes | Motor Vehicle | Proposed LPA on 82nd Ave in the project limits is designated as a Major Arterial. |
| Yes | Transit | Proposed LPA on 82nd Ave in the project limits is designated as a Frequent Bus area. |
| Yes | Freight | Generally no designation. However, a small portion for 82nd Ave near the airport is designated as a Regional Intermodal Connector. |
| Yes | Bicycle | In some portions on 82nd Ave in the projects, the arterial is designated as a Regional Bikeway |
| Yes | Pedestrian | For most of the project limits, 82nd Ave is designated as a Pedestrian Parkway. Near the airport, the designation changes to be a Regional Pedestrian Corridor. |

| National Highway System and Functional Classification Designations | | | |
|--|-----|----------|---|
| System | Y/N | Route | Designation |
| NHS Project | Yes | 82nd Ave | MAP 21 NHS Principal Arterials and near the airport, the designation changes to be a Intermodal Connector |
| Functional Classification | Yes | 82nd Ave | Urban Other Principal Arterial |
| Federal Aid Eligible Facility | Yes | 82nd Ave | FHWA Functional Classification Code: 3 (Other Principal Arterial) |

| Additional RTP Consistency Check Areas |
|---|
| 1. Is the project designated as a Transportation Control Measure? No. |
| 2. Is the project identified on the Congestion Management Process (CMP) plan? Yes |
| 3. Is the project included as part of the approved: UPWP? Yes. |
| 3a. If yes, is an amendment required to the UPWP? The SFY 2025 UPWP is being updated to include the project. |
| 3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes. |
| 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Non-Metro Funded Stand-Alone project. |
| 4. Applicable 2023 RTP Goals: <u>Goal #1 - Mobility Options:</u> Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled. <u>Goal #2 - Safe System:</u> Objective 2.1 Vision Zero –Eliminate fatal and severe injury crashes for all modes of travel by 2035. <u>Goal #3 - Equitable Transportation:</u> Objective 3.1 - Transportation Equity - Eliminate disparities related to access, safety, affordability and health outcomes experienced by people of color and other marginalized communities. <u>Goal #5 - Climate Action and Resilience:</u> Objective 5.1 - Climate Change Mitigation: Meet adopted targets for reducing transportation-related greenhouse gas emissions and vehicle miles traveled per capita in order to slow climate change. |
| 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No and Yes. The planning project portion (this project) is not subject to the special performance assessment requirement. The full project once funded will be subject to a special performance assessment evaluation as it exceeds \$100 million in total project cost and is capacity enhancing. |

Public Notification/Opportunity to Comment Consistency Requirement

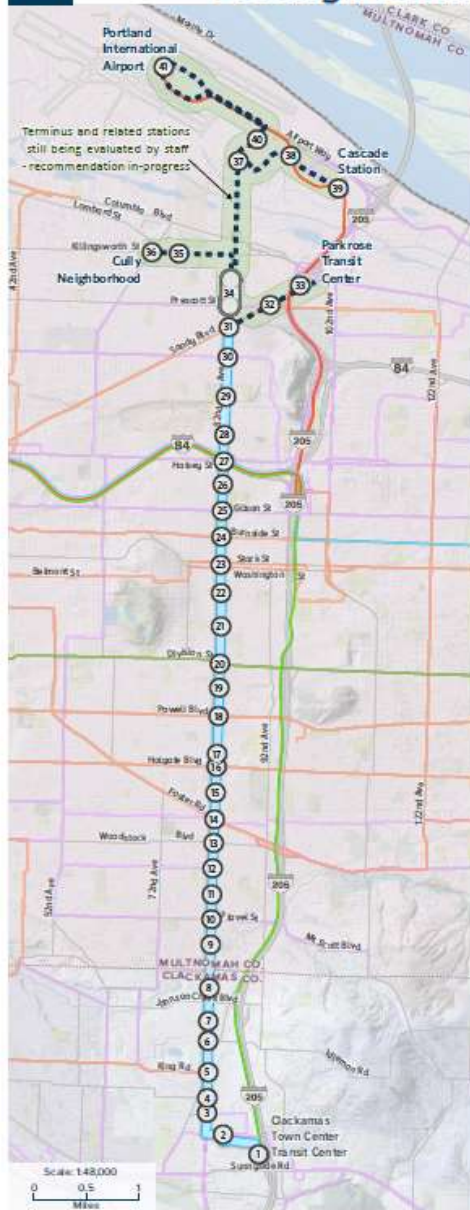
1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Yes, January 30, 2024 through February 28, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Some comments are expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Yes. For this specific project amendment, Metro may receive a sufficient number of comments that may require a comment log.**

Fund Codes References

| | |
|------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| Other | Additional local funds committed to the project above the minimum match requirement to address phase costs. Also referred to as "overmatch" funds. |
| STBG | Surface Transportation Block Grant funds. A federal funding source (FHWA based) appropriated to the State DOT. The Surface Transportation Block Grant Program (STBG) promotes flexibility in State and local transportation decisions and provides flexible funding to best address State and local transportation needs. |
| State STBG | STBG funds under ODOT's direct management which are then allocated to eligible projects |



82nd Avenue Transit Project: Discussion Draft Locally Preferred Alternative



Elements of Locally Preferred Alternative (in progress)*

- Bus rapid transit route (north of Sandy Blvd)
 - Potential terminus routing (terminus tbd)
 - General station locations
 - Station location areas still being defined
- Transit Network**
- Green MAX line
 - Red MAX line
 - Blue MAX line
 - Blue, green, red MAX lines
 - FX-2 frequent express service bus line
 - Frequent service bus lines
 - Other bus lines
 - Transit centers

*To be recommended by Steering Committee

| Map Key | Proposed General Station Locations |
|---------|--|
| 1 | Cockamans Town Center Transit Center |
| 2 | Cockamans Town Center |
| 3 | SE Cassweg Ave & SE 82nd Ave |
| 4 | South of SE Boyer Dr (Wood) & SE 82nd Ave |
| 5 | SE King Rd & SE 82nd Ave |
| 6 | SE City Rd & SE 82nd Ave |
| 7 | SE Overland St & SE 82nd Ave |
| 8 | SE Lindy St & SE 82nd Ave |
| 9 | SE Crystal Springs Blvd & SE 82nd Ave |
| 10 | SE Rowell St & SE 82nd Ave |
| 11 | SE Bybee & SE 82nd Ave |
| 12 | SE Dulka St & SE 82nd Ave |
| 13 | SE Woodstock St & SE 82nd Ave |
| 14 | SE Foster Rd & SE 82nd Ave |
| 15 | SE Raymond St & SE 82nd Ave |
| 16 | SE Holgate Blvd & SE 82nd Ave |
| 17 | SE Bower St & SE 82nd Ave |
| 18 | SE Praxell Blvd & SE 82nd Ave |
| 19 | SE Woodward St & SE 82nd Ave |
| 20 | SE Division St & SE 82nd Ave |
| 21 | SE M4 St & SE 82nd Ave |
| 22 | SE Taylor Ct & SE 82nd Ave |
| 23 | SE Stark St / SE Washington St & NE 82nd Ave |
| 24 | E Burnside St & NE 82nd Ave |
| 25 | NE Gilson St & NE 82nd Ave |
| 26 | NE Holladay St & NE 82nd Ave |
| 27 | I-84 & NE 82nd Ave |
| 28 | NE Tillamook St & NE 82nd Ave |
| 29 | McDonnell High School & NE 82nd Ave |
| 30 | NE Fremont St & NE 82nd Ave |
| 31 | NE Sandy Blvd & NE 82nd Ave |
| 32 | NE Prescott St & NE Sandy Blvd |
| 33 | Parkrose Transit Center |
| 34 | NE Prescott or Alberta St & NE 82nd Ave |
| 35 | NE 72nd Ave & NE Lombard St |
| 36 | NE Cully Blvd & NE Klingworth St |
| 37 | NE Alderwood Rd & NE 82nd Ave |
| 38 | M1Hood Ave MAX |
| 39 | Cascades MAX Station |
| 40 | NE Air Cargo Rd & NE 82nd Way |
| 41 | POX Terminal |



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
ADD FUNDS
 Adjust 5310 formula funds and
 add local overmatch

Project #6

| Project Details Summary | | | | | | | |
|-------------------------|-------|-------------|-----|--------------------|-------|----------------------------|------------|
| ODOT Key # | 23189 | RFFA ID: | N/A | RTP ID: | 12096 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | 71318 | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | No |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | TBD | |

Summary of Amendment Changes Occurring: The formal amendment adjusts the estimate 5310 appropriation that will occur and adds local overmatch to better reflect the total cost of the project. Adding the local overmatch results in a cost change of \$1,798,366 or a 60% increase to the project. The increase is well above the 30% threshold for completing cost changes administratively.

| | | | | | | | |
|----------------------------|---|--------------------------------|--------|--|-------------------------------|-----|--|
| Project Name: | Enhanced Seniors Mobility/ Individuals w/Disabilities (2026) | | | | | | |
| Lead Agency: | TriMet | Applicant: | TriMet | | Administrator: | FTA | |
| Certified Agency Delivery: | No | Non-Certified Agency Delivery: | No | | Delivery as Direct Recipient: | Yes | |

Short Description:
 Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2026

MTIP Detailed Description (Internal Metro use only):
 Section 5310 funding supports elderly and persons with disability services (capital and operating expenses). Funds mobility management activities, purchase of services, operating, and preventive maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area. Funds will be passed through to Ride Connection and used for TriMet’s LIFT Paratransit services (5310 FFY 2026 allocation via UZA apportionment)

STIP Description:
 Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland urbanized area in federal fiscal year 2026.

| Project Classification Details | | | |
|--------------------------------|--------------------|----------|---|
| Project Type | Category | Features | System Investment Type |
| Transit | Transit Operations | | Systems Management, ITS, and Operations |
| ODOT Work Type: | TRANSIT | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|-------------------------|-----------------|-----------------|----------|------------------------------|--------------------|-------------------------|---------------------|-------------------------|--------------|
| Federal Funds | | | | | | | | | |
| 5310 (80/20) | 5310 | 2026 | | — | | | | \$ 1,891,421 | \$ - |
| 5310 (80/20) | 5310 | 2026 | | | | | | \$ 2,081,321 | \$ 2,081,321 |
| 5310 (505/50) | 5310 | 2026 | | | | | | \$ 316,500 | \$ 316,500 |
| Federal Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,397,821 | \$ 2,397,821 |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------|
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|--------------------------|------------------|-----------------|----------|------------------------------|--------------------|--------------------|--------------|-----------------------|--------------|
| Local (80/20) | Match | 2026 | | | | | | \$ 472,855 | \$ - |
| Local (80/20) | Match | 2026 | | | | | | \$ 520,330 | \$ 520,330 |
| Local (50/50) | Match | 2026 | | | | | | \$ 316,500 | \$ 316,500 |
| Other | OTH0 | 2026 | | | | | | \$ 1,560,991 | \$ 1,560,991 |
| Local Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,397,821 | \$ 2,397,821 |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------------|----------|------|------|------|------|-------------------------|-------------------------|
| Existing Programming Totals: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,997,276 | \$ 2,997,276 |
| Amended Programming Totals | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 4,795,642 | \$ 4,795,642 |
| Total Estimated Project Cost | | | | | | | \$ 4,795,642 |
| Total Cost in Year of Expenditure: | | | | | | | \$ 4,795,642 |

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|-------------------------------------|------|------|------|--------------|--------------|
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,798,366 | \$ 1,798,366 |
| Phase Change Percent: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 60.0% | 60.0% |
| Amended Phase Matching Funds: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 836,830 | \$ 836,830 |
| Amended Phase Matching Percent: | N/A | N/A | N/A | N/A | N/A | 17.45% | 17.45% |

Note: The 5310 contributions have different minimum matching requirement: One is 20% and the other is 50%. With the overmatch TriMet's total match is 50%.

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------------|--------------|
| Federal | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,397,821 | \$ 2,397,821 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,397,821 | \$ 2,397,821 |
| Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 4,795,642 | \$ 4,795,642 |

Phase Composition Percentages

| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
|-----------|----------|------|------|------|------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

Phase Programming Percentage

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|---|----------|----|-----|---------------------------------------|------|------------------------------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | N/A |
| EA Number: | | | | | | Not Applicable | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | | | | | Not Applicable | FMIS or TRAMS |
| Known Expenditures: | | | | | | | TrAMS |
| | | | | | | Estimated Project Completion Date: | 12/31/2028 |
| Completion Date Notes: | | | | | | | |
| Are federal funds being flex transferred to FTA? | | No | | If yes, expected FTA conversion code: | | N/A | |
| Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. | | | | | | | |

| Fiscal Constraint Consistency Review | |
|---|--|
| 1. What is the source of funding? FTA Section 5310 formula funding - UZA apportionment | |
| 2. Does the amendment include changes or updates to the project funding? Yes, minor 5310 update + overmatch added. | |
| 3. Was proof-of-funding documentation provided to verify the funding change? Yes, via the Finance Department. | |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? No ODOT approval was required. | |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes. | |

| Project Location References | | | | | |
|-----------------------------|-------------------|----------------|----------------|----------------|----------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Cross Streets | Route or Arterial | | Cross Street | | Cross Street |
| | Not Applicable | | Not Applicable | | Not Applicable |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|----------------|----------------|----------------|------------------------|----------------|---|----------------|
| 1st Year Programmed | 2026 | Years Active | 0 | Project Status | T22 | Programming actions in progress or programmed in current MTIP | |
| Total Prior Amendments | 0 | Last Amendment | Not Applicable | Date of Last Amendment | Not Applicable | Last MTIP Amend Num | Not Applicable |
| Last Amendment Action | Not Applicable | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|-------|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Notes |
| | X | | | | X | X | X |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Mass Transit - Operating assistance to transit agencies. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | ID# 12096 - TriMet Operations: Phase 1 |
| RTP Project Description: | Operations of transit services, such as drivers, security, facilities and rolling stock. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|--|
| Yes/No | Network | Designation |
| No | Motor Vehicle | Not Applicable. Key 23189 represents a 5310 funding project grouping bucket (PGB) ↓ |
| No | Transit | |
| No | Freight | |
| No | Bicycle | |
| No | Pedestrian | |

| National Highway System and Functional Classification Designations | | | |
|--|-----|----------------|----------------|
| System | Y/N | Route | Designation |
| NHS Project | No | Not Applicable | Not Applicable |
| Functional Classification | No | Not Applicable | Not Applicable |
| Federal Aid Eligible Facility | No | Not Applicable | Not Applicable |

Additional RTP Consistency Check Areas

- 1. Is the project designated as a Transportation Control Measure? **No.**
- 2. Is the project identified on the Congestion Management Process (CMP) plan? **No.**
- 3. Is the project included as part of the approved: UPWP? **No.**
- 3a. If yes, is an amendment required to the UPWP? **No.**
- 3b. Can the project MTIP amendment proceed before the UPWP amendment? **Yes.**
- 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? **Not applicable.**
- 4. Applicable RTP Goal:
 - Goal # 1 - Mobility Options:**
 - Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.
 - Objective 1.3 - Access to Transit: Increase household and job access to current and planned frequent transit service.
 - Goal 2 - Safe System:**
 - Object 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035
 - Goal #3 - Equitable Transportation:**
 - Object 3.1 - Transportation Equity: Eliminate disparities related to access, safety, affordability and health outcomes experienced by people of color and other marginalized communities.
 - Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs.
- 5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? **No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.**

Public Notification/Opportunity to Comment Consistency Requirement

- 1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
- 2. What are the start and end dates for the comment period? **Estimated to be January 30, 2024 to February 28, 2024**
- 3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
- 4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
- 5. Did the project amendment result in a significant number of comments? **Not expected.**
- 6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Not expected.**

Fund Codes References

| | |
|--------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| 5310 | Federal FTA Section 5310 funds that improve mobility for seniors and individuals with disabilities by removing barriers to transportation service and expanding transportation mobility options. This program supports transportation services planned, designed, and carried out to meet the special transportation needs of seniors and individuals with disabilities |
| 5310 (80/20) | Appropriated federal FTA Section 5310 funds which require a minimum match requirement of 20%. The federal share can't exceed 80% |
| 5310 (50/50) | Appropriated federal FTA Section 5310 funds which require a minimum match requirement of 50%. The federal share can't exceed 50% |
| Other | General local funds committed to the project above and beyond the required minimum match. Also referred to as "overmatch" funds. |

| | | | | | | | | |
|--------------|--|----------------|-----------------|-------------------------|--------------|--------------|--------------|--------------|
| 23189 | Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2026 | 2026 | 5310 (80/20) | \$ 1,891,421 | \$ 2,081,321 | 520,330 | \$ 1,560,991 | \$ 4,162,642 |
| | | 2026 | 5310 (50/50) | \$ 316,500 | \$ 316,500 | \$ 316,500 | \$ - | \$ 633,000 |
| | | Totals: | | | \$ 2,207,921 | \$ 2,397,821 | \$ 836,830 | \$ 1,560,991 |



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment
ADD FUNDS
 Adjust 5310 formula funds and
 add local overmatch

Project #7

| Project Details Summary | | | | | | | |
|-------------------------|-------|-------------|-----|--------------------|-------|----------------------------|------------|
| ODOT Key # | 23203 | RFFA ID: | N/A | RTP ID: | 12096 | RTP Approval Date: | 11/30/2023 |
| MTIP ID: | 71319 | CDS ID: | N/A | Bridge #: | N/A | FTA Flex & Conversion Code | No |
| MTIP Amendment ID: | | FB24-05-FEB | | STIP Amendment ID: | | TBD | |

Summary of Amendment Changes Occurring: The formal amendment adjusts the estimate 5310 appropriation that will occur and adds local overmatch to better reflect the total cost of the project. Adding the local overmatch results in a cost change of \$1,852,316 or a 60% increase to the project. The increase is well above the 30% threshold for completing cost changes administratively.

| | | | | | | | |
|----------------------------|---|--------------------------------|--------|--|-------------------------------|------------|--|
| Project Name: | Enhanced Seniors Mobility/ Individuals w/Disabilities (2027) | | | | | | |
| Lead Agency: | TriMet | Applicant: | TriMet | | Administrator: | FTA | |
| Certified Agency Delivery: | No | Non-Certified Agency Delivery: | No | | Delivery as Direct Recipient: | Yes | |

Short Description:
 Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2027.

MTIP Detailed Description (Internal Metro use only):
 Section 5310 funding supports elderly and persons with disability services (capital and operating expenses). Funds mobility management activities, purchase of services, operating, and preventive maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area. Funds will be passed through to Ride Connection and used for TriMet’s LIFT Paratransit services (5310 FFY 2027 allocation via UZA apportionment)

STIP Description:
 Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland urbanized area in federal fiscal year 2027.

| Project Classification Details | | | |
|--------------------------------|--------------------|----------|---|
| Project Type | Category | Features | System Investment Type |
| Transit | Transit Operations | | Systems Management, ITS, and Operations |
| ODOT Work Type: | TRANSIT | | |

Phase Funding and Programming

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation (UR) | Construction (Cons) | Other | Total |
|-------------------------|-----------------|-----------------|----------|------------------------------|--------------------|-------------------------|---------------------|-------------------------|--------------|
| Federal Funds | | | | | | | | | |
| 5310 (80/20) | 5310 | 2027 | | | | | | \$ 1,948,163 | \$ - |
| 5310 (80/20) | 5310 | 2027 | | | | | | \$ 2,143,760 | \$ 2,143,760 |
| 5310 (505/50) | 5310 | 2027 | | | | | | \$ 325,995 | \$ 325,995 |
| Federal Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,469,755 | \$ 2,469,755 |

State Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|----------------------|-----------|------|----------|------------------------------|--------------------|--------------------|--------------|-------|-------|
| | | | | | | | | | \$ - |
| State Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |

Local Funds

| Fund Type | Fund Code | Year | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|--------------------------|------------------|-----------------|----------|------------------------------|--------------------|--------------------|--------------|-----------------------|--------------|
| Local (80/20) | Match | 2027 | | | | | | \$ 487,041 | \$ - |
| Local (80/20) | Match | 2027 | | | | | | \$ 535,940 | \$ 535,940 |
| Local (50/50) | Match | 2027 | | | | | | \$ 325,995 | \$ 325,995 |
| Other | OTH0 | 2027 | | | | | | \$ 1,607,820 | \$ 1,607,820 |
| Local Totals: | | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,469,755 | \$ 2,469,755 |

| Phase Totals | Planning | PE | ROW | UR | Cons | Other | Total |
|------------------------------|----------|------|------|------|------|-------------------------|-------------------------|
| Existing Programming Totals: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 3,087,194 | \$ 3,087,194 |
| Amended Programming Totals | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 4,939,510 | \$ 4,939,510 |

Total Estimated Project Cost \$ 4,939,510
Total Cost in Year of Expenditure: \$ 4,939,510

| Programming Summary | Yes/No | Reason if short Programmed | | | | | |
|----------------------------------|----------|-------------------------------------|------|------|------|--------------|--------------|
| Is the project short programmed? | No | The project is not short programmed | | | | | |
| Programming Adjustments Details | Planning | PE | ROW | UR | Cons | Other | Totals |
| Phase Programming Change: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 1,852,316 | \$ 1,852,316 |
| Phase Change Percent: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 60.0% | 60.0% |
| Amended Phase Matching Funds: | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 861,935 | \$ 861,935 |
| Amended Phase Matching Percent: | N/A | N/A | N/A | N/A | N/A | 17.45% | 17.45% |

Note: The 5310 contributions have different minimum matching requirement: One is 20% and the other is 50%. With the overmatch TriMet's total match is 50%.

Phase Programming Summary Totals

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------------|--------------|
| Federal | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,469,755 | \$ 2,469,755 |
| State | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Local | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 2,469,755 | \$ 2,469,755 |
| Total | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 4,939,510 | \$ 4,939,510 |

Phase Composition Percentages

| Fund Type | Planning | PE | ROW | UR | Cons | Other | Total |
|-----------|----------|------|------|------|------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

Phase Programming Percentage

| Fund Category | Planning | Preliminary Engineering (PE) | Right of Way (ROW) | Utility Relocation | Construction | Other | Total |
|---------------|----------|------------------------------|--------------------|--------------------|--------------|--------|--------|
| Federal | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| State | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Local | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% |
| Total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 100.0% |

| Project Phase Obligation History | | | | | | | |
|---|----------|----|-----|---------------------------------------|------|------------------------------------|---------------|
| Item | Planning | PE | ROW | UR | Cons | Other | Federal |
| Total Funds Obligated | | | | | | | Aid ID |
| Federal Funds Obligated: | | | | | | | N/A |
| EA Number: | | | | | | Not Applicable | FHWA or FTA |
| Initial Obligation Date: | | | | | | | FTA |
| EA End Date: | | | | | | Not Applicable | FMIS or TRAMS |
| Known Expenditures: | | | | | | | TrAMS |
| | | | | | | Estimated Project Completion Date: | 12/31/2028 |
| Completion Date Notes: | | | | | | | |
| Are federal funds being flex transferred to FTA? | | No | | If yes, expected FTA conversion code: | | N/A | |
| Notes: Expenditure Authorization (EA) information pertains primarily to projects under ODOT Local Delivery oversight. | | | | | | | |

| Fiscal Constraint Consistency Review |
|--|
| 1. What is the source of funding? FTA Section 5310 formula funding - UZA apportionment |
| 2. Does the amendment include changes or updates to the project funding? Yes, minor 5310 adjustments are included along with local overmatch added to reflect the total project at a 50-50% federal to local ratio. |
| 3. Was proof-of-funding documentation provided to verify the funding change? Yes, via Finance Department confirmation |
| 4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? No ODOT approval was required. |
| 5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes. |

| Project Location References | | | | | |
|-----------------------------|-------------------|----------------|----------------|----------------|----------------|
| On State Highway | Yes/No | Route | MP Begin | MP End | Length |
| | No | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Cross Streets | Route or Arterial | | Cross Street | | Cross Street |
| | Not Applicable | | Not Applicable | | Not Applicable |

| Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification | | | | | | | |
|---|----------------|----------------|----------------|------------------------|----------------|---|----------------|
| 1st Year Programmed | 2026 | Years Active | 0 | Project Status | T22 | Programming actions in progress or programmed in current MTIP | |
| Total Prior Amendments | 0 | Last Amendment | Not Applicable | Date of Last Amendment | Not Applicable | Last MTIP Amend Num | Not Applicable |
| Last Amendment Action | Not Applicable | | | | | | |

| Anticipated Required Performance Measurements Monitoring | | | | | | | |
|--|-----------------------|--------------------------|---------------------|--------|----------------------|--------|-------|
| Metro RTP Performance Measurements | Congestion Mitigation | Climate Change Reduction | Economic Prosperity | Equity | Mobility Improvement | Safety | Notes |
| | X | | | | X | X | X |

| RTP Air Quality Conformity and Transportation Modeling Designations | |
|---|---|
| Is this a capacity enhancing or non-capacity enhancing project? | Non-capacity enhancing project |
| Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3? | Yes. The project is exempt per 40 CFR 93.126, Table 2 |
| Exemption Reference: | Mass Transit - Operating assistance to transit agencies. |
| Was an air analysis required as part of RTP inclusion? | No. Not Applicable |
| If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion? | No. Not applicable. The project is not capacity enhancing |
| RTP Constrained Project ID and Name: | ID# 12096 - TriMet Operations: Phase 1 |
| RTP Project Description: | Operations of transit services, such as drivers, security, facilities and rolling stock. |

| Project Location in the Metro Transportation Network | | |
|--|---------------|--|
| Yes/No | Network | Designation |
| No | Motor Vehicle | Not Applicable. Key 23189 represents a 5310 funding project grouping bucket (PGB) ↓ |
| No | Transit | |
| No | Freight | |
| No | Bicycle | |
| No | Pedestrian | |

| National Highway System and Functional Classification Designations | | | |
|--|-----|----------------|----------------|
| System | Y/N | Route | Designation |
| NHS Project | No | Not Applicable | Not Applicable |
| Functional Classification | No | Not Applicable | Not Applicable |
| Federal Aid Eligible Facility | No | Not Applicable | Not Applicable |

Additional RTP Consistency Check Areas

1. Is the project designated as a Transportation Control Measure? **No.**
2. Is the project identified on the Congestion Management Process (CMP) plan? **No.**
3. Is the project included as part of the approved: UPWP? **No.**
- 3a. If yes, is an amendment required to the UPWP? **No.**
- 3b. Can the project MTIP amendment proceed before the UPWP amendment? **Yes.**
- 3c. What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? **Not applicable.**
4. Applicable RTP Goal:
 - Goal # 1 - Mobility Options:**
 Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.
 Objective 1.3 - Access to Transit: Increase household and job access to current and planned frequent transit service.
 - Goal 2 - Safe System:**
 Object 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035
 - Goal #3 - Equitable Transportation:**
 Object 3.1 - Transportation Equity: Eliminate disparities related to access, safety, affordability and health outcomes experienced by people of color and other marginalized communities.
 Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs.
5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? **No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.**

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be January 30, 2024 to February 28, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Not expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Not expected.**

Fund Codes References

| | |
|--------------|---|
| Local | General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds |
| 5310 | Federal FTA Section 5310 funds that improve mobility for seniors and individuals with disabilities by removing barriers to transportation service and expanding transportation mobility options. This program supports transportation services planned, designed, and carried out to meet the special transportation needs of seniors and individuals with disabilities |
| 5310 (80/20) | Appropriated federal FTA Section 5310 funds which require a minimum match requirement of 20%. The federal share can't exceed 80% |
| 5310 (50/50) | Appropriated federal FTA Section 5310 funds which require a minimum match requirement of 50%. The federal share can't exceed 50% |
| Other | General local funds committed to the project above and beyond the required minimum match. Also referred to as "overmatch" funds. |

| | | | | | | | | | | | |
|-------|-------|--------|--|--|----------------|--------------|-------------------------|--------------|------------|--------------|--------------|
| 23203 | 71319 | TriMet | Enhanced Seniors Mobility/ Individuals w/Disabilities (2027) | Supports mobility management activities purchase of services operating and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2027 | 2027 | 5310 (80/20) | \$ 1,948,163 | \$ 2,143,760 | \$ 535,940 | \$ 1,607,820 | \$ 4,287,520 |
| | | | | | 2027 | 5310 (50/50) | \$ 325,995 | \$ 325,995 | \$ 325,995 | \$ - | \$ 651,990 |
| | | | | | Totals: | | \$ 2,274,158 | \$ 2,469,755 | \$ 861,935 | \$ 1,607,820 | \$ 4,939,510 |



Memo

Date: January 24, 2024
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: February 2024 MTIP Formal Amendment & Resolution 24-53XX Approval Request

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

FOR THE PURPOSE OF ADDING OR AMENDING SEVEN PROJECTS IN THE 2024-27 MTIP TO MEET FEDERAL TRANSPORTATION PROJECT DELIVERY REQUIREMENTS

BACKGROUND

What This Is - Amendment Summary:

The February 2024 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle adds or amends a total of seven projects. There are three new projects being added to the MTIP and four existing projects being amended. Three of the projects belong to ODOT with the remaining four impacting TriMet.

What is the requested action?

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 24-53XX to add and amend the seven projects to the 2024-27 MTIP.

A summary of the project changes occurring as part of the January 2024 Formal Amendment bundle include the following:

- **Key 22551 - US26: SE Powell Blvd & SE 36th Ave:**
 - Lead Agency: ODOT
 - Description: Design and construct a Rectangular Rapid Flashing Beacon (RRFB) traffic signal to increase pedestrian safety. This location was part of the ODOT Inner Powell Road Safety Audit determining location will merit by adding traffic signal at location.
 - Action: Cost Increase. The Design Acceptability Process (DAP) resulted in updated PE, ROW, and Construction phase costs resulting in a \$792k funding gap for the project. State HB2017 funds have been approved to fill the funding gap. The cost increase exceeds the 50% threshold for projects under \$1 million dollars. This triggers the need for a formal amendment.

- **Key 22322 - Oregon Transportation Network - TriMet FFY23:**
 - Lead Agency: ODOT
 - Description: Urbanized public transit capital funding for Federal fiscal year 2023. Funds will be transferred to FTA for delivery. Projects and programs to be determined based on funding requirements.
 - Action: Cost Decrease. Per direction from the ODOT Public Transit Division, the authorized funding for this project grouping bucket is being reduced. The project as programmed functions as a project grouping bucket (PGB). The final selected projects from this PGB will then be split off and programmed separately as required.

- **Key 23541 - Oregon Transportation Network - Ride Connection:**
 - Lead Agency: ODOT
 - Description: Urbanized public transit capital funding project grouping bucket (PGB) to be used for gas bus and van replacement, as well as preventative maintenance and mobility management for federal fiscal year 2023.
 - Action: Add New Project. The project is a new PGB from the ODOT Public Transit Division. The PGB appears will support later eligible elderly/disabled rideshare type projects that will be split off the PGB and programmed separately.

- **Key New - TriMet Line 33 Traffic Signal Priority Upgrade:**
 - Lead Agency: TriMet
 - Description: Design and implement the next generation transit signal priority (TSP) upgrade along TriMet's Line 33 to improve reliability of transit service
 - Action: Add New Project. This is a new project for TriMet from Metro's Carbon Reduction Program. The Carbon award is \$4 million dollars. TriMet will provide the required 10,27% match. The project will provide TSP upgrades along Line 33 in the southeast Metro region to help improve transit service delivery.

- **Key 23580 - 82nd Ave Bus Rapid Transit Project Development: PDX - Sunnyside Ave:**
 - Lead Agency: TriMet
 - Description: Complete project development activities in support of the planned new 82nd Ave BRT including preliminary design, addressing NEPA requirements, development of FTA rating materials and other activities needed to obtain a Small Starts grant
 - Action - Add New Project:
 - TriMet will complete various project development actions up through NEPA completion and final design as they move forward to secure a FTA Capital Improvement Program Small Starts Grant.
 - There are two project development projects being programmed supporting the 82nd Ave BRT project. There is this one and Metro's project development version.

- FTA has approved the “two-project development” approach to complete project development activities under FTA guidelines.
 - Assuming TriMet is successful in securing the Small Starts grant FTA, the Small Starts grant would be applied to the Construction phase.
 - The total estimated project development cost is about \$30 million. Metro’s portion contains nearly \$11 million with TriMet’s project containing the remaining \$19 million.
 - The total estimated project cost is \$300 million.
 - Metro’s project version is included in the January 2024 Formal Amendment bundle with TriMet’s project moving forward with the February Amendment bundle.
 - The goal is to have both projects in the approved MTIP and STIP by early April. This will allow FTA to consider the funds committed and the pre-award authorization clock to be established.
- **Key 23189 – Enhanced Seniors Mobility/Individuals w/Disabilities (2026):**
 - Lead Agency: TriMet
 - Description: Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2026
 - Action - Add Funds: The formal amendment adjusts the estimated formula 5310 allocation and adds local overmatch to the project. Including the local overmatch results in the net cost change being above the 30% threshold for administrative cost changes.
 - **Key 23204 - Enhanced Seniors Mobility/ Individuals w/Disabilities (2027):**
 - Lead Agency: TriMet
 - Description: Supports mobility management activities, purchase of services, operating, and preventative maintenance on vehicles for services focused on the elderly and persons with disabilities within the Portland Urbanized Area in FFY 2027
 - Action - Add Funds: The formal amendment adjusts the estimated formula 5310 allocation and adds local overmatch to the project. Including the local overmatch results in the net cost change being above the 30% threshold for administrative cost changes

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. They primarily are designed to ensure the MTIP is fiscally constrained, consistent with the approved RTP, and provides transparency in their updates, changes, and/or implementation. The programming factors include ensuring that the project amendments:

- Are eligible and required to be programmed in the MTIP.
- Properly demonstrate and fiscal constraint as a result of the required changes.
- Pass the RTP consistency review which requires a confirmation that the project(s) are identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket.
- Are consistent with RTP project costs when compared with programming amounts in the MTIP.
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and has completed required air conformity analysis and transportation demand modeling.
- Supports RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP.
- Contains applicable project scope elements that can be applied to Metro’s performance requirements.
- Verified to be part of the Metro’s annual Unified Planning Work Program (UPWP) for planning projects that may not be specifically identified in the RTP.
- Verified that the project location is part of the Metro regional transportation network, and is considered regionally significant, or required to be programmed in the MTIP per USDOT direction.
- Verified that the project and lead agency are eligible to receive, obligate, and expend federal funds.
- Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
- Reviewed and evaluated to determine if Performance Measurements will or will not apply.
- Successfully complete the required 30-day Public Notification/Opportunity to Comment period.
- Meets other MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the February FFY 2024 Formal MTIP amendment (JA24-05-FEB) will include the following:

| <u>Action</u> | <u>Target Date</u> |
|---|-------------------------|
| • TPAC Agenda mail-out..... | January 26, 2024 |
| • Initiate the required 30-day public notification process..... | January 30, 2024 |
| • TPAC notification and approval recommendation..... | February 2, 2024 |
| • JPACT approval and recommendation to Council..... | February 15, 2024 |
| • Completion of public notification process..... | February 2, 2024 |
| • Metro Council approval..... | March 7, 2024 |

Notes:

- * The above dates are estimates. JPACT and Council meeting dates could change.
- ** If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

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

| <u>Action</u> | <u>Target Date</u> |
|---|--------------------------|
| • Final amendment package submission to ODOT & USDOT..... | March 14 ,2024 |
| • USDOT clarification and final amendment approval..... | Early to mid- April 2024 |

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:**
 - a. Amends the 2024-27 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 20-5335 on July 20, 2023 (FOR THE PURPOSE OF ADOPTING THE 2024-2027 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA)
 - b. Oregon Governor approval of the 2021-24 MTIP on September 13, 2023.
 - c. 2024-2027 Statewide Transportation Improvement Program (STIP) Approval and 2024 Federal Planning Finding on September 25, 2023.
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds or obtain the next required federal approval step as part of the federal transportation delivery process.
4. **Metro Budget Impacts:** There are no direct or indirect impacts to the approved Metro budget through the actions of this amendment.

RECOMMENDED ACTION:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 24-53XX to add and amend the seven projects to the 2024-27 MTIP.

No Attachments.

Memo

Date: January 26, 2024
To: Transportation Policy Alternatives Committee (TPAC) and interested parties
From: John Mermin, Metro and Carol Chang, Regional Disaster Preparedness Organization (RDPO)
Subject: Overview of Regional Emergency Transportation Routes (RETR) Phase 2 project

PURPOSE

The purpose of this memorandum is to provide an overview of the upcoming Regional Emergency Transportation Routes (RETR) Phase 2 project and ask TPAC to send in names for candidates to serve on the project's quarterly work group.

ACTION REQUESTED

- Spread the word about the project to relevant staff that you work with, e.g. share this memo and/or the Powerpoint slides shared at the February 2 TPAC meeting
- Send names of potential candidates to serve on the project's quarterly work group to John Mermin john.mermin@oregonmetro.gov

BACKGROUND

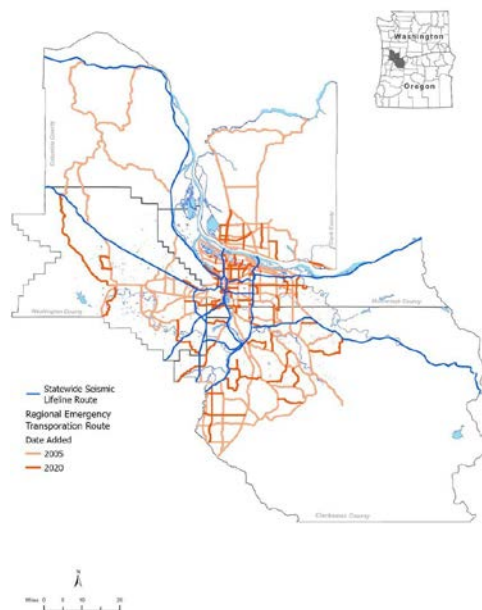
Disasters, both natural and man-made, can happen anytime, and the transportation system needs to be prepared to withstand them and to facilitate lifesaving and life-sustaining activities, including transporting first responders (e.g. police, fire and emergency medical services), fuel, essential supplies and patients.

The purpose of this project is to prioritize and tier the designated Regional Emergency Transportation Routes (RETRs) for the five-county Portland-Vancouver metropolitan region, which includes Clackamas, Columbia, Multnomah and Washington counties in Oregon and Clark County in Washington. See Figure 1. The project will also conduct desk research to investigate establishing regional operational guidelines for the owners and operators of designated RETRs.

First designated in 1996, RETRs¹ are priority routes targeted during an emergency for rapid damage assessment and debris-clearance and used to facilitate lifesaving and life-sustaining response activities. The RETRs were originally established in a memorandum of understanding (MOU) between the Oregon Department of Transportation (ODOT), Washington State Department of Transportation (WSDOT), the Port of Portland, Clackamas, Columbia, Multnomah and Washington counties and the City of Portland in the Portland-Vancouver metropolitan region in 2006. That MOU outlines responsibility for the Regional Disaster Preparedness Organization (RDPO) Emergency Management work group – referred to as REMTEC – to coordinate an update of the RETRs on a five-year cycle. That update frequency was not upheld.

However, in 2019-2021, RDPO and Metro partnered on the first Phase of the RETR project that reassessed and updated the routes for the 5-county region. Phase 1 evaluated potential routes with

Figure 1. Regional Emergency Transportation Routes



a range of connectivity, resilience, and equity criteria to establish an agreed upon set of designated RETRs that connect Statewide Lifeline Routes in Oregon, local ETRs, and provide connectivity and access to state and regional critical facilities and essential destinations within and across the five-county region. The Regional ETR working group included a multi-disciplinary team of emergency management, transportation planning, and public works staff supporting the Phase 1 planning project, including development of recommendations for future work. With new technology, more recent data, new planning initiatives at the state and local level, and mapping that had greatly expanded our understanding of hazard risks in the region—particularly seismic, landslide, flood and fire risks—89 new routes totaling 305 miles were added to the network. At the end of Phase 1, the RETR network was made up of 1,204 miles over 195 routes connecting over 75% of state and regional critical infrastructure and essential facilities.

Phase 1 also included a set of follow-on work raised by the regional partners and stakeholders. This second planning phase will build on the previous work on RETRs by 1) developing a tiering methodology and prioritization framework and 2) exploring approaches to develop operational guidelines and implementation recommendations.

While RETRs are all hazard routes, the tiering and prioritization process could enable the region to designate which routes among the identified RETRs should be evaluated, cleared, and opened first, next, and last in a catastrophic scenario. The RETR Collaborative Project Team and other identified stakeholder groups will provide input about the tiering methodology and help define goals, objectives, and criteria to apply.

The research on operational guidelines should help the region understand best practices for establishing who is responsible to do what with the routes and their bridges (i.e. maintenance, infrastructure investments, operational decisions during an emergency). It will help address the following key questions: “What does it mean to be a regional ETR”? Are there specific maintenance standards? Are there investment priorities? How do regional ETR designations inform decisions during an emergency (i.e., wildfire evacuations, flooding, or seismic event)?”

This project can be informed by the results of the Oregon's statewide Regional Resiliency Assessment Program (RRAP) of critical infrastructure and transportation systems in Oregon, development of the social vulnerability tool for the five-county Portland-Vancouver region and fuel action planning. The results of these efforts were not available during the Phase 1 RETR project. This project will also be informed by the results of the UASI-funded transportation recovery project that partnered with Portland State University's Transportation Research and Education Center (TREC) and gathered stakeholder feedback about transportation recovery priorities and methodologies.

The project should be carefully coordinated with Metro's regional debris management plan priorities (e.g., clearing routes = debris removal). It may also draw from the 2023 update of the Regional Transportation Plan (RTP) at Metro and the SW Regional Transportation Committee (RTC) plan in SW Washington. In the 2023 RTP, Metro brought in the updated RETRs into its system maps in the policy chapter and strengthened resilience policy language. Given the significant seismic risks in the region, the results of the tiering process should help guide and inform on-going maintenance and capital investments to ensure top tier routes are increasingly becoming seismically resilient.

This project will not provide sufficient detail to prioritize bridge and roadway seismic retrofits on a given roadway. Additional engineering evaluations would be needed to determine the needs for bridge and roadway seismic retrofit projects. Future RETR planning phases could include

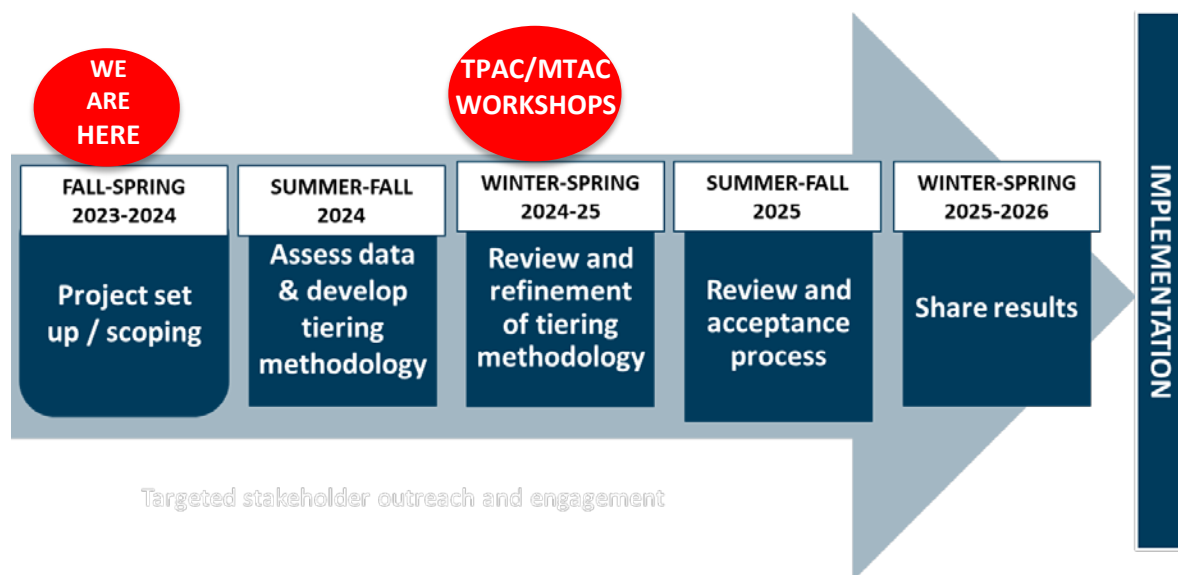
completion of a more in-depth vulnerability assessment of designated RETRs, identification of marine ETRs in the region, and evaluating bike and pedestrian options for emergency transportation.

This project was identified in the 2023 Regional Transportation Plan (RTP) implementation chapter (Chapter 8). Funding for the project is provided by the Urban Areas Security Initiative (UASI) program. Managed by the Department of Homeland Security (DHS) through the Federal Emergency Management Agency (FEMA), the UASI program makes funding available to enhance regional preparedness in major metropolitan areas throughout the United States and directly supports expanding regional collaboration to assist in the creation of regional systems for prevention, protection, response and recovery.

NEXT STEPS

Metro and RDPO are jointly kicking off the Regional Emergency Transportation Routes Phase 2 process. The timeline for the update is shown in Figure 2.

Figure 2. Draft timeline for tiering and prioritizing regional emergency transportation routes



The project team is in the process of developing a project website and will be hiring a consultant to help with the technical work this Spring. The project team is also in the process of forming a work group, made up of about 20 staff from agencies around the 5-county region, including transportation planners and emergency management professionals. To keep the size manageable, we are seeking one representative per agency to meet quarterly throughout the project. The representative would be responsible for coordinating with relevant staff at their agency.

As in Phase 1, this project will engage existing RDPO and Metro technical and policy committees and working groups as well as select briefings to county-level technical and policy coordinating committees to engage individual cities within each county in a coordinated manner. Upcoming briefings include:

- February 2 Transportation Policy Alternatives Committee (TPAC)
- March 30 Metro Technical Advisory Committee (MTAC)
- April 18 Joint Policy Advisory Committee on Transportation JPACT

Staff will engage and consult with transportation, emergency management and public works

departments of each county and the City of Portland (via the RDPO's working groups for these disciplines). Other agencies and groups will be engaged and consulted as key stakeholders due to their roles in emergency response and/or critical infrastructure and social services for vulnerable populations, including community-based organizations.

Staff will bring deliverables to TPAC, Joint Policy Advisory Committee on Transportation (JPACT), the Southwest Regional Transportation Council (SW RTC), the Metro Council, the RDPO Steering Committee and the RDPO Policy Committee for input at key milestones throughout the process. The RETR Phase 2 project will deliver a GIS-based tiering methodology for comparing different RETR segments, Best Practices research on RETR Management and Operational Guidance, an accompanying report for use by state, regional and local entities in planning for resiliency, recovery and emergency response, and an online viewer to share data layers and methodology.

Recommendations will be brought forward for review and consideration for endorsement by regional policymakers, including the RDPO Steering Committee, the RDPO Policy Committee, the Metro Council, JPACT and the SW RTC.

For questions about this topic, please contact John Mermin john.mermin@oregonmetro.gov or Carol Chang carol.chang@portlandoregon.gov

Memo

Date: Friday, January 26, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner
Ted Leybold, Resource Development Manager
Subject: 2027-2030 Metropolitan Transportation Improvement Program (MTIP) Revenue Forecast

Purpose

To provide TPAC an overview of the 2027-2030 MTIP revenue forecast.

Introduction and Background – Metropolitan Transportation Improvement Program (MTIP)

As part of Metro’s responsibilities as the metropolitan planning organization (MPO) for the Portland region, the agency is responsible for the development and administration of the Metropolitan Transportation Improvement Program (MTIP). The MTIP is the four-year, near-term capital improvement plan for the metropolitan region.¹ Within the MTIP document are:

- A list of the transportation investment priorities for the upcoming federal fiscal years;
- A description of the prioritization processes to allocate available funds to transportation projects and programs, and compliance of those processes with regional guidance and federal laws;
- A measurement of the performance of those investments and progress toward federal performance targets and regional goals;
- A demonstration of compliance with federal TIP-related regulations; and
- Instructions, which communicate the monitoring measures and procedures for administering the MTIP.

The MTIP is cooperatively developed by the MPO, state department of transportation, and transit agencies. Therefore, as part of the MTIP development process, key MTIP partners in the Portland region – ODOT (Region 1 and headquarters), TriMet, SMART, and Metro – work closely together to demonstrate how the region is working together to achieve the common goal of implementing the adopted Regional Transportation Plan (RTP) and comply with all applicable federal regulations to remain eligible for funding.

MTIP Revenue Forecast – Purpose

In the early phase of developing the 2027-2030 MTIP, a revenue forecast establishes a sense of the financial outlook for the upcoming four federal fiscal years. The revenue forecast is a snapshot estimate based on information known to that date related to federal and select state and local revenue streams.² The revenue outlook serves multiple purposes. These include:

- 1) Provide context in the anticipated federal and regionally significant state and local investment in the region’s transportation system over the next four federal fiscal years;

¹ The MTIP includes some maintenance and preservation-related investments, such as federal transportation monies restricted for the use pavement maintenance activities on the interstate system and transit bus replacement.

² Not all state and local revenue streams are reflected in the MTIP revenue forecast. State and local revenues which are mainly used for maintenance and preservation of the existing system are typically not reflected in the MTIP. However, in some circumstances those revenue streams are reflected because a portion of those funds are dedicated towards capital investments and/or dedicated toward a regionally significant facility.

- 2) Frame a discussion of the priorities and tradeoffs in the allocation of funds by different fund administrators, including MPOs, State DOTs, and transit agencies;
- 3) Help demonstrate fiscal constraint over the course of the next four fiscal years and show the region is not overspending beyond what is expected to be available and deliver in the MTIP;
- 4) Help to monitor project delivery, including the challenges to emerge in implementing the MTIP and expending of planned investments in a given year.

The snapshot of the near-term financial outlook provides a look across revenue estimates of federal and relevant state-local funds being administered by ODOT and transit agency partners (TriMet and SMART). The revenue outlook in the broader context plays a key role in discussing near-term transportation priorities, tradeoffs, and goals to be achieved for the regional system with limited investment. The revenue forecast is part of Metro’s responsibilities as a metropolitan planning organization and demonstrates the region meeting the necessary federal requirements related to MTIP development.

This forecast differs from the 2023 Regional Transportation Plan revenue forecast which accounts for “reasonably expected” revenues over a 20 year period and includes all sources of local revenues. Whereas the 2027-2030 MTIP revenue forecast is limited to a 4-year period and encompasses expected revenues and a limited amount of local revenues relevant to the regional transportation system.

2027-2030 MTIP Revenue Forecast – Process and Summary

In late 2023 through early 2024, Metro staff convened ODOT, TriMet, and SMART staff to develop the revenue forecast for the 2027-2030 MTIP. Based on the current information at the time, the four partner agencies developed a revenue estimate for the upcoming four federal fiscal years. These revenue forecasts are timely as they also inform the transit agencies annual budget process and the Oregon Transportation Commission’s allocation of forecasted revenues to ODOT’s various funding programs to set the foundation for the State Transportation Improvement Program (STIP) development.

At this time, revenues projected from tolling or any pricing programs are not included as part of the 2027-2030 MTIP revenue forecast for the initial draft. While there are clear indications a tolling program will be in operation come federal fiscal year 2027, Metro and ODOT continue to discuss the appropriate revenue estimate to include in the snapshot. Once Metro and ODOT come to an agreement on a revenue estimate for the four fiscal years, Metro will revise the 2027-2030 MTIP revenue forecast. Additionally, the status of other transportation revenue programs, such as congestion pricing and/or road user charge program (i.e., OReGO) remain early in development or the next steps undefined to determine an educated revenue estimate and therefore not included at this time. Lastly, the revenue estimate for federal discretionary funding does not include those anticipated ODOT led major projects (e.g., Interstate Bridge Replacement).

Attachments 1 and 2 provide an updated overview of the revenue forecast and the process to determine the estimate of transportation revenues anticipated for the region in federal fiscal years 2027 through 2030. The revenue estimates are summarized in total and by each agency with administrative responsibilities of distributing those revenues to transportation projects and programs: Metro, ODOT, SMART, and TriMet. Attachment 1 provides a simplified summary of the revenue forecast for federal fiscal years 2027 through 2030 and outlines a handful of key assumptions and factors that drive the revenue forecast. Attachment 2 is the draft 2027-2030 MTIP

revenue forecast report, which provides further detail, such as the breakdown of forecasted revenues by the source revenue program and by the administering agency’s funding allocation programs. This is done by fiscal year and in summarized totals. In total, the estimated total revenue of known available federal and relevant state funds to date is approximately \$1.1 billion for federal fiscal years 2027-2030.³ ***The 2027-2030 MTIP forecast remains an estimate of revenues to be available based on several assumptions pertaining to revenue availability.*** Factors such as the limitation rates for each year of the federal surface transportation reauthorization and estimates for state revenues dedicated for transportation (i.e., state gas tax, employer and employee tax for transit) shape the forecast of revenues and what is distributed by agency funding allocation programs. However, the forecast information helps to gauge the amount of revenue available, establishes an approximate budget, and facilitates an informed discussion around transportation investment priorities and tradeoffs.

Table 1. Summary of Portland Metropolitan Region Federal and State Revenue Forecast, FFY 2027 – 2030, in millions

| 2027 | 2028 | 2029 | 2030 | TOTAL |
|----------|----------|----------|----------|-------------------|
| \$119.17 | \$344.03 | \$348.34 | \$352.67 | \$1,164.21 |

Revenue estimates for the Portland metropolitan region will be further coordinated with partners throughout the development of the 2027-2030 MTIP. As transportation priorities get selected and programmed by project phase (e.g. planning, preliminary engineer/design, right-of-way, and construction) and assigned a funding type (e.g. STBG, HSIP, etc.), the MTIP will reference the early revenue forecast as the starting point for determining reasonably available revenues and demonstration of fiscal constraint - the balancing of project costs with anticipated revenue.

Next Steps

The following timeline illustrates the next steps for the 2027-2030 MTIP revenue forecast and subsequent funding allocation processes.

Timeline – 2027-2030 MTIP Revenue Forecast and Allocation of Funding Activities

| Activity | Timeframe |
|--|--------------------|
| 2024-2027 MTIP Revenue Forecast | |
| Transit agencies annual budget process | April and May 2024 |
| ODOT finalizes statewide revenue forecast update and allocation to funding programs | Early 2024 |
| TPAC presentation on the updated 2027-2030 MTIP revenue forecast | February 2, 2024 |
| Finalize the 2027-2030 MTIP revenue forecast for allocation purposes | Spring 2024 |
| Provide JPACT information on 2024-2027 MTIP revenue forecast | February 15, 2024 |
| Allocation Process of Federal Funds | |
| 2028-2030 ODOT funding program allocations (i.e., Fix-It, Bicycle-Pedestrian, Safe Routes to School, etc.) | 2024 – Fall 2025 |

³ Revenue forecasts are provided for federal fiscal years 2027 through 2030 for Metro, SMART, and TriMet. ODOT did not provide a revenue forecast for federal fiscal year 2027 because revenues were allocated in the 2024-2027 MTIP and STIP cycle. ODOT’s forecast represents new estimated revenues for three federal fiscal years.

| | |
|--|---|
| 2028-2030 Regional Flexible Funds | Summer 2024 – Summer 2025 |
| Transit agencies annual budget process | Annual; spring- summer 2024, 2025, 2026, 2027 |

Attachment 1 – Summary of Forecast of Federal and State Transportation Revenues Portland Metro Area Transportation Federal Fiscal Years 2027 through 2030 (in millions)

Table 1. Forecast of Federal and State Generated Transportation Revenues, Portland Metro Area Transportation Federal Fiscal Years (FFY) 2027 through 2030 (in millions)

| | FFY 2027 | FFY 2028 | FFY 2029 | FFY 2030 | FYs 2027-30 Total |
|---|------------------------------|---------------------|---------------------|---------------------|------------------------------|
| ODOT Directed ^{1, 3, 6} | N/A ^{4, 7} | \$149.83 | \$149.83 | \$149.83 | \$449.5 |
| State Trust Fund to Cities/Counties ⁴ | \$248.0 | \$248.22 | \$251.77 | \$257.56 | \$1,005.55 |
| Federal Discretionary ⁸ | N/A | \$20.0 | \$20.0 | \$20.0 | \$60.0 |
| Metro MPO 1, 2, 3, 5, 7 | \$3.86 | \$54.9 | \$54.9 | \$54.9 | \$168.7 |
| SMART | \$3.31 | \$3.50 | \$3.71 | \$3.94 | \$14.46 |
| TriMet | \$112.0 | \$115.8 | \$119.9 | \$124.0 | \$471.7 |
| Sub-Total (excludes federal discretionary and State Trust Fund to Cities/Counties) | \$119.17 | \$324.03 | \$328.34 | \$332.67 | \$1,104.21 |
| Sub-Total (includes federal discretionary, but excludes State Trust Fund to Cities/Counties) | \$119.17 | \$344.03 | \$348.34 | \$352.67 | \$1,164.21 |
| Sub-Total (includes federal discretionary and State Trust Fund to Cities/Counties) | \$367.17 | \$592.25 | \$600.11 | \$610.23 | \$2,169.76 |
| Tolling ⁹ | TBD and to be updated | | | | |
| Total (All listed revenues) | TBD and to be updated | | | | |

¹ Does not include federally dedicated planning funds, federal dollars for rural and small cities outside MPOs, or funds dedicated to ODOT Administrative costs.

² Utilizes MPO forecast method, which differs from ODOT forecast method for federal funding programs.

³ Metro and ODOT forecasted revenues for FFY 2027 have already been allocated. SMART and TriMet forecasted revenues are allocated on an annual basis through their budget processes.

⁴ Funds not typically reflected in the Metropolitan Transportation Improvement Program, unless funds are being used for capital projects deemed as regionally significant.

⁵ Total reflects combined revenue for federal fiscal years 2028 through 2030 and under allocated carryover estimated for 2027. See Table 2 for further detail.

⁶ Estimates for carryover revenues for FFY 2027 for ODOT funding programs are unavailable for the revenue forecast. Carryover estimates will be made available and used as part of revenue estimates for fiscally constraining the MTIP and the STIP.

⁷ Total includes revenues from the federal Carbon Reduction program.

⁸ Estimate is based on the Portland region to receive a proportion, based on population, of federal discretionary grant awards estimated for Oregon to receive. The estimate for Oregon is based on historical awards of discretionary funding from federal fiscal years 2021 through 2024 and a 25% reduction of discretionary funding available from Bipartisan Infrastructure Law levels. Funding is not guaranteed and would rely on project applications put forward competing well in the discretionary grant program. Estimate was not provided for federal fiscal year 2027. Anticipated federal discretionary awards for ODOT led major projects (e.g. Interstate Bridge Replacement) are not included in the estimate.

⁹ Metro and ODOT continue to discuss an appropriate revenue estimate for the operational toll program to include in the 2027-2030 MTIP revenue forecast. Once Metro and ODOT come to an agreement on a revenue estimate for the four fiscal years, Metro will revise the revenue forecast.

Summary

- Estimated \$1.1 billion will be invested into transportation projects and programs in the Portland metropolitan region in federal fiscal years 2027 through 2030.
- While federal transportation revenues are a key source for funding transportation projects and programs, state and local revenue sources comprise of a larger and more significant source of investment into the transportation system.¹

Key Assumptions

- All revenue forecasts use historical financial data and information from the current federal surface transportation authorization (i.e. Bipartisan Infrastructure Law) funding levels as starting points for projecting revenue forecasts.
- ODOT revenue forecast for federal fiscal years 2025-2027 assumes a ten percent (7.5%) reduction in transportation funding being available to allocate to transportation projects and programs.
- Transit agency revenue forecast does not include local revenues generated for the purpose of service and transit agency operations, such as passenger fares, advertising revenue, or employer tax.

¹ Consistent with findings on national research on surface transportation funding and financing.

- Revenue forecast estimate does not include local revenues generated by cities and counties, such as a local gas taxes, parking revenues, system development charges, or other user fees, used by local jurisdictions for operations, maintenance, or capital projects.
- ODOT's revenue forecast does include any potential federal discretionary grants and congressional directed spending the Portland region may receive for major capital projects. Estimate is based on the regional historical performance in discretionary grant programs applying a reduction on the estimate to reflect a likelihood of less discretionary revenues being available after the expiration of the Bipartisan Infrastructure Law. Transit revenue forecast does not include any potential federal discretionary grants. Only those federal discretionary grants which have been secured are reflected in the transit agency revenue forecasts.



2027-2030 Metropolitan Transportation Improvement Program (MTIP) Revenue Forecast

Initial Draft

State and Federal Unallocated Funds

February 2024

Public service

*We are here to serve the public
with the highest level of
integrity.*

Excellence

*We aspire to achieve exceptional
results*

Teamwork

*We engage others in ways that foster
respect and trust.*

Respect

*We encourage and appreciate
diversity in people and ideas.*

Innovation

*We take pride in coming up with
innovative solutions.*

Sustainability

*We are leaders in demonstrating
resource use and protection.*

Metro's values and purpose

We inspire, engage, teach and invite people to preserve and enhance the quality of life and the environment for current and future generations.

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance.

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Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at trimet.org.

Metro is the federally mandated metropolitan planning organization designated by the governor to develop an overall transportation plan and to allocate federal funds for the region.

The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council. The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds. JPACT serves as the MPO board for the region in a unique partnership that requires joint action with the Metro Council on all MPO decisions.

MTIP web site: oregonmetro.gov/mtip

The preparation of this report was financed in part by the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration. The opinions, findings and conclusions expressed in this report are not necessarily those of the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration

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INTRODUCTION

This report documents the cooperative development of the revenue forecast for the 2027-2030 Metropolitan Transportation Improvement Program (MTIP). It includes a description of the forecast methods and the process by which forecasted revenues were distributed to funding allocation programs administered by the four agencies with federal funding authority within the greater Portland metropolitan area that select transportation projects and programs to receive those funds. These agencies are:

- The Oregon Department of Transportation (ODOT)
- Metro
- The Tri-County Metropolitan Transportation District of Oregon (TriMet); and
- The South Metro Area Region Transportation (SMART)

The revenue forecast is only for transportation funding that will be programmed in the MTIP, which includes all federal transportation funds and state and local agency funds that will be used on regionally significant transportation projects and programs. Generally, regionally significant projects and programs are those that are located on the regional transportation system as defined in the Metro area Regional Transportation Plan (RTP) or implement a key transportation strategy from the RTP, such as transportation demand management. Therefore, state and local dollars that will be used to build projects and maintain the local street system are not included in the forecast.

In developing the revenue forecast for the 2027-2030 MTIP, each agency which carries a responsibility to administer federal transportation funding summarized the methodology for determining the estimated amount of revenue available for transportation projects and programs in federal fiscal years 2027 through 2030. Each agency also described, to the extent known, the process for how those agencies will allocate the funds to major categories. The revenue estimation process does not discuss the outcomes or the specific details of the allocation of the revenues to transportation projects and programs. Separate documentation is provided about the allocation process, project prioritization criteria, and allocation results.

Recognizing Metro and ODOT use three-year cycles for allocating transportation revenues to projects and programs, the revenue forecast for Metro and ODOT focuses on new revenues available for federal fiscal years 2028, 2029, and 2030. Metro also provides an estimate of unallocated carryover revenues anticipated for federal fiscal year 2027. These unallocated revenues represent a refined estimate of the anticipated federal revenues available, but had not previously been allocated to transportation projects and programs in the 2024-2027 MTIP. The transit agencies, SMART and TriMet, include estimates for each federal fiscal year (2027-2030) as both agencies conduct their programming of projects annually through their budget processes.

In developing the revenue forecast for the 2027-2030 MTIP, Metro led the coordination efforts by working with partners ODOT, SMART, and TriMet and utilizing information from concurrent revenue forecasting efforts, whether that was a budget process or a funding allocation discussion. Metro provided a template outlining a series of steps in describing the development of the revenue estimates. The template was developed in a manner which would be flexible to each agency and respecting the agency’s revenue forecasting processes, while also making the progression towards identifying the estimated revenues in the Portland metropolitan region. Key aspects each partner was expected to address as part of the revenue forecast included baseline starting points for revenue estimates, key assumptions related to the availability of revenues, revenue growth rates, assumed limitation rates, etc. Metro coordinated meetings with partner agency staff to review report drafts and forecast methods in preparation to produce this snapshot forecast of anticipated revenues to be invested in the region’s transportation system in federal fiscal years 2027 through 2030. The revenue forecast was initially developed over winter 2023 through spring 2024. The 2027-2030 MTIP revenue forecast was discussed at the Transportation Policy Alternatives Committee (TPAC) and provided to the Joint Policy Advisory Committee on Transportation (JPACT) in 2024.

Table 1. Forecast of Federal and State Generated Transportation Revenues, Portland Metro Area Transportation Federal Fiscal Years (FFY) 2027 through 2030 (in millions)

| | FFY 2027 | FFY 2028 | FFY 2029 | FFY 2030 | FYs 2027-30 Total |
|---|------------------------------|-----------------|-----------------|-----------------|-------------------|
| ODOT Directed ^{1, 3, 6} | N/A ^{4, 7} | \$149.83 | \$149.83 | \$149.83 | \$449.5 |
| State Trust Fund to Cities/Counties ⁴ | \$248.0 | \$248.22 | \$251.77 | \$257.56 | \$1,005.55 |
| Federal Discretionary ⁸ | N/A | \$20.0 | \$20.0 | \$20.0 | \$60.0 |
| Metro MPO ^{1, 2, 3, 5, 7} | \$3.86 | \$54.9 | \$54.9 | \$54.9 | \$168.7 |
| SMART | \$3.31 | \$3.50 | \$3.71 | \$3.94 | \$14.46 |
| TriMet | \$112.0 | \$115.8 | \$119.9 | \$124.0 | \$471.7 |
| Sub-Total (excludes federal discretionary and State Trust Fund to Cities/Counties) | \$119.17 | \$324.03 | \$328.34 | \$332.67 | \$1,104.21 |
| Sub-Total (includes federal discretionary, but excludes State Trust Fund to Cities/Counties) | \$119.17 | \$344.03 | \$348.34 | \$352.67 | \$1,164.21 |
| Sub-Total (includes federal discretionary and State Trust Fund to Cities/Counties) | \$367.17 | \$592.25 | \$600.11 | \$610.23 | \$2,169.76 |
| Tolling ⁹ | TBD and to be updated | | | | |
| Total (All listed revenues) | TBD and to be updated | | | | |

¹ Does not included federally dedicated planning funds, federal dollars for rural and small cities outside MPOs, or funds dedicated to ODOT Administrative costs.

² Utilizes MPO forecast method, which differs from ODOT forecast method for federal funding programs.

³ Metro and ODOT forecasted revenues for FFY 2027 have already been allocated. SMART and TriMet forecasted revenues are allocated on an annual basis through their budget processes.

⁴ Funds not typically reflected in the Metropolitan Transportation Improvement Program, unless funds are being used for capital projects deemed as regionally significant.

⁵ Total reflects combined revenue for federal fiscal years 2028 through 2030 and under allocated carryover estimated for 2027. See Table 2 for further detail.

⁶ Estimates for carryover revenues for FFY 2027 for ODOT funding programs are unavailable for the revenue forecast. Carryover estimates will be made available and used as part of revenue estimates for fiscally constraining the MTIP and the STIP.

⁷ Total includes revenues from the federal Carbon Reduction program.

⁸ Estimate is based on the Portland region to receive a proportion, based on population, of federal discretionary grant awards estimated for Oregon to receive. The estimate for Oregon is based on historical awards of discretionary funding from federal fiscal years 2021 through 2024 and a 25% reduction of discretionary funding available from Bipartisan Infrastructure Law levels. Funding is not guaranteed and would rely on project applications put forward competing well in the discretionary grant program. Estimate was not provided for federal fiscal year 2027. Anticipated federal discretionary awards for ODOT led major projects (e.g., Interstate Bridge Replacement) are not included in the estimate.

⁹ Metro and ODOT continue to discuss an appropriate revenue estimate for the operational toll program to include in the 2027-2030 MTIP revenue forecast. Once Metro and ODOT come to an agreement on a revenue estimate for the four fiscal years, Metro will revise the revenue forecast.

METRO REGIONAL FLEXIBLE FUNDS (RFF) REVENUE FORECAST

Metro's Regional Flexible Fund Allocation (RFFA) is a process that consolidates the distribution of three long-standing federal funding program sources to transportation projects and programs in the Metro region. One new federal funding program as a result of the Bipartisan Infrastructure Law (BIL) – also known as the Infrastructure Investment and Jobs Act (IIJA) – is also identified but kept separate from the Regional Flexible Fund because its long-term status remains to be determined with the next federal transportation reauthorization. The revenue forecast for the Regional Flexible Funds is coordinated with the Oregon Department of Transportation and Oregon's other Metropolitan Planning Organizations (MPOs).

Step 1: Developing the Statewide Metropolitan Area/Transportation Management Areas (TMA) Revenues Forecast (Fall 2023 – Spring 2024)

Federal Transportation Funding

The federal government provides revenues from federal fuels taxes and heavy truck taxes to states and local governments. Most federal funding is distributed to states, metropolitan planning organizations, and local governments by funding formulas, with the remainder allocated in competitive application-based programs.

Oregon receives over half a billion dollars (\$600 million) in funding from the Federal Highway Administration each year. However, with the passage of the Bipartisan Infrastructure Law (BIL) also known as the Infrastructure Investment and Jobs Act (IIJA), Oregon, like many other states, saw a significant increase for federal surface transportation funds for fiscal years 2022 through 2026. All federal highway funds flow through ODOT from individual federal funding programs, including new programs created through BIL, and each have their own rules regarding what types of projects are eligible for those funds and what match rates are required.

About one-third of those surface transportation funds which flow through ODOT are distributed to local governments either directly by formula (e.g., urban-STBG program funds) or by ODOT agreements (e.g., the sub-allocation of CMAQ funds to MPOs that have had federal air quality compliance violations and implementation plans to address them).

Developing Statewide Forecasts

The statewide forecast of federal funds available for transportation projects and programs during the time period of the 2027-2030 State and Metropolitan Transportation Improvement Programs (TIPs) is coordinated by the Statewide Investment Management Section of the ODOT and updated with new information and events. The forecast is shared with MPOs and Transit agencies in the state through the statewide TIP coordination committee.

Metro staff works with ODOT staff and other Oregon MPOs at the transportation improvement program (TIP) coordination committee to coordinate forecast methodology options for the federal funding programs provided to the Oregon TMA MPOs: Surface Transportation Block Grant (STBG) – including the Transportation Alternatives (TA)

Program set-aside, the Congestion Mitigation – Air Quality (CMAQ) funding program, and the Carbon Reduction Program, created by BIL. The Transportation Management Area (TMA) MPOs in Oregon are apportioned allocation authority over the following federal transportation funding programs:

- **Surface Transportation Block Grant (Urban):** The Surface Transportation Block Grant (STBG) Program provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.
- **Congestion Mitigation and Air Quality (CMAQ):** The Congestion Mitigation and Air Quality program provides a funding source to State and local governments for certain eligible transportation projects and programs to help meet the requirements of the Clean Air Act and local State Implementation Plans (SIPs). Funding is available to areas that do not meet the National Ambient Air Quality Standards for ozone, carbon monoxide, or particulate matter (referred to as nonattainment areas) and for former nonattainment areas. The goals of the program are to mitigate for congestion and improve air quality by reducing transportation emissions. The scope of a transportation project or program must fit within one or more of the identified project types which are recognized eligible by federal requirements of the program as well as any additional state requirements. These funds are sub-allocated to eligible areas by the Oregon Transportation Commission, which has adopted a statewide formula for this purpose. The Oregon Transportation Commission has also adopted additional state priorities and program guidance for use of CMAQ funds in Oregon.
- **Transportation Alternatives (set-aside from Surface Transportation Block Grant):** The Bipartisan Infrastructure Law continues the Transportation Alternatives set aside from program the Surface Transportation Block Grant, which the previous authorizations had eliminated the predecessor Transportation Alternatives Program (TAP) and replaced it with a set-aside of Surface Transportation Block Grant (STBG) program funding for transportation alternatives (TA). These set-aside funds are flexible to include all projects and activities that were previously eligible under the old TAP funding program. This encompasses a variety of smaller-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to storm water and habitat connectivity. The BIL also increased the set aside amount to 59% to be sub-allocated by population.
- **Carbon Reduction Program:** The Bipartisan Infrastructure Law created the Carbon Reduction Program to fund transportation activities focused on reducing greenhouse gas emissions from transportation sources. Eligible projects may include public transit and active transportation; streetlight and traffic control

device energy efficiency; tolling, pricing and transportation demand management that shift travel to cleaner modes; freight and port projects; alternative fuels; and congestion management technologies. Additionally, state departments of transportation (DOT), in consultation with MPOs, are required to develop and update at least every four years a carbon reduction strategy and submit it to U.S. DOT for approval. U.S. DOT must certify that a State's strategy meets the statutory requirements.

Translating Statewide Federal Transportation Forecasts to Urban Areas

ODOT staff provided the TIP coordination committee historical data of revenues for each MPO for use in developing the revenue forecast for their MPO.¹ This information was also provided knowing that the most recent transportation authorization sharply increased federal transportation funds and the likelihood of sustaining such levels may not be possible. ODOT staff also offered the TIP coordination committee the ability to provide revenue forecasts with different assumptions pertaining to long-term existing of funding programs or less conservative reductions of a new federal transportation reauthorization to help form a set of scenarios to then inform the revenue forecasts for urbanized areas.

The TIP coordination committee nor ODOT staff require MPOs to agree and apply a specific revenue forecasting methodology, leaving the discretion to each MPO. Each MPO decides the way in which to forecast funding for the purpose of allocating forecasted funding to projects. However, for TIP programming, the MPOs are limited in how much funding they can program to project costs in each fiscal year by the amount of committed or reasonably expected revenue to projects within each MPO. Methods for determining committed and reasonably expected revenue for financially constraining the TIP will continue to be coordinated with the statewide committee.²

Step 2: Forecasting the Revenue Allocation Authority to Metro and the Regional Flexible Funds (Late 2023 to Spring 2024)

While the work of the TIP committee significantly influences the revenue forecast of MPOs throughout Oregon, the Portland metropolitan region also considers and emphasizes several other factors in developing an appropriate method for forecasting available funding for the allocation of Regional Flexible Funds. These factors include: 1) consideration of federal processes which determine the amount of federal transportation funds distributed to states and MPOs for transportation projects; 2) project readiness and delivery

¹ Historical data on revenues sub allocated to MPOs was not provided for the new Carbon Reduction funding program.

² While the TIP coordinators committee and ODOT do not specify a particular forecast of revenues for the purpose of allocating funding to projects, the TIP coordinators committee and ODOT will continue to meet throughout the development of the 2027-2030 MTIPs and STIP to coordinate the revenue forecast which will be used to financially constrain the MTIPs and STIP. The initial financial constraint forecast for the 2027-30 TIP financial constraint purposes is expected to take place in autumn/winter 2022-2023 with updated financial information. Revenue information used to financially constrain the TIP to committed and reasonably available funding is continually updated through the life of the TIP to reflect most up to date revenue data. When the TIP is adopted or amended, financial constraint utilizing the most current revenue and project cost data is utilized.

considerations and the federal aid process; 3) management of obligating federal funds in a timely manner; and 4) administration considerations of the RFFA allocation process.

The first factor is the federal process that makes funds available for projects and highly influences the revenue forecast. Every five to six years, federal authorization legislation is passed that sets the budget authority for federal transportation funding, including Regional Flexible Funds. After authorization, each year funds are apportioned based on actual transportation revenues generated, up to the amounts previously authorized. In recent history, apportionment of funds typically generates about 88-95% of authorized amounts. The percent of apportionment to authorization is known as the limitation rate.

Surface Transportation Block Grant (STBG) funds and the Transportation Alternatives set-aside are allocated to Transportation Management Area (TMA) metropolitan planning organizations (MPOs) based on formulas outlined by federal statutes. Metro receives approximately 75% of STBG funding made available to large MPOs in Oregon. In addition to federal formula allocation of STBG, Oregon also receives a state allocation of Congestion Mitigation and Air Quality (CMAQ) funds based on the U.S. Environmental Protection Agency (EPA) air quality designations. Oregon employs a statewide formula allocation for CMAQ funding to the eligible areas. The CMAQ statewide formula allocation was recently updated in 2017 and the allocation applies to CMAQ funds through 2024. ODOT and participating CMAQ agencies agreed in 2022 to continue with the existing formula, updated with current program status and data used for inputs in calculating the formula (e.g., population and requirements to implement the state Employee Commute Options rule) through 2030. Metro as the largest eligible MPO to receive CMAQ funds, receives approximately 73% of the CMAQ funds available to eligible Oregon MPO areas.

The second factor for the revenue forecast is the potential readiness for the use of forecasted funds and the local project delivery process of federal transportation funds. Upon award of funds, a local agency coordinates with ODOT and Metro to define a detailed scope of work, budget and schedule that address state and federal requirements (e.g. National Environmental Protection Act (NEPA) process requirements, design requirements) and execute an intergovernmental agreement to document how the project will meet requirements and provide required match funding. The process of executing the agreement typically takes a year or longer due to the number of details needing to be defined in meeting federal requirements. Implementing the agreement through the project phases of planning, preliminary engineering, right of way acquisition, and construction can take up to an additional four to five years. Recognizing the federal aid process and potential readiness of a transportation project awarded funding can impact the amount of forecasted revenues available year-by-year, the history of readiness of previous projects and complexity of federal aid processes influences whether Metro takes a conservative or aggressive approach to the revenue forecast for allocation purposes.

The third factor is the ODOT and MPO partnership on fund management of federal transportation funds. Each state must contractually obligate all federal transportation funding apportioned to it each federal fiscal year or the unobligated funds will be redistributed to states that have obligated all their funds. As ODOT has better capability to obligate federal transportation funds quickly on projects or programs, the agency takes on

the responsibility to ensure all federal transportation funding authority is obligated, including unobligated MPO funding authority. When ODOT obligates MPO unobligated funding authority, ODOT then provides equivalent funding authority in a future year. This provides flexibility to MPOs and keeps Oregon eligible for redistribution funds from other state's unobligated funding authority. Since 2019 ODOT and the large MPOs entered an agreement for MPOs to meet obligation rates in exchange for the ability to share in a portion of the redistribution funds ODOT receives annually. The management and obligation of federal transportation funds allocated by MPOs opened a new opportunity for potential increased revenue available to include in forecast. The enactment of the agreement resulted in small bumps of additional revenues in federal fiscal years 2022 through 2024. The consistency in the Portland region meeting the obligation rates provides a foundation in assuming a small amount of redistribution revenues will emerge from obligation performance.

The fourth and last additional factor incorporated into Metro's revenue forecast is the administrative consideration and impact of the 3-year allocation cycle. Through the RFFA process, Metro undertakes a significant administrative effort to run a deliberative and transparent funding allocation process based on the policy objectives and strategy for implementing the region's long-range transportation plan. This process is designed as a thoughtful effort of weighing tradeoffs and advancing progress towards the region's goals for the transportation system. As a result, the RFFA process is not nimble and does not adapt well to quickly allocate additional revenues not previously forecasted. Therefore, a less conservative forecast is appropriate so that a large amount of additional revenue does not go unallocated and unobligated.

In summary, forecasting and estimating the revenue for the Regional Flexible Funds allocation process has additional unique objectives from other funding allocation programs in the 2027-2030 MTIP.

With these factors in mind, the goals of estimating the revenue allocation authority are created to achieve the following objectives:

- Select enough projects that prepares an adequate pipeline to be ready to obligate funding as it becomes available each year to achieve the following:
 - deliver project benefits to the region as soon as possible
 - minimize loss of purchasing power to inflation
 - help ODOT (and subsequently the region) be eligible for federal redistribution funds
 - prevent having to undertake any supplemental allocation processes to distribute available funding that is in excess of earlier forecasts
- Provide a steady flow of funding to projects and programs to avoid shocks to the delivery systems.

- Balance forecasting enough revenues to develop projects in the delivery pipeline to maximize obligation of all funds as they become available without creating an over expectation of projects that can be delivered or excessive conflicts between projects for access to funds as they become available.

Revenue Forecast Methods and Assumptions

In prior RFFA cycles, forecast amounts would be based on funding authorization levels, with an assumed limitation rate based on historic performance. If the allocation cycle extended beyond the authorization period, a decision would be made on how to forecast expected revenues. Typically, a growth factor, based on historic performance and factoring in the limitation rate from the last year of authorization, would be applied to the final authorization year and extended out to the final year of the RFFA cycle. While recent reauthorization bills have increased federal funding amounts, there has also been a recent history of extending authorization levels beyond the life of an authorization bill through continuing resolutions. This results in a flat rate of no growth from the last year of the previous authorization bill until a new bill is passed. A more conservative forecast method is to assume a flat level of funding from the last year of the current authorization bill to reflect the possibility of this potential scenario playing out through the years of funding to be allocated in the RFFA process. Finally, because the most recent reauthorization bill, the Bipartisan Infrastructure Law (BIL), significantly increased the amount of federal funding provided with historic levels of contributions from general fund sources (as opposed to dedicated revenues to the Highway Trust Fund such as the federal gas tax) and the dedicated federal gas tax revenue faces uncertainties in the face of fleet electrification, increasing fuel efficiency, and a flat rate structure, some transportation analysts advocate an even more conservative forecast method to expect reduced federal transportation funding.

Furthermore, CMAQ funding is held constant from FFY 2024 forward to reflect guidance from ODOT staff. This is because ODOT will update the inputs to the statewide distribution formula for CMAQ funds by FFY 2024 to address any changes brought about by updated population estimates and possible changes in other formula factors for areas within the state. While overall CMAQ revenues to the state are expected to grow at the same rates as other federal funding programs within the time of the authorization bill, the assumption of a no-growth rate for the Metro areas mitigates some of the risk that a new Oregon sub-allocation formula may reduce the proportion of CMAQ funds sub-allocated to the Metro area.

As started in federal fiscal year 2022, the region is eligible to receive federal redistribution funds from ODOT if the funds become available and the region meets its funding obligation targets. To become eligible for these funds, the region needs to utilize the administrative tools to obligate existing RFFA funds on schedule, consistent with the forecast and allocation objectives as described above. The forecast assumes the region will be successful in meeting the funding obligation targets, based on initial history of having received redistribution funds in 2022, 2023, and 2024. As redistribution funds are not a consistent source of funding, \$1 million per year is being forecasted. Actual awards are expected to

fluctuate year to year as redistribution amounts to Oregon depend on the actual funding obligation performance of other states.

The BIL created a new federal funding category that sub-allocates funds to the Metro region by federal formula named the Carbon Reduction program. The general purpose is to fund transportation projects and programs that reduce greenhouse gas emissions. Like the STBG funding program, a portion of the funding authorized for the state is required to be sub-allocated to large MPOs by a prescribed federal formula based on population.

The previous allocation of Carbon Reduction Program funds allocated funds made available between FFYs 2022 and 2026. This was different than the Regional Flexible Fund Allocation (RFFA) which allocated STBG, CMAQ, and TAP funds through FFY 2027. The amount of funds listed in FFY 2027 for CRP funding in Table 2 is the forecasted allocation of \$3,907,348 with the carryover from FFY 2026 of (\$47,927) for a total of \$3,859,421.

Metro assumes the Carbon Reduction Program will continue in future transportation authorizations. Because the funding was a new program in the last authorization bill, however, and the lack of confidence in sustaining current levels of transportation funding, Metro elected not to incorporate these funds into the Regional Flexible Fund Allocation for this cycle. The intention is to protect from overallocation of funds if the Carbon Reduction Program gets eliminated as part of the next transportation authorization. A separate but coordinated process will be undertaken for the allocation of Carbon Reduction Program funds.

Considering the above factors, Metro staff is proposing the following forecast methodology for the 2027-2030 RFFA cycle:

- Revenues estimates through current year (federal fiscal year 2024) are actual apportionments after limitation rates applied from ODOT's Finance Plan. Current year still subject to adjustments such as rescissions.
- Federal fiscal year 2024 - 2026 reflects federal authorization bill at 90% limitation rate.
- Assumes \$1 million per year in redistribution funds for years beyond most current redistribution.
- Federal fiscal years 2027-2030 reflects zero growth to year 2026 to account for possibility of a continuing resolution in the event a new authorization bill is not yet passed and to mitigate the risk of reduced general fund contributions to the Highway Trust Fund in the next authorization bill.
- No growth to CMAQ funding from federal fiscal year 2024 is forecasted for federal fiscal years 2025-2030 to mitigate risk of other eligible areas of the state receiving an increased share of state CMAQ funding.
- 2027 carry over amount is the difference between updated funding data, both actuals through FFY 2024 and forecasts for FFYs 2025-26, and the previous allocations of funds for those years. Carry overs can be additional revenues or revenue deficits depending on how updates performed relative to prior forecasts.

With the forecasting factors and the assumptions described above, the proposed revenue forecast for the 2028-2030 Regional Flexible Fund is listed below in Table 2.

Table 2. 2027-2030 Metro Regional Flexible Funds and Carbon Reduction Funds

| Fund Type | 2027 Carry over | 2028 | 2029 | 2030 | Total |
|----------------------|-----------------|---------------------|---------------------|---------------------|----------------------|
| U-STBG | | \$33,140,169 | \$33,140,169 | \$33,140,169 | \$99,420,507 |
| CMAQ | | \$13,799,833 | \$13,799,833 | \$13,799,833 | \$41,399,499 |
| TAP | | \$3,097,253 | \$3,097,253 | \$3,097,253 | \$9,291,759 |
| Redistribution | | \$1,000,000 | \$1,000,000 | \$1,000,000 | \$3,000,000 |
| RFFA Subtotal | \$0 | \$51,037,255 | \$51,037,255 | \$51,037,255 | \$153,111,765 |
| Carbon Reduction | \$3,859,421 | \$3,907,348 | \$3,907,348 | \$3,907,348 | \$15,581,465 |
| Total | | \$54,944,603 | \$54,944,603 | \$54,944,603 | \$168,693,230 |

The reflected revenue forecast for the 2028-2030 RFFA will guide the deliberation and selection of transportation projects and programs to support the Portland region’s effort to implement the long-range transportation plan. However, the revenue forecast provided is for allocation purposes and is intended as a snapshot of estimated revenues as of Spring 2024.

The revenue forecast will be updated just prior to the RFFA call for project applications so the Portland region may conduct this process with the best possible estimate at the time the allocation process begins. To provide stability to the allocation process, new information affecting the forecast after that point in time does not affect the amount allocated in that current cycle, unless policy action to make a change is taken up. Adjustments to the forecast and actual funding conditions after the allocation forecast is set are accounted for in the forecast of the following RFFA cycle or by policy action to make an adjustment.

Estimates continue to remain fluid as factors such as federal decisions on annual authorization and limitation rates are made. Metro staff will continue to collaborate with ODOT and the other Oregon MPOs on the methods to determine the funding authority and develop refined revenue estimates that will be utilized in each of the federal fiscal years of 2027 through 2030 for the purpose of establishing fiscal constraint. The funding authority determined in this process will be used in the MTIP programming process to limit the amount of funds that can be utilized by projects in each fiscal year of the 2027-30 MTIP. The MTIP programming is scheduled to be adopted in the summer of 2026 and is subsequently amended on a regular basis to reflect project cost and schedule adjustments and updated revenue amounts.

Step 3: Defining the Regional Flexible Fund Program Direction and Distributing Revenues to Programs (Winter 2024 – Spring/Early Summer 2024; Fall 2024 – Summer 2025)

The 2027-2030 RFFA begin in February 2024 at the regular meeting of TPAC. At that meeting a 20-month timeline and process is outlined for the kick-off of the Regional Flexible

Fund Allocation. The allocation is split into two processes: the first focuses on defining and refining the program direction for the funding allocation and the second focuses on the competitive capital grant process.

The newly adopted 2023 Regional Transportation Plan (RTP) policy objectives guide the investment priorities for the RFFA. Several of those objectives are continuations from the 2018 RTP which include equity, safety, climate, and mobility. A new policy objective of thriving economy resulted from the 2023 RTP. The RTP directs that further policy, planning and funding outcomes should advance the region toward its goals in these five areas.

Anticipated for JPACT and Metro Council is to reaffirm the same two-step process used to award funding since the 2012-2013 RFFA cycle:

- Step 1 continues the region’s commitment to repayment of bonds used to develop and construct high-capacity transit and active transportation projects. It also continues investments in region-wide programs to fund system and demand management activities and to invest in transit-oriented development projects near high-capacity transit lines. The region-wide programs are long-standing regional programs which have been established to meet various regional commitments, such as air quality, federal and state policy goals, and the Climate Smart Strategy.
- Step 2 focused funding on capital projects. Eligible applicants include agencies capable of entering an inter-governmental agreement with ODOT for funding and administering a federal aid transportation project; cities and counties, park districts, regional and state agencies.

Direction on the distribution of revenues to Step 1 programs and Step 2 project allocations is provided as a part of the 2027-2030 RFFA Program Direction documentation slated for adoption by the Metro Council in spring or early summer 2024. Final project and program allocations is scheduled for adoption in summer/autumn 2025 for incorporation into the 2027-2030 MTIP and STIP.

Throughout the program direction and RFFA process, Metro staff will also work with the local lead agencies and ODOT Region 1 staff to determine which projects awarded funding demonstrate they are ready to obligate funding for their projects and then program the awarded funding as needed by project phase. Many project phases are likely to be temporarily programmed in the illustrative MTIP years of 2031 or 2032 until the project demonstrates it will be ready to obligate funds in an earlier year. Assuming funding capacity is available, the MTIP will be amended to move projects forward at that time with the objective of utilizing as much funding capacity as possible with projects that are prepared to obligate those funds.

Step 4: On-Going Management of Forecast Amount and Programming of Project Costs (July 2023 – September 2027)

Management of the revenue forecast of expected available Regional Flexible Funds is on-going as federal and state actions will impact the amount of revenues made available for reimbursement of project costs awarded funding. As these funds are made

available each federal fiscal year, final decisions on how much funding is made available to a particular project phase is documented in the MTIP Programming tables. Programming is the balancing and assignment of available revenues for costs incurred by an eligible project.

How Metro staff recommend final programming of funds to project costs is directed by the awarded amount of funding to projects and programs by JPACT and Metro Council, the progress of the lead agency to complete steps to ensure a project is ready and eligible to receive the funds, and state and federal rules regarding TIP programming.

In modern program history, there has not been an occasion where projects that have been awarded funding by JPACT and Metro Council have been ready and requested more RFFA funding than has been available in a particular fiscal year. Should that occur in the future and Metro staff is unable to work out an acceptable solution with the lead agencies involved, Metro staff would provide a recommendation to JPACT and the Metro Council on resolution of such issue, if time allowed. A typical solution would be to delay one or more project phases eligibility to seek project cost reimbursement to the beginning of the subsequent fiscal year when additional funding becomes available. Programming of project costs and funding in subsequent years would potentially need to be adjusted to accommodate this shift.

OREGON DEPARTMENT OF TRANSPORTATION (ODOT) REVENUE FORECAST

The revenue forecast for state transportation funding is completed in four phases: Statewide total revenues forecast (May – September 2023;), Distribution of revenues to Categorical Policy Areas (May 2023 – November 2023), Categorical Policy Area sub-allocation distribution of revenues (November 2023 – Early 2024), Estimates of Funding Allocation Program revenues by ODOT Region and MPO Areas.

Step 1: Statewide Total Revenues Forecast (May – September 2023)

The statewide forecast of funds available for transportation projects and programs during the time period of the 2027-2030 State and Metropolitan Transportation Improvement Programs (TIP) is led by the state Finance and Budget Divisions, Statewide Investments Section of the ODOT. The forecast is shared with MPOs and Transit agencies in the state through the statewide TIP committee as information to build understanding related to the ODOT statewide revenue forecast and provide the MPOs a starting point for revenue estimates.

Revenue Assumptions

As a first step in revenue estimating, the forecast of ODOT administered funding is dependent on a federal authorization bill being in place or not in place. With an active federal authorization bill, the forecast includes the ratified funding levels by year outlined in the bill. When no federal authorization bill is in place, ODOT typically assumes a 10 percent reduction from current year levels to federal funding across all its funding program types

for all TIP years.³ However, in previous cycles where ODOT had assumed 10% reductions for the future federal fiscal years that amount resulted slightly too conservative, so an adjustment was made for the 2027-2030 STIP cycle. Due to the expiration of the Bipartisan Infrastructure Law (BIL), also known as the Infrastructure and Investments Jobs Act (IIJA), in 2026 and the unknown of a future federal funding authorization sustaining the same levels of funding as BIL, funding assumptions assume a 7.5% reduction. Or more specifically, the ODOT revenues projected for the 2027-2030 MTIP forecast, ODOT assumes a 7.5% reduction on the authorization levels starting for federal fiscal year 2026 the final year of BIL-IIJA.

In addition, certain programs established through BIL, such as the special bridge apportionment funding and the electric vehicle funding, have been removed as those programs were specific programs with special allocations from the IIJA.

Additionally, ODOT assumed a 10% limitation rate applied to federal fiscal years 2028, 2029 and 2030. The revenue estimates, in Tables 5, 6, 8 and 9, reflect the amount available after applying the limitation rate and the assumed reductions. Funding allocated to the MPOs (e.g., STBG and TAP) have their own forecast methodology described in the Metro MPO forecast section.

Federal Transportation Funding

The federal government provides revenues from federal fuels taxes and heavy truck taxes to states and local governments. Most federal funding is distributed to states and local governments by funding formulas, with the remainder allocated in competitive application-based programs. The current federal transportation authorization which dictates the distribution of federal funding to states is the Bipartisan Infrastructure Law (BIL) also known as the Infrastructure and Investments Job Acts (IIJA).

Oregon receives about \$600 million dollars in funding from the Federal Highway Administration (FHWA) each year for construction projects on the state's roads, including the interstate, as well as planning and engineering. Some funds can also be used for transit and bicycle/pedestrian capital projects. All federal highway funds flow through ODOT from individual federal funding programs that each have their own rules regarding what types of projects are eligible for those funds and what match rates are required. About 30 percent of those funds are distributed to local governments either directly by formula (e.g., urban-STBG program funds) or awarded through competitive application processes (e.g., HSIP program funds through the state ARTS allocation process). Oregon also receives public transportation funding from the Federal Transit Administration (FTA). These FTA funds are primarily used to support public transportation operated/contracted by ODOT or passed through to public transportation operators in small urban and rural areas. FTA works directly with transit agencies in large urban areas to provide funding for operations and projects. Table 3 provides a brief description of the various federal funding programs which contribute to the ODOT statewide revenue forecast.

³ Which specifically for the ODOT estimated revenues, applies only to federal fiscal year 2027.

Table 3. Federal Revenue Funding Programs Description

| Common Federal Revenue Funding Programs | |
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| Fund | Description |
| Surface Transportation Program (STBG) Funds – State allocation (includes STBG-TAP set-aside for state) (Formula) | The FAST Act converted the long-standing Surface Transportation Program into the Surface Transportation Block Grant Program acknowledging that this program has the most flexible eligibilities among all Federal-aid highway programs and aligning the program’s name with how FHWA has historically administered it. [FAST Act § 1109(a)]. The BIL/IIJA continues the Surface Transportation Block Grant program. The STBG promotes flexibility in state and local transportation decisions and provides flexible funding to best address State and local transportation needs. |
| Highway Safety Improvement Program (HSIP) (Formula) | The BIL continues the Highway Safety Improvement Program (HSIP) to achieve a significant reduction in traffic fatalities and serious injuries on all public roads, including non-state-owned public roads and roads on tribal lands. The HSIP requires a data-driven, strategic approach to improving highway safety on all public roads that focus on performance. |
| Rail-Highways Crossings (Sec. 130) (Formula) | The BIL continues the Railway-Highway Crossings program, which provides funds for safety improvements to reduce the number of fatalities, injuries, and crashes at public railway-highway grade crossings. |
| National Highway Freight Program (Formula) | The BIL establishes a new National Highway Freight Program to improve the efficient movement of freight on the National Highway Freight Network (NHFN) and support several freight related infrastructure improvement goals. |
| Congestion Mitigation Air Quality (CMAQ) Improvement Funds (Formula) | The BIL continues the CMAQ program to provide a flexible funding source to state and local governments for transportation projects and programs to help meet the requirements of the Clean Air Act. Funding is available to reduce congestion and improve air quality for areas that do not meet the National Ambient Air Quality Standards for ozone, carbon monoxide, or particulate matter (nonattainment areas) and for former nonattainment areas that are now in compliance. |
| National Highway Performance Program (Formula) | The BIL continues National Highway Performance Program which provides support for the condition and performance of the National Highway System (NHS), for the construction of new facilities on the NHS, and to ensure that investments of Federal-aid funds in highway construction are directed to support progress toward the achievement of performance targets established in a state's asset management plan for the NHS. |
| Carbon Reduction Program (Formula) | The BIL establishes the Carbon Reduction Program (CRP), which provides funds for projects designed to |

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| | reduce transportation emissions, defined as carbon dioxide (CO ₂) emissions from on-road highway sources. |
| Promoting Resilience Operations for Transformative, Efficient, and Cost-saving Transportation (PROTECT) Program (Formula) | The BIL established the new Promoting Resilience Operations for Transformative, Efficient, and Cost-saving Transportation (PROTECT) Program. The program is intended to provide funding for planning, capital resilience improvements, capacity-building for community resilience, evacuation planning and preparation, and other related activities. |
| Less Common Federal Revenue Funding Programs⁴ | |
| Fund | Description |
| Emergency Relief | The BIL continues the Emergency Relief program, which provides funds for emergency repairs and permanent repairs on federal-aid highways and roads, tribal transportation facilities, and roads on federal lands that the U.S. DOT Secretary finds have suffered severe damage as a result of natural disasters or catastrophic failure from an external cause. |
| Federal Lands Access Program | Provides funds for projects on Federal Lands Access Transportation Facilities that are located on or adjacent to, or that provide access to federal lands. Funding program is a competitive grant program. |
| State Recreational Trails Program | The BIL continues the optional set-aside of Surface Transportation Block Grant (STBG) program funding for Recreational Trails Program. Set aside amount is equal to the state portion of the Transportation Alternatives program. Program is at the discretion of the Governor to decide whether to continue State Recreational Trails Program. |
| Discretionary Federal Revenue Funding Programs | |
| Fund | Description |
| Existing Federal Miscellaneous Discretionary Grants (e.g., RAISE, NHFP – Discretionary, FAST Lane, INFRA, ITS, etc.) | Competitive discretionary grant programs with specific criteria for application and project eligibility. Discretionary grant programs cycles are driven by federal annual budget and transportation reauthorization. Funds from these discretionary grant programs are not guaranteed. |
| BIL/IIJA Federal Grant Program (e.g., PROTECT, National Infrastructure Project Assistance Program, Bridge Investment Program, Wildlife Crossings Program, Congestion Relief Program, Healthy Streets Program) ⁵ | Competitive discretionary grant programs with specific criteria for application and project eligibility. These programs were created through the passage into law the Bipartisan Infrastructure Law (BIL) (also known as the Infrastructure Investment and Jobs Act). Discretionary grant programs cycles are driven by federal annual budget and federal rulemaking. These programs are currently only authorization through the |

⁴ Not an exhaustive list of federal revenue programs.

⁵ The discretionary funding programs established through the passage of the Bipartisan Infrastructure Law are only authorized through federal fiscal year 2026. These discretionary programs may not exist, modified, or revised come the start of federal fiscal year 2027.

| | |
|---|--|
| | end of BIL – federal fiscal year 2026. Funds from these discretionary grant programs are not guaranteed. |
| Rural Area Specific Federal Revenue Funding Programs | |
| Fund | Description |
| Clackamas County Surface Transportation Block Grant (STBG) Fund Exchange Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT. State funding with is provided to Clackamas County via agreement with AOC/LOC. |
| Multnomah County Surface Transportation Block Grant (STBG) Fund Exchange Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT to Multnomah County. State funding with is provided to Multnomah County via agreement with AOC/LOC. I |
| Washington County Surface Transportation Block Grant (STBG) Fund Exchange Allocation | Rural Surface Transportation Block Grant allocated and administered by ODOT to Washington County. State funding with is provided to Washington County via agreement with AOC/LOC |
| Planning Specific Federal Revenue Funding Programs | |
| Fund | Description |
| Metropolitan Planning (PL) Formula | The BIL/IIJA continues the Metropolitan Planning program. The Program establishes a cooperative, continuous, and comprehensive framework for transportation planning and making transportation investment decisions in metropolitan areas. Program oversight is a joint Federal Highway Administration/Federal Transit Administration responsibility. |
| Statewide and Non Metropolitan Planning (SPR) (FHWA/FTA) Formula | The BIL/IIJA continues the statewide and nonmetropolitan planning process, which establishes a cooperative, continuous, and comprehensive framework for making transportation investment decisions throughout the State. Oversight of this process is a joint responsibility of the Federal Highway Administration and the Federal Transit Administration. |
| MPO Specific Federal Revenue Programs (Sub-Allocations from Formula Funds above) | |
| Fund | Description |
| Surface Transportation Program (STBG) Funds – Urban | The Surface Transportation Block Grant (STBG) Program provides flexible funding that may be used by metropolitan planning organizations, and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals. |
| Transportation Alternatives (TA) - Urban | The FAST Act eliminates the MAP-21 Transportation Alternatives Program (TAP) and replaces it with a set-aside of Surface Transportation Block Grant (STBG) program funding for transportation alternatives (TA). These set-aside funds include all projects and activities that were previously eligible under TAP, encompassing a variety of smaller-scale transportation projects such |

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|--------------------------------|---|
| | as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to storm water and habitat connectivity. |
| Carbon Reduction Program (CRP) | Created through the Bipartisan Infrastructure Law, the federal aim of the new program is to reduce transportation emissions through the development of State carbon reduction strategies and fund projects designed to reduce transportation emissions. Ingrained in the surface transportation authorization as a formula program, states and large metropolitan areas receive a direct allocation of funds. |

State Transportation Funding

In addition to federal revenue funding programs, Oregon raises revenues for transportation infrastructure, maintenance, operations, and other related activities. Managed and administered by ODOT, the state revenues are generated from a variety of sources, including taxes on the sale of gasoline, vehicle registration fees, and weight-mile fees on trucks. Additionally, new transportation revenue programs are in development by the state and are further described in the following section.

Table 4 provides a brief description of state revenue funding programs, including those which exist as well as those in development.

Table 4. State Revenue Funding Programs Descriptions

| State Revenue Funding Programs | |
|--------------------------------|---|
| Fund | Description |
| State Highway Trust Fund | <p>Oregon’s State Highway Trust Fund collects resources from three main sources:</p> <ul style="list-style-type: none"> • Taxes on motor fuels, including gas tax and diesel tax. • Taxes on heavy trucks, including the weight mile tax and truck registrations. • Driver and vehicle fees, including licenses and vehicle title and registration. <p>Under the Oregon Constitution, State Highway Fund fees and taxes must be spent on roads, including bikeways and walkways within the highway right of way. State funds can be used for both construction projects and the day-to-day maintenance and operations of the state’s roads. Formulas set in state statute distribute about 40 percent of State Highway Fund revenues (after deducting the costs of collecting the revenue) to cities and counties.</p> |
| House Bill (HB) 2017 | <p>House Bill 2017 Transportation Funding Package passed by the 2017 Oregon Legislature created a number of new revenue sources for transportation.</p> <ul style="list-style-type: none"> • A 0.5 percent vehicle dealer privilege tax on new car sales to fund rebates for electric vehicles and provide ongoing funding for the multimodal Connect Oregon program. |

| | |
|------------------------------|---|
| | <ul style="list-style-type: none"> • A 0.1 percent employee payroll tax (\$1 for \$1,000 in payroll) to improve public transportation service in both rural and urban communities. • A \$15 tax on the sale of new bicycles with tires over 26 inches and cost at least \$200 will go to Connect Oregon for off-road bicycle and pedestrian paths that serve commuters. |
| Other State Funds | <p>ODOT also receives revenue from several other state sources, including:</p> <ul style="list-style-type: none"> • Lottery funds, including lottery bond proceeds directed to the Connect Oregon program. • Cigarette tax revenues dedicated to transit services for seniors and disabled people. • Custom license plate fees, dedicated to operating passenger rail. • General fund resources for senior and disabled transit and passenger rail service. • A variety of transportation-related permits and fees. |
| Pricing and Tolling Projects | <p>Oregon is establishing a toll program and expects to administer tolling that includes three projects in the 2027-2030 timeframe covered by this report. The I-205 Toll Project (point toll at Abernethy Bridge) and the Regional Mobility Pricing Projects (congestion pricing on I-5 and I-205) are currently being developed by Oregon. There will also be a toll at the I-5 Interstate Bridge as part of the Interstate Bridge Replacement program. This program is being developed by the states of Oregon and Washington. Revenue associated with these projects has not been determined.</p> |

Pricing Programs – Tolling

Tolling is part of ODOT's long-term strategy to help pay for transportation improvements and provide faster, more efficient trips through the Portland metro area. The Oregon Toll Program consists of two toll projects in development: the I-205 Toll Project and the Regional Mobility Pricing Project. Toll revenues from the Oregon Toll Program projects will help fund transportation projects in the Portland metro area and maintain and improve our region’s multimodal transportation system. The Interstate Bridge Replacement Program is also proposing a bridge toll as a funding source and tool to improve corridor mobility.

The I-205 Toll Project will implement a point toll at the Abernethy Bridge, which spans the Willamette River between Oregon City and West Linn. Toll revenue will help repay a portion of the construction costs to make the I-205 Abernethy Bridge earthquake ready and support congestion management goals. Preliminary (level 1) Traffic and Revenue analysis has been conducted for this project and a Level 2 evaluation will be conducted in 2024. Prior to setting toll rates and bonding, an Investment Grade (level 3) Analysis will be completed in 2025.

The Regional Mobility Pricing Project (RMPP) will toll I-5 and I-205 in the Portland metro area to provide faster, more efficient trips and to help pay for transportation improvements. This toll project is studying tolls on I-5 between the Columbia River and the Boone Bridge in Wilsonville, and on I-205 from the Columbia River to where I-205 intersects with I-5 in Tualatin. Preliminary (level 1) Traffic and Revenue analysis will be conducted in 2024 for this project.

The Interstate Bridge Replacement (IBR) program is co-led by the Oregon and Washington Departments of Transportation. The program will replace the I-5 bridge over the Columbia River and North Portland Harbor Bridge with seismically sound bridges; enhance high capacity transit options across the Columbia River; and improve safety, traffic flow, and active transportation facilities. Tolls will generate revenue to help fund construction and facility operations and maintenance, as well as manage demand and improve mobility through the corridor. The Level 2 Traffic and Revenue analysis was completed in 2023 with work beginning on the Level 3 Traffic and Revenue analysis in 2024. Prior to setting toll rates and bonding, an Investment Grade (level 3) Analysis will be completed in 2025. Due to the bi-state nature of the IBR program and the role of two Transportation Commissions, toll rates and policies may be different from the other projects within the Oregon Toll Program.

Estimated Transportation Revenues

The combined estimated federal and state revenues available statewide for transportation is approximately \$3 billion dollars for federal fiscal years 2027 through 2030. A summary of estimated revenues by year is provided in Table 5.

Also included in Table 5 is an estimate of federal discretionary grant and congressional directed spending awards to the state of Oregon, by year.⁶ Recognizing BIL-IIJA created numerous federal discretionary programs which may not exist in the next surface transportation reauthorization, the method for estimating discretionary revenues for the region is based on two factors: 1) secured discretionary grants in the Portland metropolitan area between federal fiscal years 2021 through 2024; 2) a 25 percent reduction to account for assumed reductions in available discretionary grants upon the expiration of BIL-IIJA. This method acknowledges transportation partners in Oregon will continue to pursue available discretionary programs for funding and have a strong history of securing discretionary grants. The awards are an estimate and are not secured funding distributed to states by formulas set in statutes or rules. The estimates are not a guarantee of award.

Table 5. ODOT Revenue Forecast - Unallocated STIP Revenue, Federal Fiscal Years 2028-2030
(All revenues are in millions)

| Program Type | 2028 | 2029 | 2030 | Total |
|---|----------------|----------------|----------------|------------------|
| Federal Formula Programs | | | | |
| National Highway Performance Program (NHPP) | \$318.0 | \$318.0 | \$318.0 | \$954.00 |
| Surface Transportation Block Grant (STBG) | \$160.3 | \$160.3 | \$160.3 | \$480.90 |
| Highway Safety Improvement Program (HSIP) | \$46.1 | \$46.1 | \$46.1 | \$138.30 |
| Rail | \$2.7 | \$2.7 | \$2.7 | \$8.10 |
| Congestion Mitigation Air Quality | \$20.1 | \$20.1 | \$20.1 | \$60.30 |
| Planning (PL) | \$5.1 | \$5.1 | \$5.1 | \$15.30 |
| National Highway Freight Program (NHFP) | \$15.6 | \$15.6 | \$15.6 | \$46.80 |
| Carbon Reduction Program | \$14.2 | \$14.2 | \$14.2 | \$42.60 |
| Promoting Resilience Operations for Transformative, Efficient, and Cost-saving Transportation (PROTECT) Program | \$16.2 | \$16.2 | \$16.2 | \$48.60 |
| Federal Formula Program Total | \$598.3 | \$598.3 | \$598.3 | \$1,794.9 |
| Federal Discretionary Grant Programs | | | | |

| | | | | |
|--|----------------|----------------|----------------|----------------|
| Existing and New Federal Discretionary Grants and Congressional Directed Spending (e.g., RAISE, NHFP – Discretionary, INFRA, PROTECT, National Infrastructure Project Assistance Program, Bridge Investment Program, Wildlife Crossings Program, Congestion Relief Program, Healthy Streets Program, etc.) | \$25.0 | \$25.0 | \$25.0 | \$75.0 |
| Federal Discretionary Grant Programs Total | \$25.0 | \$25.0 | \$25.0 | \$75.0 |
| State Programs | | | | |
| <u>House Bill (HB) 2017</u> | | | | |
| HB Safety | \$10.0 | \$10.0 | \$10.0 | \$30.0 |
| HB Bridge/Seismic | \$126.8 | \$126.8 | \$126.8 | \$380.4 |
| HB Preservation/Culvert | \$43.4 | \$43.4 | \$43.4 | \$130.4 |
| HB 2017 Apportionment | \$180.2 | \$180.2 | \$180.2 | \$540.6 |
| <u>Other Sources</u> | | | | |
| State Funds ⁷ | \$30.3 | \$30.3 | \$30.3 | \$90.6 |
| | | | | |
| Other Apportionment | \$30.3 | \$30.3 | \$30.3 | \$90.9 |

If less or additional revenues become available than had been forecasted, ODOT manages actual revenues through the STIP amendment process. Federal revenue authority is made available through and subject to the federal authorization, apportionment/appropriation, obligation authority and rescission processes, so actual amounts will vary year to year. State generated revenue is generated by the conditions associated with the collection of those revenues and subject to year-to-year fluctuations.

Step 2: Distribution of Revenues to Categorical Policy Areas (May 2023 – November 2023)

In May 2023, ODOT staff kicked off the development of the 2027-2030 STIP at the May Oregon Transportation Commission (OTC) meeting, prior to the adoption of the 2024-2027 STIP. As part of kicking off the discussion, the Commission made two early decisions to

⁷ A significant portion of the state highway fund is used for ODOT’s agency operations and as a result are not included as part of the revenue forecast of transportation funds estimated available for transportation projects and programs.

shape the revenue forecast of the ODOT administered funds, as well as shape the categories in which forecasted revenues will get allocated to.

The first decision by the Commission was to assume a 7.5% reduction in federal funding for federal fiscal years 2027 through 2030. This decision emerged from the absence of a federal authorization bill addressing federal fiscal years 2027 through 2030 and the highly uncertainty of federal revenues in four to seven years from today. By making this revenue assumption early in the development of the 2027-2030 STIP is to ensure ODOT does not over-commit resources, which could result in the cancelation of projects. However, feedback and public comment submitted to the Commission requested ODOT and the OTC reconsider this assumption spurred a deliberate discussion by the Commission. After some deliberation by the Oregon Transportation Commission members, the Commission moved forward with a revenue assumption to assume a 10% reduction in federal funding.

The Commission carried forward most of the same funding categories utilized since the 2021-2024 STIP. These are:

- **Fix-it** – provides funding for projects which maintain or fix the state highway system. As part of the development process, ODOT will seek direction from the OTC to continue with the current categories or modify program categories.
- **ADA Program** - funding for the update of ADA curb ramps statewide.
- **Safety** – projects that are focused on reducing fatal and serious injury crashes on Oregon’s roads
- **Public and Active Transportation** (formerly non-highway) – funds bicycle, pedestrian, public transportation and transportation options projects and programs
- **Local Programs** – provides direct funding to local governments and MPOs so they can fund priority projects
- **Other Functions** – provides funding for workforce development, planning and data collection and administrative programs using federal resources. In the 2027-20230 STIP, this includes funding for 82nd Avenue and State Bridge Inspection and Load rating.

ODOT staff returned to provide the Commission with a broad estimate the 2027-2030 STIP is expected to be a little under \$3 billion statewide.

The Oregon Transportation Commission (OTC), was briefed and about the 2027-2030 STIP, including an overview of available funding and proposals around how to spend unallocated amounts. As has been noted through those discussions, the 2027-2030 STIP provides less funding than previous cycles. In 2026 the federal Infrastructure Investment and Jobs Act (IIJA) expires, potentially ending new funding programs and reducing current funding levels. In addition, the Commission directed ODOT to allocate projected revenues to help cover operations and maintenance shortfalls, Americans with Disabilities Act (ADA) requirements, and bond repayments to meet the settlement agreement and infrastructure

delivery schedule for the Americans with Disabilities Act (ADA) program. The ADA program bonded GARVEE bonds during the 2024-2027 STIP cycle. These bond payments will be made with federal funding which in the past has been used for other investment areas and funding capacity is being borrowed from future years. The allocation in Tables 6, 8, and 9 reflect the allocation of projected revenues to address the different elements of the ADA program, but not all of those funds are available within the 2027-2030 timeframe as funding has been advanced to delivery ADA infrastructure sooner.

ODOT estimates that there will be \$70,571,951 of unallocated funds. ODOT staff recommended that these funds be directed in a way to support key outcomes adopted by the Commission; the outcomes highlighted as the primary lenses in the Oregon Transportation Plan are safety, equity, and climate. With this in mind, ODOT aims to take a strategic approach to outcomes with an evolution of the Great Streets Program — Great Streets 2.0. This next phase of an already established and successful approach will continue to look for project opportunities across the state (with funding from other programs), that can have expanded, and more impactful scopes of work focused on key outcomes and provide the highest benefit to the system and communities.

Table 6. Allocation to ODOT Funding Categories (Statewide) Combined for FFY 2028-2030

| Category | Amounts |
|----------------------------------|------------------|
| Fix-it | \$640.0 |
| ADA Curb Ramps | \$625.0 |
| Safety | \$177.4 |
| Public and Active Transportation | \$192.8 |
| Local Programs | \$461.9 |
| Other Functions | \$387.6 |
| TOTALS | \$2,484.7 |

Step 3: Distribution of Revenues to Funding Allocation Programs (November 2023 and Early 2024)

The topical policy areas are made up of individual funding allocation programs. After the OTC decision on the distribution of revenues to the topical policy areas, ODOT staff then distributed the forecasted revenues to the individual funding allocation programs within each topical policy area. The following are the funding allocation programs outlined in Table 7.

Table 7. Description of ODOT Funding Programs

| <u>Fix-It Category</u> | |
|---|--|
| Fund/Program | Description |
| Fix-It Program - Bridge | The Fix-It Bridge program addresses state bridges and the maintenance and operations of bridges within ODOT control. |
| Fix-It Program – Highway Pavement Maintenance | This is the non-capacity enhancing operations and maintenance component to ODOT’s overall system preservation. The Highway Pavement Maintenance program addresses the maintenance, operations, and asset |

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|--|---|
| | management needs of the interstate and state-owned network. |
| Fix-It Program – Culvert | The Culvert program addresses the rehab and replacements of roadway culverts. |
| Fix-It Program – Operations | The Operations program addresses the maintenance, operations, and asset management of operations equipment, such as traffic signals, ramp meters, variable message signs, and other communications equipment. |
| HB2017 – Bridges Designates a portion of HB2017 funding for Bridge Project | Allocates 70% of House Bill 2017 net revenue for bridge/seismic projects. |
| HB2017 – Pavement Preservation and Culvert Maintenance | Allocates 24% of House Bill 2017 net revenue for pavement and culvert projects. |
| PROTECT (Promoting Resilience Operations for Transformative, Efficient, and Cost-saving Transportation) Program - Projects | Funds for capital resilience improvements, capacity-building for community resilience, and other related activities. |
| <u>ADA Category</u> | |
| Fund/Program | Description |
| ADA Curb Ramps | Provides funding for the update of ADA curb ramps statewide. |
| ADA Push Buttons | Provides funding for the update of ADA push buttons statewide. |
| Garvee Bond Repayment (ADA) | The ADA program will be bonding GARVEE bonds during the 2024-2027 STIP cycle. These bond payments will be made with federal funding which in the past has been used for other investment areas. |
| <u>Safety Category</u> | |
| Fund/Program | Description |
| All Roads Transportation Safety (ARTS) | A data-driven, jurisdictionally blind safety program to address safety on all public roads. |
| Rail Crossing Safety | Funds highway grade crossing safety improvement projects to reduce the number of fatalities, injuries, and crashes at public railway-highway grade crossings. |
| HB2017 funding for Highway Safety | Allocates \$10 million per year for Safety improvements and projects. Allocation to projects is discretionary and for small scale, quick capital projects in enhance the safety for users. |
| <u>Public and Active Transportation Category</u> | |
| Fund/Program | Description |
| Off-System Bicycle/Pedestrian | Funds bicycle and pedestrian paths or trails outside of the highway right of way. |
| Safe Routes to School Education | Funds education and outreach efforts that improve, educate, or encourage children safely walking (by foot or mobility device) or biking to school. |
| Transportation Options | Funds ODOT’s Transportation Options program which supports efforts to improve travel choice for Oregonians |

| | |
|---|--|
| | and improve the efficiency with which people and goods move through the transportation system. |
| ODOT SRTS Infrastructure | Pedestrian and bicycle infrastructure projects which address the needs of students who walk and bike to school, specifically focused on the state-owned system. |
| Great Streets 2.0 | Program is to address the need for a comprehensive funding program for ODOT roadways to improve walking, bicycling and transit access on arterials that also act as main streets through communities. |
| Rec Trails Program | Funds provided to Oregon State Parks for recreational trail projects. |
| Transit Elderly & Disabled | Public transportation funding for capital, purchased service and preventive maintenance projects that serve the mobility needs of people with disabilities and seniors. |
| Bicycle and Pedestrian | Funds bicycle and pedestrian facilities within the right-of-way of public roads, streets or highways open to motor vehicle traffic to meet the requirement for ODOT to spend 1% of State Highway Fund dollars on biking and walking enhancements. |
| HB2017 Safe Routes to Schools Program | Provides \$15 million per year for the Safe Routes to School Program. This program focuses on infrastructure on making sure safe walking and biking routes exist through investments in crossings, sidewalks and bike lanes, flashing beacons, and the like. ODOT administers a competitive infrastructure grant program. |
| Local Programs Category | |
| Fund/Program | Description |
| Surface Transportation Program to large MPOs | STBG Funds allocated to the three (3) Transportation Management Area agencies for program and projects. |
| Transportation Alternatives Program to large MPOs | TAP Funds allocated to the three (3) Transportation Management Area agencies for program and projects to address non-roadway needs. |
| MPO Planning | Funds allocated to the MPOs throughout the state to address federal transportation planning requirements. |
| Congestion Mitigation and Air Quality Improvements (CMAQ) | Funds allocated to MPOs and local agencies in eligible areas to address air quality issues throughout the state. |
| Local Bridge | Funding allocated to address locally owned bridge projects which are located on local facilities. ODOT's Bridge Section coordinates selection and funding of Federal Highway Bridge Program bridges through the Local Agency Bridge Selection Committee, a committee of city, county, and state representatives. Local agency bridges are prioritized using a Technical Ranking System and selected in categories of Large (30,000+ square feet of deck area), Small On-System, and Small Off-System. |
| STBG Allocation to Cities, MPOs & Counties | Funding allocated to local agencies via the Association of Counties/League of Cities agreement. Agencies receiving funding are non-TMA MPOs, Counties and Cities above 5,000 population and outside of MPOs. |

| | |
|---|--|
| Immediate Opportunity Fund | Provides funding to construct and improve streets and roads to serve site-specific economic development projects. Managed in cooperation with the Oregon Business Development Department. |
| Transportation Growth Management (TGM) | The Transportation Growth Management (TGM) program is to support community efforts to expand transportation choices. By linking land use and transportation planning, TGM works with local governments to create vibrant, livable places in which people can walk, bike, take transit or drive where they want to go. The TGM Program awards grants on an annual basis. TGM grants are for planning work leading to local policy decisions. TGM typically awards between \$2 and \$2.5 million per cycle. Projects are selected on a competitive basis within each of the five ODOT regions. The regional allocation – funds available for projects - is based on a formula that considers the number of cities and the population within a region. Grants generally have two-years for projects to be negotiated and completed. Award amounts range between \$75,000 and \$250,000. |
| Other Functions Category | |
| Fund/Program | Description |
| State Planning and Research (SPR) | Funding for statewide planning and research as part of federal requirements. |
| Workforce Development and On Job Training | Funds allocated to the ODOT Office of Civil Rights. |
| Indirect Cost Allocation Plan (ICAP) | Funds allocated to recoup overhead costs as approved by FHWA |
| Carbon Reduction - State | Funds for projects designed to reduce transportation emissions, defined as carbon dioxide (CO2) emissions from on-road highway sources |
| PROTECT Planning | Planning activities to support the PROTECT program |
| Local Climate Planning | Planning activities to assist local governments for meeting the transportation planning rule |
| Maintenance & Operations Federalization | Funds for federalization of eligible ODOT maintenance and operational activities |
| 82 nd Avenue | These funds are dedicated to bringing 82 nd Avenue to a state of good repair and to meet basic safety standards as part of the jurisdictional transfer from ODOT to the City of Portland. |
| State Bridge Inspection/Load Rating | Program which is federally required for bridge inspections and load rating work throughout the state. |

Table 8. Revenue Allocation Amounts to ODOT Funding Programs (Statewide), Combined for FFY 2028-2030

| |
|-----------------|
| Category |
| Fix-it |

| | |
|--|-------------------------|
| Bridge & Seismic | \$380.4 |
| Preservation | \$130.4 |
| Operations | \$76.0 |
| Culverts | Mixed with preservation |
| PROTECT | \$53.2 |
| ADA Curb Ramps | |
| Garvee Bond Repayment (ADA) | \$310.0 |
| ADA Curb Ramps | \$245.0 |
| ADA Push Button | \$70.0 |
| Safety | |
| All Roads Transportation Safety | \$146.1 |
| Rail Crossing Safety | \$9.0 |
| HB2017 Safety | \$22.3 |
| Public and Active Transportation | |
| Off-System Bicycle and Pedestrian | \$31.3 |
| Safe Routes to School Education | \$4.0 |
| Transportation Options | \$7.5 |
| Great Streets | \$70.5 |
| Transportation Alternatives Program – Recreational Trails | \$4.5 |
| Transit Elderly and Disabled | \$5.0 |
| Bicycle-Pedestrian 1% | \$25.0 |
| HB2017 Safe Routes to School Infrastructure | \$45.0 |
| Local Programs | |
| Surface Transportation Program to Large MPOs | \$131.7 |
| Transportation Alternatives Program | \$20.2 |
| MPO Planning | \$19.3 |
| Congestion Mitigation and Air Quality | \$60.5 |
| Local Bridge | \$94.5 |
| Surface Transportation Program Allocation to Cities/Counties/Small MPO | \$105.0 |
| Transportation and Growth Management | \$15.0 |
| Carbon Reduction – TMA | \$15.5 |
| Other Functions | |
| State Planning and Research | \$85.2 |
| Workforce Development/On the Job Training | \$5.0 |
| Indirect Cost Allocation Plan (ICAP) | \$118.4 |
| Carbon Reduction – State | \$44.8 |
| PROTECT Planning | \$1.0 |
| Local Climate Planning | \$4.0 |
| Maintenance & Operations Federalization | \$75.0 |
| 82 nd Avenue | \$30.0 |
| State Bridge Inspection/Load Rating | \$24.0 |

Step 4: Estimates of Funding Allocation Program Revenues to ODOT Region 1 and the Portland Metro MPO Area (Winter 2024 – Early 2025)

Estimates of each ODOT funding allocation program that could be available to the areas encompassed by ODOT Region 1 and for the Metro Metropolitan Planning Area were created, other than for services provided by ODOT as a statewide program. These estimates were made to provide context for MPO areas to understand potential levels of ODOT investment in their area transportation systems so that they could consider strategy of all investments in meeting the areas priority needs, and then communicating those strategies and priorities to ODOT staff and the allocation processes decision making structure.

The key for Table 9 summarizes the methods used to develop a forecast or estimate of the revenues that could flow to transportation projects or services. The ODOT Region 1 allocations and estimates were made based on historic trends from those programs, where available. The historical allocations were calculated to find the estimated percentage of how much of the funding program total was allocated to projects with ODOT Region 1. With funding programs which are new and previous allocation a rough estimated range was identified based on the funding program rules.

Recognizing ODOT Region 1 encompasses areas outside the Portland metropolitan region, a reduced level of funding was estimated for funding coming to the Metro metropolitan planning area within ODOT Region 1. The specific method used for this amount is summarized in the key to Table 10.

These estimates are not to be interpreted as a commitment of an allocation of funds, but only an estimate to provide MPO areas the ability to understand the scale of funding available within programs to inform the development of the MTIP to pursue and advocate to ODOT or the Oregon Transportation Commission on local/regional priorities.

In the Portland metropolitan area, the following estimates were developed for the ODOT funding allocation programs.

Table 9. ODOT Funding Program Amounts, Federal Fiscal Years 2027-2030

| Funding Program | Statewide Amount | ODOT Region 1 Estimated Amount | Metro MPA Estimated Amount |
|---------------------------------|-------------------------|---------------------------------------|-----------------------------------|
| Fix-it | | | |
| Bridge & Seismic | \$380.4 | \$133.1* | \$106.4/ |
| Preservation | \$130.4 | \$19.6* | \$15.7/ |
| Operations | \$76.0 | \$21.4* | \$17.12/ |
| Culverts | Mixed with preservation | | |
| PROTECT | \$53.2 | \$9.1^ | \$3.3+ |
| Sub-Total | \$640.0 | \$183.2 | \$142.5 |
| ADA Curb Ramps | | | |
| Garvee Bond Repayment (ADA) | \$310.0 | N/A | N/A |
| ADA Curb Ramps | \$245.0 | \$122.5* | \$98.0& |
| ADA Push Button | \$70.0 | \$32.9* | \$26.3/ |
| Sub-Total | \$625.0 | \$155.4 | \$124.3 |
| Safety | | | |
| All Roads Transportation Safety | \$146.1 | \$43.8* | \$35.0/ |

| | | | |
|---|------------------|----------------|-----------------|
| Rail Crossing Safety | \$9.0 | \$4.4* | \$3.5/ |
| HB2017 Safety | \$22.3 | \$5.8* | \$4.6/ |
| Sub-Total | \$177.4 | \$54.0 | \$43.2 |
| Public & Active Transportation | | | |
| Community Paths Program (Off-System Bicycle and Pedestrian) | \$31.3 | \$13.0^ | \$11.5^ |
| Safe Routes to School Education | \$4.0 | \$1.6^ | \$1.48^ |
| Transportation Options | \$7.5 | \$0.8^ | \$0.8^ |
| Great Streets 2.0 | \$70.5 | \$31.7^ | \$26.1^ |
| Transportation Alternatives Program – Recreational Trails | \$4.5 | \$2.0* | \$1.7^ |
| Transit Elderly and Disabled | \$5.0 | \$1.7* | \$1.4/ |
| Bicycle-Pedestrian 1% | \$25.0 | \$6.0# | \$4.8/ |
| HB2017 Safe Routes to School Infrastructure | \$45.0 | \$7.2^ | \$5.7/ |
| Sub-Total | \$192.8 | \$64.0 | \$53.48 |
| ODOT Directed Funding Total | \$1,635.2 | \$456.6 | \$363.48 |
| Federal Discretionary (FHWA programs only) | | | |
| Federal Discretionary Grants and Congressional Directed Spending | N/A | \$75.0* | \$60.0/ |
| Sub-Total | N/A | \$75.0 | \$60.0 |
| Local Programs | | | |
| Surface Transportation Program to Large MPOs | \$131.7 | | |
| Transportation Alternatives Program | \$20.2 | | |
| MPO Planning | \$19.3 | ** | ** |
| Congestion Mitigation and Air Quality | \$60.5 | | |
| Carbon Reduction TMA | \$15.5 | | |
| Sub-Total Local to MPO | \$247.2 | | |
| Local Bridge | \$94.5 | \$33.1* | \$26.5/ |
| Surface Transportation Program Allocation to cities, counties (non MPO areas), and small MPOs | \$105.0 | \$6.2 | N/A |
| Transportation and Growth Management | \$15.0 | \$3.0* | \$2.5/ |
| Sub-Total Local to City/County | \$214.5 | \$42.3 | \$29.0 |
| Local Program Sub-Total | \$461.7 | \$42.3 | \$29.0 |
| Other Functions | | | |
| State Planning and Research | \$85.2 | \$11.0* | N/A |
| Workforce Development/On the Job Training | \$5.0 | N/A | N/A |
| Indirect Cost Allocation Plan (ICAP) | \$118.4 | N/A | N/A |
| Carbon Reduction – State | \$44.8 | \$20.2^ | \$16.6^ |
| PROTECT Planning | \$1.0 | N/A | N/A |
| Local Climate Planning | \$4.0 | \$1.8^ | \$1.5^ |
| Maintenance & Operations Federalization | \$75.0 | N/A | N/A |
| 82 nd Avenue | \$30.0 | \$30.0# | \$30.0# |
| State Bridge Inspection/Load Rating | \$24.0 | \$10.8^ | \$8.9^ |
| Other Functions Sub-Total | \$387.4 | \$73.8 | \$57.0 |
| Total (not including federal discretionary funding) | \$2484.3 | \$572.7 | \$449.5 |

| | | | |
|---|-----------------|----------------|----------------|
| Carbon Reduction TMA | \$15.5 | | |
| Sub-Total Local to MPO | \$247.2 | | |
| Local Bridge | \$94.5 | \$33.1* | \$26.5/ |
| Surface Transportation Program Allocation to cities, counties (non MPO areas), and small MPOs | \$105.0 | \$6.2 | N/A |
| Transportation and Growth Management | \$15.0 | \$3.0* | \$2.5/ |
| Sub-Total Local to City/County | \$214.5 | \$42.3 | \$29.0 |
| Local Program Sub-Total | \$461.7 | \$42.3 | \$29.0 |
| Other Functions | | | |
| State Planning and Research | \$85.2 | \$11.0* | N/A |
| Workforce Development/On the Job Training | \$5.0 | N/A | N/A |
| Indirect Cost Allocation Plan (ICAP) | \$118.4 | N/A | N/A |
| Carbon Reduction - State | \$44.8 | \$20.2^ | \$16.6^ |
| PROTECT Planning | \$1.0 | N/A | N/A |
| Local Climate Planning | \$4.0 | \$1.8^ | \$1.5^ |
| Maintenance & Operations Federalization | \$75.0 | N/A | N/A |
| 82 nd Avenue | \$30.0 | \$30.0# | \$30.0# |
| State Bridge Inspection/Load Rating | \$24.0 | \$10.8^ | \$8.9^ |
| Other Functions Sub-Total | \$387.4 | \$73.8 | \$57.0 |
| | | | |
| Total (not including federal discretionary funding) | \$2484.3 | \$572.7 | \$449.5 |

Key for Determining MPO Area Estimates

| Forecast Amount to ODOT Region 1 | |
|---|--|
| TBD | Not yet defined how ODOT Region sub-allocation or project allocations will be made. |
| ^ | Allocated through competitive, discretionary, or mandated statewide process. Forecast 37% of funds come to Metro region based on % of state population unless otherwise noted. |
| * | Estimate based on historic allocation performance % or direct awards in last STIP cycle. |
| # | Actual ODOT Region sub-allocation target. |
| @ | Estimate based on percentage of statewide long-range funding forecast |
| Forecast Amount to Metro area portion of ODOT Region 1 | |
| / | Metro area forecast based on estimate of 80% of Region 1 funding allocated to Metro area projects. Typically used unless historical allocations or program purpose or direction indicates a different percentage more appropriate. |
| ^ | Allocated through competitive, discretionary, or mandated statewide process. Forecast 37% of funds come to Metro region based on % of state population unless otherwise noted. |
| ~ | Reflects actual amount awarded in federal fiscal years 2025-2027 from the funding program in the Portland metropolitan region. |
| + | Assumes a lower amount than 37% due to typical locations of PROTECT projects being outside the Portland metropolitan region. |
| & | Assumes a larger percentage of the ADA funds allocated for the 2027-2030 STIP will be spent in Region 1 due to the distribution of ramps across the state and where the outstanding work will remain. |
| ** | Denotes revenues are depicted and included in the metropolitan planning organization portion of the 2027-2030 MTIP revenue forecast. |

TRANSIT AGENCY REVENUE FORECASTS

The revenue forecast and funding allocation process for transit funding for TriMet and SMART is completed in three phases:

- Estimation of the transit agency revenues (Fall of the previous year – Spring the following year),
- Forecasted distribution of estimated transit agency revenues to transit agency budget programs (Winter – Spring), and
- Adoption of final annual budget (Spring – Summer of each year for the subsequent fiscal year).

This revenue forecast documents the first two steps of this process. TriMet and SMART provide a description of the third step with the MPO annually in conjunction with their budget process.

A revenue forecast for transit funding takes place annually as part of the agency’s budget process, which differs from the three-year funding cycle allocation undertaken by Metro and ODOT for the allocation of federal, state, and regionally significant local revenues. The transit agencies revenue forecast uses the annual budget process to inform the development of the transit portion of the revenue forecast of the 2027-2030 MTIP.

SOUTH METRO AREA REGIONAL TRANSIT (SMART) REVENUE FORECAST

Step 1: SMART Revenue Forecasting (Fall – Spring – Annually)

As part of SMART’s annual budget process, a revenue and expenditure forecast are developed. This MTIP reports on SMART’s revenue forecast for the relevant MTIP years of 2024 through 2027. Base assumptions to developing the forecast are based on historical trends and updated with actual appropriations and limitations. SMART begins with a baseline by averaging the most recent 3-year revenues. Anticipated levels of funding are then forecasted from the baseline with an expected increase of 1%-8%. The forecast will be adjusted if changes to revenues or current cost structures change significantly. SMART collaborates with TriMet and C-TRAN to determine shares of the Urbanized Area Formula Funds from the Federal Transit Administration as they become available.

Non-Federal Operating Revenues

- **Payroll Tax:** SMART’s predominant source of ongoing funding is the local payroll tax levied on businesses performing work in Wilsonville assessed on gross payroll and/or self-employment earnings. The payroll tax on local businesses covers employment within city limits and in 2008 the tax rate was raised to its current level of .5 percent (.005). Transit tax funds are used to pay for SMART operations and to leverage funding from federal and state grants. Payroll tax amounts collected

by the City typically increases year to year, as companies increase their payroll through wage adjustments and as the economy grows with new businesses relocating to the City.

- **Passenger Fares:** A small component of local funding includes charges for services, such as fare box and transit pass sale revenue. SMART’s commitment to diversity, equity and inclusion is augmented by offering fare free service on nearly all routes. Currently, SMART charges fares for the regional Route 1X that travels between Salem and Wilsonville and a regional Dial-a-Ride program that provides door-to-door medical trips for Wilsonville residents to the greater metro area.
- **Other Revenues:** SMART recognizes a small percentage of other income received by way of investment and donations. These monies are outside of the traditional structure of revenues and may be reinvested or reallocated.
- **Statewide Transportation Improvement Fund (STIF):** With the passage of House Bill 2017, the Oregon Legislature made a significant investment in transportation to help advance the things that Oregonians value—a vibrant economy, strong communities, high quality of life, a clean environment, and safe, healthy people. SMART is part of that investment, connecting many regional communities through coordination with numerous transportation partners. STIF funds enable SMART to leverage federal funding for capital purchases and expand regional transit connectivity. SMART seeks plan approval from Wilsonville’s City Council and Clackamas and Washington County Advisory Committees before submitting to TriMet’s STIF Advisory Committee for regional approval. The plan is then packaged, reviewed by ODOT, and approved by the Oregon Transportation Commission.

Federal Grants

- Funding is apportioned on the basis of legislative formulas. For areas with populations of 200,000 and more such as the Portland-Vancouver urbanized area, the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles as well as population and population density. These funds are sub-allocated by agreement within the urbanized area between TriMet, C-Tran, and SMART; the three transit agencies that serve the metropolitan area.
- **Section 5307 Urbanized Area Formula Program:** Eligible activities include: planning, engineering, design and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement, overhaul and rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities; and capital investments in new and existing fixed guideway systems including rolling stock, overhaul and rebuilding of vehicles, communications, and computer hardware and software. In addition, associated transit improvements and certain expenses associated with mobility management programs are eligible under the program. All preventive maintenance and some Americans with Disabilities Act complementary

paratransit service costs are considered capital costs. Urbanized areas of 200,000 or more may not use funds for operating assistance.

- Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program:** Formula funding for the purpose of operating assistance in meeting transportation needs of the elderly and persons with disabilities. FTA Section 5310 Elderly and Disabled Capital program funds are funds to be used to make purchases of capital equipment or construction of small facilities. SMART receives a small amount of funds as a “direct recipient” of FTA monies.
- Section 5339 Bus & Bus Facilities Formula Grant Program:** Provides funding to states and transit agencies through a statutory formula to replace, rehabilitate, and purchase buses and related equipment and to construct bus-related facilities. In addition to the formula allocation, this program includes two discretionary components: The Bus and Bus Facilities Discretionary Program and the Low or No Emissions Bus Discretionary Program. The Bus and Bus Facility Discretionary program funds are distributed through a competitive process by the FTA. These funds can be used only for the purchase of rolling stock or the construction of transit facilities that support transit bus operations. The Low or No Emissions Bus Discretionary program provides for the purchase or lease of zero-emission and low-emission transit buses as well as acquisition, construction, and leasing of required supporting facilities. These funds are allocated through a highly competitive process. Future awards are dependent on the specific process outlined by the FTA and the strength of other project proposals competing against SMART’s requests for funding. SMART has had a successful track record in securing these and other FTA grant funds for replacement buses.

Table 10. SMART Revenue Forecast, Federal Fiscal Years 2027-2030

| Revenues | FY 2027 | FY 2028 | FY 2029 | FY 2030 | FYs 2027-30 Total |
|-------------------------|--------------------|--------------------|---------------------|---------------------|---------------------|
| Passenger Fares | \$20,000 | \$20,000 | \$20,000 | \$20,000 | \$80,000 |
| Payroll Taxes | \$6,150,000 | \$6,200,000 | \$6,250,000 | \$6,300,000 | \$24,900,000 |
| Federal Formula Grants* | \$806,000 | \$854,000 | \$905,000 | \$959,000 | \$3,524,000 |
| STIF | \$2,500,000 | \$2,700,000 | \$2,900,000 | \$3,100,000 | \$11,200,000 |
| Other Funding | - | - | - | - | - |
| Total | \$9,476,000 | \$9,774,000 | \$10,075,000 | \$10,379,000 | \$39,704,000 |

*Federal Formula Grants include federal funding revenues listed in more detail below.

Table 11. Federal Grants to SMART Forecast, Federal Fiscal Years 2027-2030 (From the SMART Programming of Projects)

| Funding Source | FY 2025 | FFY 2027 | FFY 2028 | FFY 2029 | FFY 2030 |
|----------------|---------|----------|----------|----------|----------|
|----------------|---------|----------|----------|----------|----------|

| | | | | | |
|--|-----------|---|-----------|-----------|-----------|
| Section 5307 Urbanized Area Formula | \$630,000 | \$708,000 | \$750,000 | \$795,000 | \$843,000 |
| Section 5310 Enhanced Mobility of Seniors & Individuals w/Disabilities | \$31,000 | \$35,000 | \$37,000 | \$39,000 | \$41,000 |
| Section 5339 Bus & Bus Facilities | \$56,000 | \$63,000 | \$67,000 | \$71,000 | \$75,000 |
| Other Federal Discretionary Funding Awards | - | TBD – will be programmed if applications for funding are awarded at the discretion of the Federal Transit Administration or other federal agency. | | | |

Step 2: SMART – Distribution of Revenues to Major Budget Categories (Winter – Spring – Annually)

SMART has two main categories of activities in its budget process that are assigned forecasted revenues; operations and capital.

All plans and concepts that SMART utilizes are derived from goals of the Wilsonville City Council, SMART’s governing board. Department goals are then used, along with community participation, to create a Transit Master Plan (TMP). The TMP is the primary guiding document that recommends project implementation. Included in the TMP is the Statewide Transportation Improvement Fund (STIF) Plan which, in general, is allocated for route expansion and regional connectivity. These plans allow SMART staff to forecast the apportionment of funding to specific capital projects and operational expansions.

SMART relies on ODOT’s Transit Asset Management Group Plan (TAM) in determining funding for current and future maintenance of transit assets, such as rolling stock, infrastructure, equipment, and facilities. SMART uses the TAM in coordination with the TMP to forecast the funding needed for assets in correlation to future projects.

Operations

Total day-to-day Operating Requirements for all activities required to operate the system (including other post- employment benefits) and Debt Service (if applicable). Sub-categories, especially categories that are typically assigned federal grant program revenues, include:

- Bus Preventive Maintenance
Description: Labor and materials/services used for on-going maintenance of the SMART Bus fleet. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues and local payroll tax revenue sources.
- Bus Purchase

Description: Purchase of buses for fixed route service. This budget category utilizes federal Section 5339(a) Grants for Buses & Bus Facilities Formula Program revenues, Statewide Transportation Improvement Fund revenues, and local payroll tax revenues.

- Services for Seniors and People with Disabilities

To fund mobility management activities and purchase of travel training services for services focused on the elderly and persons with disabilities. This budget category utilizes federal Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program revenues.

Capital Improvement Program

Purchase and installation of bus shelters and passenger amenities at bus stops. It may also include construction of administrative and maintenance facilities to support the transit system. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues and local payroll tax revenue sources.

Step 3: Adoption of Annual Budget (Spring – early Summer – Annually)

Each year SMART shares with the MPO the proposed budget for the upcoming fiscal year. This takes place at the regular committee meeting of TPAC. The presentation includes the budget themes and categories. It also includes the federal programming of projects. Further information is provided on the budget process and timeline. The MPO has the opportunity to comment on the budget, request information regarding how the proposed budget reflects regional transportation planning priorities and vote on including proposed federal transit fund programming is to be included in the MTIP.

In conjunction with the annual budget process, SMART publishes the federally required “Program of Projects,” showing how federal grant funding for the upcoming fiscal year will be proposed for inclusion in the current Metropolitan Transportation Improvement Program. This proposed programming will have the most current forecast of available funds and may include new programming or be an update to existing programming of the federal grant funds. An opportunity for public comment on the Program of Projects is also provided as a part of this process.

The SMART budget process includes a minimum of two public Budget Committee meetings. The City’s Budget Committee consists of the five city councilors and five citizens at large. The citizens are appointed by the governing body and serve three-year terms. Once the budget is approved by the committee it is then sent to City Council for final adoption. City Council adopts the budget prior to July 1.

TRIMET – REVENUE FORECAST

Step 1: Developing the Revenue Forecast (Fall – Spring – Annually)

As part of TriMet’s annual budget process, a 10-year revenue and expenditure forecast are developed. This MTIP forecast utilizes the 10-year budget forecast and reports on the relevant MTIP years of 2027 through 2030. TriMet has six categories of revenues: passenger fares, payroll taxes, Statewide Transportation Improvement Funds, other funding, operating grants (federal and non-federal), and capital improvement grants (federal).

A brief description of each of the six categories of revenues are provided below.

1. Passenger fares: funds from the sale of passes and individual fares. Fare collection revenue is forecasted to grow at varying rates from 10.4% in 2027 to 6.1% in 2030. A fare increase goes into effect in January 2024, but no additional increases are currently forecast after that.
2. Payroll taxes: revenues from a tax on the wages paid by an employer and the net earnings from self-employment for services performed within the TriMet District boundary. The current rate is 0.8037% and increases by 0.01% annually to 0.8237% by 2026. Employer tax revenues during this time are expected to increase due to economic recovery.
3. Statewide Transportation Improvement Fund (STIF): STIF funds are collected from the State of Oregon and passed through initially to Qualified Entities (QEs), such as TriMet, to support planning, deployment, operation, and administration of Public Transit Service Provider’s (PTSPs) transportation programs in the state. STIF funds can also be used for light rail operating expenses.

STIF is primarily funded through a tax on employees (one-tenth of 1%) and effective July 1, 2023, with the merger of the Special Transportation Fund Program (STF), includes revenues derived from ID cards, non-highway gas and cigarette taxes. The tax rate is set by the Oregon Legislature.
4. Other Funding: Approximately 18% of other funding is sourced from revenue streams that have equal expenditures to TriMet and no net gain to the agency (Intergovernmental Agreements or funding exchanges). The remaining 82% of this revenue stream is mostly comprised of transit advertising, cost per ride reimbursements for Oregon Department of Human Services, City of Portland reimbursement for Streetcar personnel, Energy Tax Credit Sales revenues, and other smaller, miscellaneous revenues.
5. Operating Grants: Federal, State, and local sources that are described below, funds many of TriMet’s operating projects.

Federal Operating Grants can include:

- **FTA Section 5307 Urbanized Area Formula Program:** This funding is apportioned based on legislative formulas and comes to areas with populations of 200,000 and more, such as the Portland-Vancouver urbanized area (UZA). These formula funds are based on several factors, including bus & fixed guideway revenue vehicle miles, passenger miles, operating costs, population, and population density measures. These funds are then sub-allocated by agreement (“split letter”) between TriMet, C-Tran (in Washington state) and SMART based on an agreed-upon methodology.

While this funding can be used on various public transportation capital and planning projects, TriMet historically uses these funds for Bus and Rail Preventive Maintenance.

- **Section 5337 State of Good Repair (SGR) Grant Program (High Intensity Motorbus/HIMB and High Intensity Fixed Guideway/HIFG):** This funding is also apportioned to our urbanized area (UZA) with a population of 200,000 or more, based on legislative formulas. Funds are allocated to the UZAs for high-intensity fixed-guideway systems are based on fixed-guideway vehicle revenue miles and directional route miles reported to the National Transit Database (NTD) and what the UZA would have received in the FY 2011 fixed-guideway modernization formula using the current definition of fixed guideway. High-intensity motorbus funds are allocated to UZAs based on high-intensity vehicle revenue miles and directional route miles reported to the NTD. Only HIMB funds are sub-allocated between two transit agencies, TriMet and C-Tran, as TriMet is the only operator of rail services currently for HIFG funding.

This funding program provides capital assistance for maintenance, replacement, and rehabilitation projects of existing high-intensity fixed guideway and high-intensity motorbus systems to help transit agencies maintain assets in a state of good repair. SGR funds are also eligible for developing and implementing Transit Asset Management (TAM) plans. TriMet historically uses these funds for Bus and Rail Preventive Maintenance.

- **Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Program:** Formula funding is to improve mobility for seniors and individuals with disabilities by removing barriers to transportation services and expanding the transportation mobility operations available. These funds are allocated to the UZA based on factors, other than NTD, including census data for older adults and people with disability populations. These funds are then sub-allocated between TriMet, C-Tran and SMART.

TriMet passes through the majority of these funds to a Subrecipient, Ride Connection, a non-profit organization, to provide these services.

- **Surface Transportation Block Grant and Congestion Mitigation Air Quality Programs:** Surface Transportation Block Grant (STBG) funds may be used for a wide range of projects to preserve and improve the conditions and performance of surface transportation, including highway, transit, intercity bus, bicycle, and pedestrian projects. Congestion Mitigation Air Quality (CMAQ) funds may be used for capital expenditures that demonstrate a reduction of air pollutant emissions therefore providing an air quality benefit.

TriMet historically receives both of these program funds indirectly from Metro, as committed in prior or current agreements. Every year those funds are available to TriMet, TriMet requests those funds be transferred from the Federal Highway Administration (FHWA) to the Federal Transit Administration (FTA) where funds are managed under FTA's Section 5307 Program.

TriMet typically uses these funds for either Bus and Rail Preventive Maintenance or Debt Service payments for Capital Grant Revenue Bonds that were taken out to pay for large capital projects.

Non-Federal Grants can include revenues from local and state sources, such as ODOT 5310 funds, City of Wilsonville Westside Express Service (WES) operating assistance and other local contributions.⁸ These small contributions account for a limited amount of revenue in TriMet's overall annual budget.

6. Capital Grants: TriMet has many capital projects accounted for under its Capital Improvement Program (CIP) that are funded by Federal, State, and local sources, such as:
 - a. Capital Improvement Grants (CIG): The Federal Transit Administration provides funding through a multi-year competitive process for transit capital investments, including heavy rail, commuter rail, light rail, streetcars, and bus rapid transit. Federal transit law requires transit agencies seeking CIG funding to complete a series of steps over several years to be eligible for funding. The discretionary grant program requires completion of certain project phases depending on the project type and CIG being pursued (New Starts, Core Capacity or Small Starts). At this time, there are multiple projects planning to seek CIG funds during this timeframe, but no new

⁸ TriMet considers pass through funds from ODOT, such as the FTA 5310 funding, as non-operating revenues because they are passed through the state.

capital improvement grants have been secured for receipt within the 2027-2030 time period, so they are not yet included in the forecast.

b. **Section 5339(a) Grants for Buses & Bus Facilities Formula Program:**

Funding to states and transit agencies through a statutory formula to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities. These funds are allocated to our UZA based on bus revenue vehicle miles, passenger miles, and operating costs reported to NTD as well as population and population density measures. These funds are then sub-allocated between TriMet, C-Tran and SMART.

TriMet historically uses these funds to purchase fixed route vehicles.

c. FTA, USDOT and EPA Discretionary funds:

- i. The Section 5339 Program includes two discretionary components: the Bus and Bus Facilities Discretionary Program and the Low or No Emissions Bus Discretionary Program. TriMet historically submits applications to help fund several of our non-CIG projects, such as Merlo Garage, Columbia Operations Facility, Articulated Buses, or LIFT vehicles. TriMet has been successful in receiving 5339 discretionary grants in the past under both programs.
- ii. There are several new discretionary programs under the Infrastructure Investment and Jobs Act and Inflation Reduction Act. TriMet is seeking these discretionary funds to support the fleet transition, Climate Action Plan, state of good repair and ridership recovery efforts. Those potential discretionary grants are not included in the forecast since they have not yet been awarded.

Table 12. Summary of TriMet Forecasted Revenues, Fiscal Years 2027 – 2030

| Revenues (Millions of \$) | FY 2027 | FY 2028 | FY 2029 | FY 2030 | Total |
|------------------------------|---|----------------|------------------|------------------|------------------|
| Passenger Fares | \$77.0 | \$81.9 | \$86.9 | \$92.2 | \$338.0 |
| Payroll Taxes | \$596.5 | \$626.2 | \$657.3 | \$690.0 | \$2,570.1 |
| STIF | \$70.5 | \$73.2 | \$76.0 | \$78.9 | \$298.5 |
| Other Funding | \$35.9 | \$36.9 | \$38.0 | \$39.1 | \$149.9 |
| Operating Grants* | \$170.8 | \$176.7 | \$149.5 | \$139.6 | \$636.7 |
| Capital Improvement Grants** | No forecast - to be determined on award of grants | | | | |
| Total | \$950.7 | \$994.9 | \$1,007.7 | \$1,039.8 | \$3,993.2 |

*Operating Grants include federal, state, and local funding. Federal revenues are listed in more detail below.

** At this time, there are no new capital improvement funds secured during the 2027-2030 time period.

Table 13. Federal Grants to TriMet, Federal Fiscal Years 2024-2027 (Part of Operating and Capital Grants element of Table 12, in millions)

| Funding Source | FFY 2027 | FFY 2028 | FFY 2029 | FFY 2030 | Total |
|---|--|----------------|----------------|----------------|----------------|
| Section 5307 Urbanized Area Formula | \$59.6 | \$61.4 | \$63.3 | \$65.2 | \$249.5 |
| Section 5337 State of Good Repair | \$46.6 | \$48.5 | \$50.4 | \$52.4 | \$197.9 |
| Section 5310 Enhanced Mobility of Seniors & Individuals w/Disabilities | \$2.3 | \$2.3 | \$2.4 | \$2.5 | \$9.5 |
| Section 5339(a) Bus & Bus Facilities | \$3.5 | \$3.6 | \$3.8 | \$3.9 | \$14.8 |
| Sub-Total | \$112 | \$115.8 | \$119.9 | \$124 | \$471.7 |
| STBG and/or CMAQ⁹ | \$21.7 | \$17.3 | \$17.3 | \$17.2 | \$73.5 |
| Other Federal Discretionary Funding Awards | TBD – revenues will be programmed if applications for funding are awarded at the discretion of the Federal Transit Administration or other federal agency. | | | | |
| Total | \$133.7 | \$133.1 | \$137.2 | \$141.2 | \$545.2 |

⁹ Revenues reflected as part of metropolitan planning organization revenue forecast (within the Metro Regional Flexible Fund section).

Step 2: TriMet – Distribution of Revenues to Major Budget Categories (Winter – Spring – Annually)

TriMet has four major categories of activities in its budget process that are assigned forecasted revenues; (1) operations, (2) capital improvement program, (3) pass through and special payments, and (4) contingency and ending fund balance.

1. **Operations:** Day-to-day activities required to operate the systems, including other post-employment benefits and debt service payments.
 - **Bus & Rail Preventive Maintenance:** Labor and materials/services used for on-going maintenance of TriMet’s Bus and Rail fleets. This budget category typically utilizes Section 5307 Urbanized Area Formula Program revenues, Section 5337 State of Good Repair Program revenues and STBG or CMAQ funds.
 - **Vehicle Purchases:** Purchase of buses for fixed route service. This budget category utilizes Section 5339(a) Buses & Bus Facilities Formula Program revenues or Section 5339(c) Low or No Emission Bus Competitive Program revenues, when awarded. All fixed route fleet purchases will be zero-emissions moving forward.
 - **Paratransit and E&D services:** The majority of TriMet’s direct Section 5310 funds are allocated to a private non-profit organization to provide transportation services for seniors and individuals with disabilities.
2. **Capital Improvement Program:** TriMet typically seeks Federal Transit Administration (FTA) CIG and other discretionary programs funding for large capital projects. A current example is the MAX Red Line Extension & Reliability Improvement Project that was authorized the full FTA CIG funding in FY2022. At this time, there are multiple projects planning to seek CIG funds during this timeframe, but no new capital improvement grants have been secured for receipt within the 2027-2030 time period. However, if funds are awarded, they will be added to the MTIP through the amendment process.
3. **Pass Through and Special Payments:** As a Qualified Entity and acting as a pass-through agent, TriMet receives State funds that are required to be passed through to other governmental agencies and qualified Subrecipients, such as funding from Statewide Transportation Improvement Fund (STIF) Program.

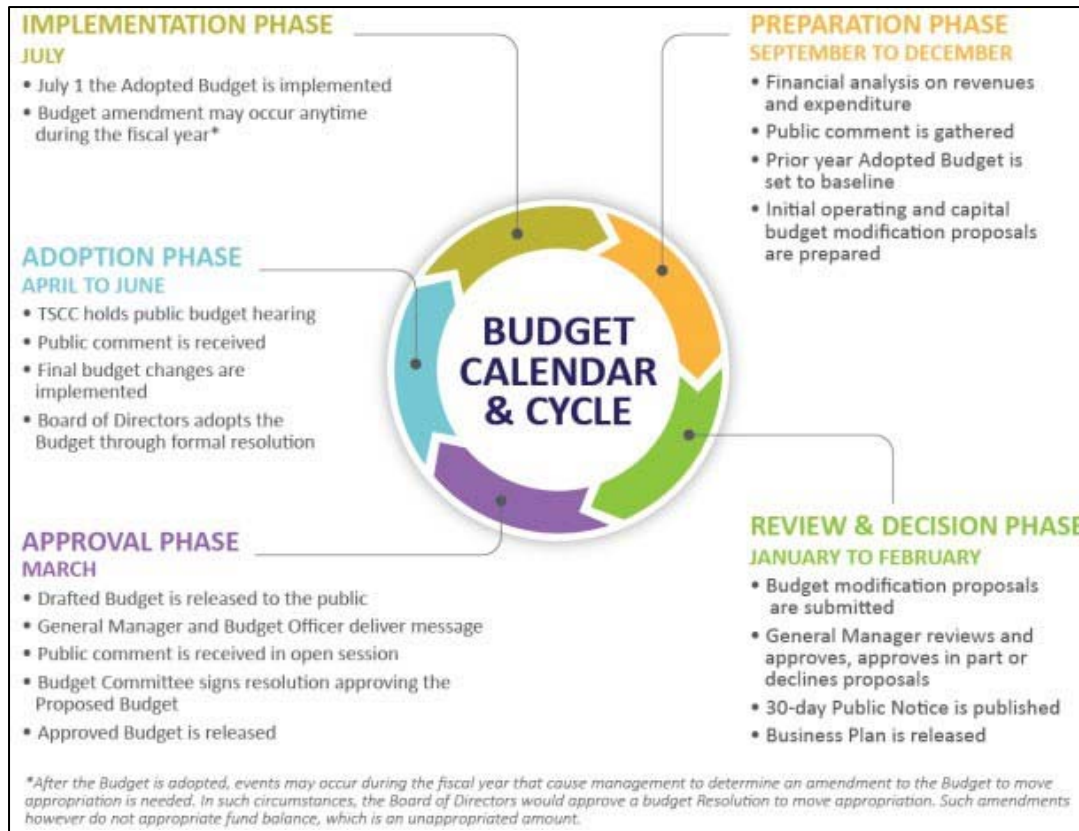
TriMet also receives Federal CMAQ and/or STBG funds indirectly from Metro, later transferred to FTA under the Section 5307 Program, which is typically used for TriMet’s Bus & Rail Preventive Maintenance. These Federal funds are later exchanged with Metro for TriMet’s General funds.
4. **Contingency and Ending Fund Balance:** Contingency is an appropriated amount of a minimum of 3% of operating requirements and is adjusted for risks and those activities unknown at the time of budget adoption.

Ending Fund Balance is unappropriated and not available for spending in the budget fiscal year. Fund balance includes restricted revenues such as bond proceeds, funds required to be spent after the budget year, including future debt service payments. Unrestricted fund balance contains between 2.0 and 2.5 months operating reserves as required by the TriMet Board of Directors.

Step 3: Adoption of Annual Budget (Spring – Summer – Annually)

The development, adoption, and implementation of the TriMet budget has five phases as summarized in Figure 1 below.

Figure 1. TriMet Annual Budget Development Cycle



The TriMet budget process is guided by the agency’s Vision, Mission and Values, the annually updated Business Plan with a 5-year horizon, Financial Policies, and a budget process that complies with budget law. The current TriMet budget and a description of the budget process for the next fiscal year is available at <https://trimet.org/budget/>.

Coordination of the TriMet Budget, Program of Projects and the MTIP

Each year TriMet shares with the MPO the proposed budget for the upcoming fiscal year. This takes place at the regular committee meetings of TPAC and JPACT. The presentation includes the budget themes and categories and the federal programming of projects. Further information is provided on the budget process and timeline. The MPO has the

opportunity to comment on the budget, request information regarding how the proposed budget reflects regional transportation planning priorities and vote on including proposed federal transit fund programming is to be included in the MTIP.

In conjunction with the annual budget process, TriMet publishes the federally required “Program of Projects” or POP, reporting how FTA grant funds for the upcoming fiscal year, will be proposed for inclusion in the current Metropolitan Transportation Improvement Program. The proposed programming will have the most current forecast of available, upcoming FTA funds and may reference additional FTA funds that have been awarded since last POP.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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Memo



Metro

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Portland, OR 97232-2736

Date: Friday, January 26, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner
Subject: 2027-2030 MTIP Program Direction and Work Program

Purpose

Provide TPAC an overview on the program direction and the work plan for the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).

Introduction and Background

As part of Metro's responsibilities as a metropolitan planning organization, the agency is responsible for the development and implementation of the Metropolitan Transportation Improvement Program (MTIP). The MTIP is a document listing the regionally significant transportation investment priorities for the upcoming fiscal years, a description of the process – and regional engagement in that process – in identifying and measuring the performance of those investments, and a monitoring tool which outlines administrative procedures for implementing the MTIP. As part of the documenting the process, key MTIP partners (ODOT, TriMet, SMART, and Metro) demonstrate how the region works together to achieve the common goal of implementing the most recently adopted Regional Transportation Plan (RTP) and complying with applicable federal regulations to remain eligible for funding.

TPAC, as a technical advisory committee to Metro on metropolitan transportation planning activities, plays a role in the development and recommending approval of the MTIP. In efforts to support TPAC in this role, Metro staff aims to keep TPAC informed and provide opportunities for input and engagement on the development activities which will request inclusion in the draft 2027-2030 MTIP. Recognizing several key 2027-2030 MTIP development activities will occur throughout 2024 and 2025, the program direction and work plan are to assist TPAC in advising key MTIP partners – Metro, ODOT, TriMet, and SMART – on the 2027-2030 MTIP activities and development.¹

2027-2030 MTIP – Development Activities

The development of the 2027-2030 MTIP formally began in spring 2023 with the discussions of ODOT's revenue estimates and allocations of those revenues to funding programs for federal fiscal years 2028-2030. While a process initiated by an agency other than Metro may not be presumed as the kickoff to the development of the next MTIP cycle, the MTIP is unique in that four key partners – Metro, ODOT, TriMet, and SMART – each play a significant role in the development of the MTIP through their individual allocations federal surface transportation funding. Therefore, the general timing and process in starting the development of the upcoming MTIP can vary by agency.

Thus, the development of 2027-2030 MTIP is underway, but there remains a number of planning activities prior to the adoption of the 2027-2030 MTIP scheduled for July 2026. To date, Metro staff

¹ TPAC plays a role in the development of the upcoming MTIP (i.e. the 2027-2030 MTIP) as well as in the administration of the current MTIP (i.e. the 2024-2027 MTIP). These activities usually operate in parallel, but most commonly activities related to the administration of the current MTIP come to TPAC in the form of MTIP amendments to funded projects.

brought forward or plans to have TPAC participate in the following 2027-2030 MTIP development activities:

Past/Current Activities

- ODOT's 2027-2030 STIP development (July 2023 – On-Going)
 - Overview on revenue estimates, fiscal outlook, state priorities, and updated state policies/plans (July 2023)
 - Revenue estimate and allocation of 2028-2030 revenues to ODOT funding programs
 - Comment letter development, approval, and submissions (October 2023)
 - Update on ODOT staff recommendation on the revenue allocation to ODOT funding programs going before the Oregon Transportation Commission (OTC) (November 2023)
 - Update on OTC action and next steps for funding allocations (January 2024)
- Initial draft 2027-2030 MTIP revenue forecast (February 2024)

Upcoming Activities

- Revise 2027-2030 MTIP financial forecast (as needed)
- Review and potentially recommend regional comment on Metro area interests to ODOT funding program allocations for federal fiscal years 2028-2030 (also referred to as the 2027-2030 STIP development)
 - For funding programs led by ODOT Region 1 office (i.e., Fix-It, ARTS)
 - For funding programs led by central ODOT (i.e., Great Streets, Carbon Reduction, Community Paths, Safe Routes to School, etc.)
- Review and potentially recommend regional comment on TriMet and SMART Annual Budget Process – Fiscal Year 2024-2025
- 2028-2030 Regional Flexible Fund allocation process and recommendation to JPACT/Metro Council
- Provide input on the update to the methodology for evaluation the 2027-2030 MTIP package of transportation investments²
 - Refinements and revisions to reflect the articulated investment priorities identified in the 2023 RTP
 - Additions or revisions to reflect the adoption recommendations from the 2023 RTP

2027-2030 MTIP Program Direction – Overview and Purpose

In December 2023, the region achieved a significant milestone when the 2023 Regional Transportation Plan (RTP) was approved by MPAC and JPACT and adopted by the Metro Council. In the adoption of the 2023 RTP, the region updated its long-range vision for the transportation system, revised and added new policies to achieve the vision, set forth the region's long-term investment strategy to support the Plan's policies, and communicated a set of near-term transportation investment priority outcomes.

The newly adopted 2023 RTP aligns to the development cycle for the 2027-2030 MTIP and its integration to the MTIP. The program direction for the 2027-2030 MTIP purpose is to incorporate and operationalize RTP policy objectives and investment priorities in this early stage of the 2027-

² Investments identified for the evaluation stage are those projects which were awarded and/or programmed for funding within the federal fiscal year 2027-2030 timeframe.

2030 MTIP development process. The program direction communicates to key MTIP partners the regional policy priorities and outcomes expected to be considered as those partners prioritize transportation projects and programs for funding. As the 2027-2030 MTIP is compiled, those partners will be expected to document how their funding decisions accommodated consideration of the regional policy priorities and how the projects requesting inclusion in the MTIP expect to make progress towards those policy priorities and outcomes.³

2027-2030 MTIP Program Direction – Key Elements and Updates

To guide the development of the 2027-2030 MTIP, federal law directs two overarching elements provide the foundation for all metropolitan transportation improvement programs. These two overarching elements are:

1. The long-range Metropolitan Transportation Plan (MTP) - (a.k.a the Regional Transportation Plans (RTP))
2. Federal regulations outlined in the Code of Federal Regulations (CFR) Title 23 Chapter I, Subchapter E – Planning and Research, Part 450 – Metropolitan Planning

In recognition of the direction federal law requires, the program direction for the 2027-2030 MTIP reiterates and reaffirms federal regulations and how they are operationalized specific to the Portland metropolitan region.

Additionally, the 2027-2030 MTIP program direction will include an updated regional funding approach, revised to reflect changes in various federal and state funding programs as a result of federal transportation reauthorizations and state direction. The regional funding approach was first developed and approved by JPACT and adopted by the Metro Council in 2009, with revisions in 2016. In recognition over the course of the next 1-2 years the region as well as the state legislature will have a discussion on funding and potential transportation revenue package, Metro staff proposes an interim status for the regional funding approach in efforts to guide the development of transportation funding and allocation activities taking place in parallel with the 2027-2030 MTIP. The regional funding approach will then be updated with the outcomes of those transportation funding activities should any new actions occur.

2027-2030 MTIP – Work Plan

While the 2027-2030 MTIP has been in development since spring 2023 there remains a number of activities to complete prior to compiling the adoption draft of the 2027-2030 MTIP. To provide clarity and allow partners to anticipate key activities, Metro staff developed an At-A-Glance (attachment 1) summary work plan for the 2027-2030 MTIP. The work plan breaks up the development of the 2027-2030 MTIP into five phases of work: 1) revenue forecast and program direction; 2) funding allocations; 3) building the MTIP and technical evaluation; 4) public comment; and 5) adoption.

The 2027-2030 MTIP comprises of the funding allocation direction and decisions by Metro (metropolitan planning organization), ODOT (state department of transportation), TriMet and SMART (transit agencies). Each individual agency has its own specific work plan for their funding allocation processes (phase 2 of the MTIP development), which comprises of the majority of the

³ Metro and ODOT previously allocated transportation funding identified for federal fiscal year 2027 in the development of the 2024-2027 MTIP. Whereas transit agencies conduct their allocation process annually through their budget process.

MTIP development. In the third phase of the development of the MTIP the funding allocation decisions by each agency are compiled together to build the 2027-2030 MTIP public review draft. The public review draft is analyzed to assess the performance of the MTIP package relative to regional policy objectives, near-term investment priorities, and federal requirements.

While the various funding allocation processes are taking place during phase 2, Metro, as the metropolitan planning organization, will take responsibility in coordinating, sharing information (e.g., work plans), and engaging the key MTIP partners to understand how their selection processes have considered regional objectives. These coordination efforts help ensure TPAC remain informed and provide ample opportunity for input in the lead up to acting on the 2027-2030 MTIP in 2026.

Discussion Questions

1. Are there any questions or comments regarding the program direction for the 2027-2030 MTIP?
2. Are there any questions or comments regarding the 2027-2030 MTIP work program?

Next Steps

The following timeline has been provided to illustrate the immediate next steps for the 2027-2030 MTIP development.

Timeline – Upcoming 2027-2030 MTIP Development Activities

| Activity | Timeframe |
|--|----------------------------------|
| <i>Program Direction</i> | |
| TPAC and JPACT introduction to the program direction | February 2024 |
| Input and formation of the draft program direction | March – April 2024 |
| TPAC and JPACT recommendation to adopt program direction | Spring/early summer 2024 |
| <i>Funding Allocations</i> | |
| 2028-2030 Regional Flexible Fund program direction discussion and action | Early – Spring/early summer 2024 |
| ODOT funding allocations | 2024 through November 2025 |
| Transit agency annual budget process and investment program presentations | Spring 2024, 2025, 2026 |
| 2028-2030 Regional Flexible Fund – Step 2 – allocation process | Summer 2024 – Summer 2025 |
| <i>Packaging the 2027-2030 MTIP</i> | |
| Compilation of draft 2027-2030 MTIP investment program | Summer – end 2025 |
| Compilation of the public review draft of the 2027-2030 MTIP <ul style="list-style-type: none"> • System performance evaluation of MTIP investment program and RTP consistency analysis • MAP-21 performance target evaluation • Federal regulatory compliance demonstration • Allocation process discussion | January – March 2026 |
| Public comment on the public review draft 2027-2030 MTIP <ul style="list-style-type: none"> • Includes formal resource agency and tribal consultation | April – May 2026 |
| Preview 2027-2030 MTIP adoption draft at TPAC and JPACT | June 2026 |

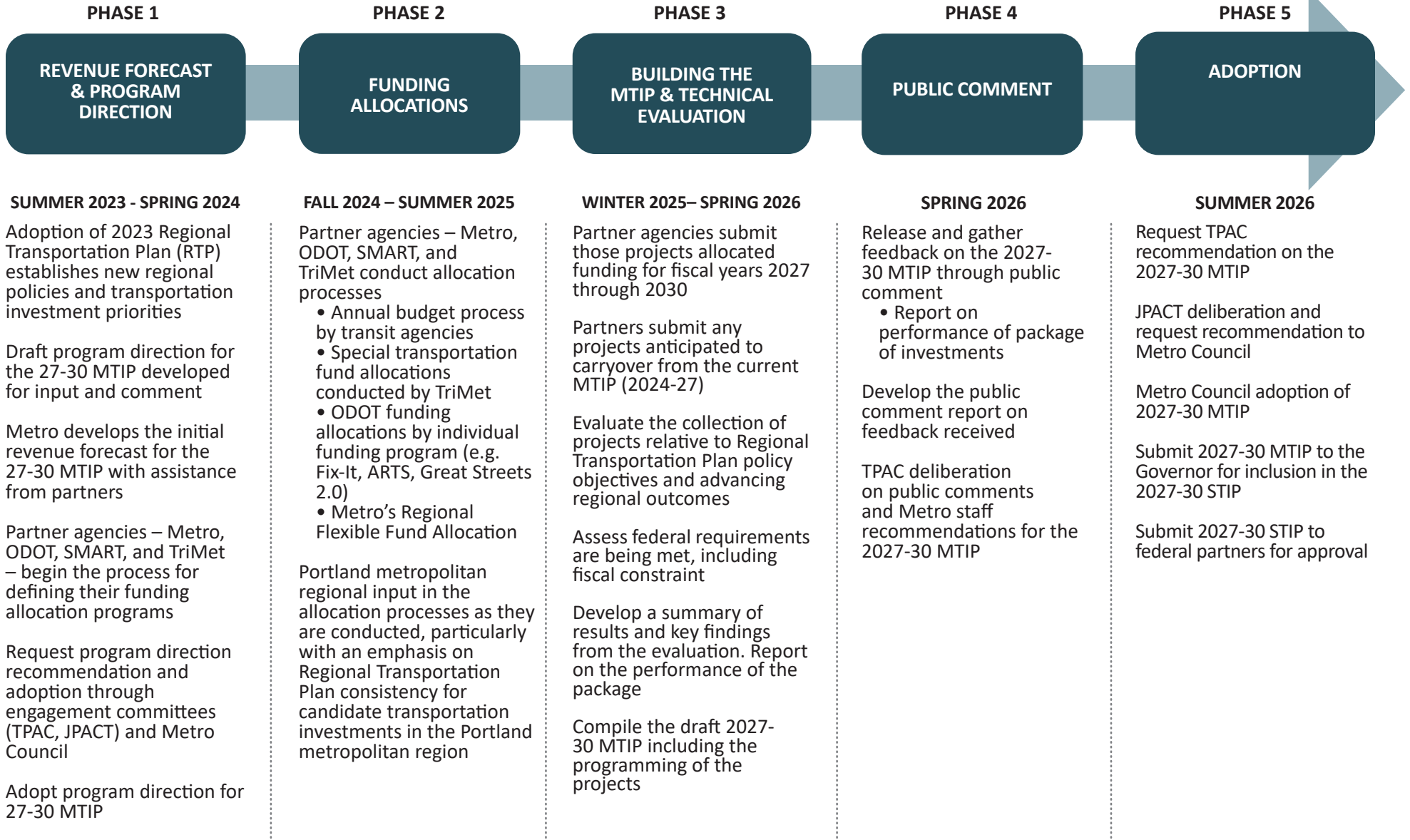
| | |
|---|-----------|
| <ul style="list-style-type: none"> • Bring forward public comment summary, findings, and recommendations | |
| Request TPAC recommendation for JPACT to approve the 2027-2030 MTIP | July 2026 |
| Request approval of the 2027-2030 MTIP by JPACT | July 2026 |
| Adoption of the 2021-2024 MTIP by the Metro Council | July 2026 |



2027-2030 MTIP WORK PLAN SUMMARY

Attachment 1

DRAFT



Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: Friday, January 26, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner
Ted Leybold, Resource Development Section Manager
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Schedule and Process Overview

Purpose

To introduce TPAC to the work program and outline the schedule of activities for the 2028-2030 Regional Flexible Funds Allocation (RFFA).

Background

The Regional Flexible Funds are federal surface transportation funds provided by the federal government to states, metropolitan planning organizations (MPOs), and local governments. Comprised primarily of two federal funding types – the Surface Transportation Block Grant (STBG) and Congestion Mitigation and Air Quality (CMAQ) – these federal transportation funds are typically distributed through funding formulas. As an MPO, Metro has funding authority to allocate federal transportation funds which it receives through funding formulas.¹

Allocation of these federal funds are part of Metro’s requirements as a federally designated MPO to carry out the metropolitan planning process.² Every three years, Metro begins a process to allocate the region’s allotment of federal funds – known as the Regional Flexible Funds allocation (RFFA). The RFFA process generally takes 18-20 months to complete. Projects selected in the RFFA process are to be ready for funding obligation during federal fiscal years 2028-2030 and will be included in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).³

The MTIP is a component of the State Transportation Improvement Program (STIP), the MTIP development timeline is driven largely by the Oregon Department of Transportation (ODOT) timeline for adopting the 2027-2030 STIP. This schedule calls for the draft STIP to be adopted by late spring/early summer 2026. To conform to this timeline, a draft MTIP document must be prepared no later than spring of 2026.

The drafted Regional Flexible Fund Allocation schedule calls for JPACT and Council to act at two key times: 1) for the adoption of the program direction, which is anticipated for late spring or early summer 2024; 2) for the adoption a RFFA investment package anticipated in summer 2025. Adhering to this timeline for the RFFA decisions are critical to meet the MTIP and the STIP development schedule.

Kick off of this process begins at the February 2nd TPAC meeting and runs through the summer of 2025.

¹ This is to distinguish that Metro does not receive federal transportation funding unless the funds are awarded to Metro through the Regional Flexible Fund allocation process, discretionary funding program or through another allocation of federal funds through a partner agency.

² Additional background on MPO requirements can be found at <https://www.transit.dot.gov/regulations-and-guidance/transportation-planning/metropolitan-planning-organization-mpo>

³ Federal fiscal years begin October 1 of the previous year (e.g. FFY 2028 covers 10/1/27 to 9/30/28)

Process & Schedule

Staff proposes to follow a multi-phased process similar to preceding RFFA cycles. Attachment 1 provides an At-A-Glance overview of the 2028-2030 RFFA process and schedule. Briefly, these phases include:

1. Program Direction development (February-Spring/Early Summer 2024) – This phase results in the JPACT-approved and Council-adopted priorities and program direction for how Regional Flexible Funds are to be spent to carry out policy objectives of the 2023 RTP. Engagement activities with Metro Council, TPAC, and JPACT will occur to discuss and gather input on operationalizing the RTP policy objectives, and priorities. Regional partner engagement is anticipated through the regular TPAC and JPACT meetings with the option for additional discussion at the TPAC workshops if needed.

Early work also begins on preparing for the Step 2 competitive project solicitation. Metro staff will be working on the initial project application, risk assessment and technical evaluation materials. While many details of the application will be dependent on the final program direction adopted by Council, as much work as possible will occur during this time to ensure the overall RFFA process remains on schedule. In addition, Metro staff will host a project delivery training series aimed at potential RFFA applicants. These trainings will take place at the TPAC workshops starting in February through August in efforts to help prepare local partners developing an application.

After the policy direction is adopted, Metro staff will finalize the Step 2 project application materials. A technical evaluation working group will also be formed and assist in finalizing the application materials. This work will occur during the summer 2024.

2. Call for projects (September-October 2024) – The Step 2 project call is scheduled to open in September 2024, with approximately two months allotted for applicants to prepare and submit their project proposals. A workshop to answer questions and provide further details on the RFFA process will be held just prior to or early in the project call.
3. Step 2 Project selection: nominations and deliberations (November 2024-Summer 2025) – Once the application window closes, work begins to evaluate and gather input on the submitted projects. There are four sources of input used to guide the project selection process:
 - a. Technical Evaluation – a group comprised of agency staff and technical advisors with relevant expertise will conduct a technical process to evaluate each project's performance at achieving policy outcomes as defined in the RTP and the RFFA Program Direction.
 - b. Risk Assessment – an independent analysis of each project to identify any impediments to the project scope, timeline or budget.
 - c. Public Comment – per Metro guidance, there will be a (minimum) 30-day public comment opportunity to gather input on the proposed projects and overall RFFA program from community members and interested parties.
 - d. Identification of Priorities – Each county coordinating committee and the City of Portland has the option to identify and prioritize which of the projects submitted from their respective jurisdictions are most critical to the needs of the community.

Applicants will have an opportunity to provide clarifying information to questions or issues identified by the risk assessment or respond to questions for additional or clarifying information by the technical evaluation work group. This information is to help inform the

public comment period and the county coordinating committee identification of priority projects.

Summary of applications will be provided to TPAC, JPACT, and Metro Council in early winter 2025 with the results of the evaluation and risk assessment available to share in early 2025. Following, a public comment period is anticipated to take place in late winter 2025.

4. Adoption of the 2028-2030 RFFA (Summer 2025) – Following public comment and the identification of priorities by the county coordinating committees and the City of Portland, members of TPAC in conjunction with Metro staff will look to formulate an allocation recommendation for deliberation by JPACT and the Metro Council. The aim is for a final allocation adopted by the Metro Council in summer 2025.
5. MTIP adoption (Fall 2026-Summer 2026) – Upon completion of the RFFA process, work commences on conducting the required analysis and documentation for adding the selected RFFA projects to the 2027-2030 MTIP. It is critical the RFFA process be completed by summer 2025 to stay on the MTIP development schedule. The MTIP is scheduled to be adopted in summer 2026 for inclusion in the 2027-2030 STIP.

Program Direction

The RFFA Program Direction documents how the flexible funds are to be spent to carry out the policy objectives of the adopted RTP. In December 2023, the Metro Council adopted the 2023 Regional Transportation Plan (RTP), which updated the vision, goals, and policies for the regional transportation system in the Portland metropolitan region. The 2023 RTP establishes the investment priorities to bring the envisioned regional transportation network to fruition.

The aim of the upcoming 2028-2030 RFFA cycle will be to prioritize and determine the near-term investments to implement the newly adopted RTP. The development of the Program Direction will define the details for directing the allocation process in a manner that implements the policy objectives and investment priorities of the RTP.

The 2025-2027 RFFA Program Direction serves as a starting point for the 2028-2030 RFFA Program Direction. Metro staff will provide an overview of the Program Direction from the last RFFA cycle and begin to collect feedback and input from regional partners and interested parties. With this feedback and incorporating other factors of consideration, such as federal eligibility requirements, previous funding commitments, and recognizing the Regional Flexible Funds as one of the few tools with flexibility for implementation, Metro staff will develop a draft updated Program Direction for TPAC's consideration and action. Similar to previous editions, the program direction will include regional policy direction relative to the flexible funding allocation, previously adopted RFFA investment guidance, descriptions of Step 1 investments, and eligibility, criteria, and selection process description for Step 2 project funding.

TPAC is responsible for developing a recommended Program Direction to submit to JPACT. TPAC is scheduled to make a recommendation action in spring/early summer 2024. JPACT is scheduled to act on the TPAC recommendation at the subsequent meeting. Through discussions to be held at TPAC and JPACT meetings this spring, Metro staff and TPAC will work together to recommend an update to the Program Direction.

Existing Two-Step RFFA Program Direction and Process

Since the 2014-2015 allocation cycle, the region has followed a two-step framework for how the flexible funds are allocated. Step 1 comprises of ongoing funding commitments to bond repayments the region made in previous RFFA cycles, as well as providing continued investment in RTP-

identified activities and investments that support federal, state, and regional requirements to build a multi-modal transportation system which looks to achieve the priorities and vision established in the RTP. Step 2, representing the balance of funding remaining after Step 1 commitments and obligations are met, is for capital projects selected through a competitive grant process.

Metro staff plans to continue the existing two-step framework for the 2028-2030 RFFA process the existing two-step funding framework. The region has made a commitment to repay bonds and has identified three region-wide programs as part of an overall transportation strategy identified in the RTP. Regional funds provide funding to conduct essential and required MPO functions, as well as providing staff capacity to lead regional planning initiatives. The 2028-2030 RFFA Program Direction begins with, at a minimum, Step 1 funding will continue to repay the bonds and maintain programs and regional planning work.

Carbon Reduction Program Funds (CRP) – Status

The most recent federal transportation reauthorization established new surface transportation funding programs, some of which were suballocated to metropolitan planning organizations – like Metro – to award to projects and programs. The Carbon Reduction Program is one of the new funding programs. Metro conducted an expedited allocation of the initial \$18.8 million of CRP apportionment in spring 2023 in efforts to have the awarded projects reflected in the Oregon Carbon Reduction Strategy submitted by ODOT to federal partners in winter 2023. The allocation of the CRP funds were directed by policies from the RTP, Climate Smart Strategy, the state Carbon Reduction Strategy, and federal eligibility rules.

In revenue projections for the 2027-2030 STIP, ODOT made the deliberate assumption funds from the Carbon Reduction Program will continue beyond the current federal transportation authorization. The rationale behind ODOT's assumptions for the continuation of CRP is because the federal transportation authorization embedded the program among the formula funding programs distributed across all states and metropolitan areas. As a result, the next reauthorization would require additional efforts to eliminate the program. Combined with the historical trend of Congress typically extending the current authorization through continuing resolutions as congressional leadership negotiate a new surface transportation reauthorization, ODOT's assumption is CRP funds are reasonably expected to be made available.

The rationale outlined through ODOT's assumptions gives Metro confidence to assume the continuation of CRP funds through 2030. Because Metro does not have the same ability as the state to allocate new revenues to projects in a quick manner as they emerge, Metro will conduct a second round allocation of CRP funds. Metro staff considered whether to fold CRP funds into the RFFA process but recommends a separate but coordinated allocation process with the RFFA. This will manage risk in the event the program does not continue in the next surface transportation reauthorization or is funded at a significantly reduced amount. It also allows for a narrower direction on the allocation of these funds consistent with their unique federal policy purpose and eligibility requirements. Metro staff will bring forward a more detailed proposal for the CRP allocation process at a future date.

Next Steps/Upcoming Activities

The following table outlines a few upcoming Regional Flexible Fund Allocation activities. The table is not comprehensive.

2028-2030 Regional Flexible Fund Allocation – Schedule of Near-Term Activities

| Activity | Date | Where |
|--|-------------|---------------|
| Project delivery training series – kick off/overview | February 14 | TPAC workshop |

| | | |
|---|------------------------|---------------|
| Overview of region-wide programs and select capital projects funded through previous RFFA cycles | February 14 & April 10 | TPAC workshop |
| 28-30 RFFA – Kick off, introduction, and initial input | February 15 | JPACT |
| Summary of previous RFFA cycle program direction and summary of initial feedback to date; collect input | March 1 | TPAC meeting |
| Briefings with interested parties (requested) | On-going | TBD |

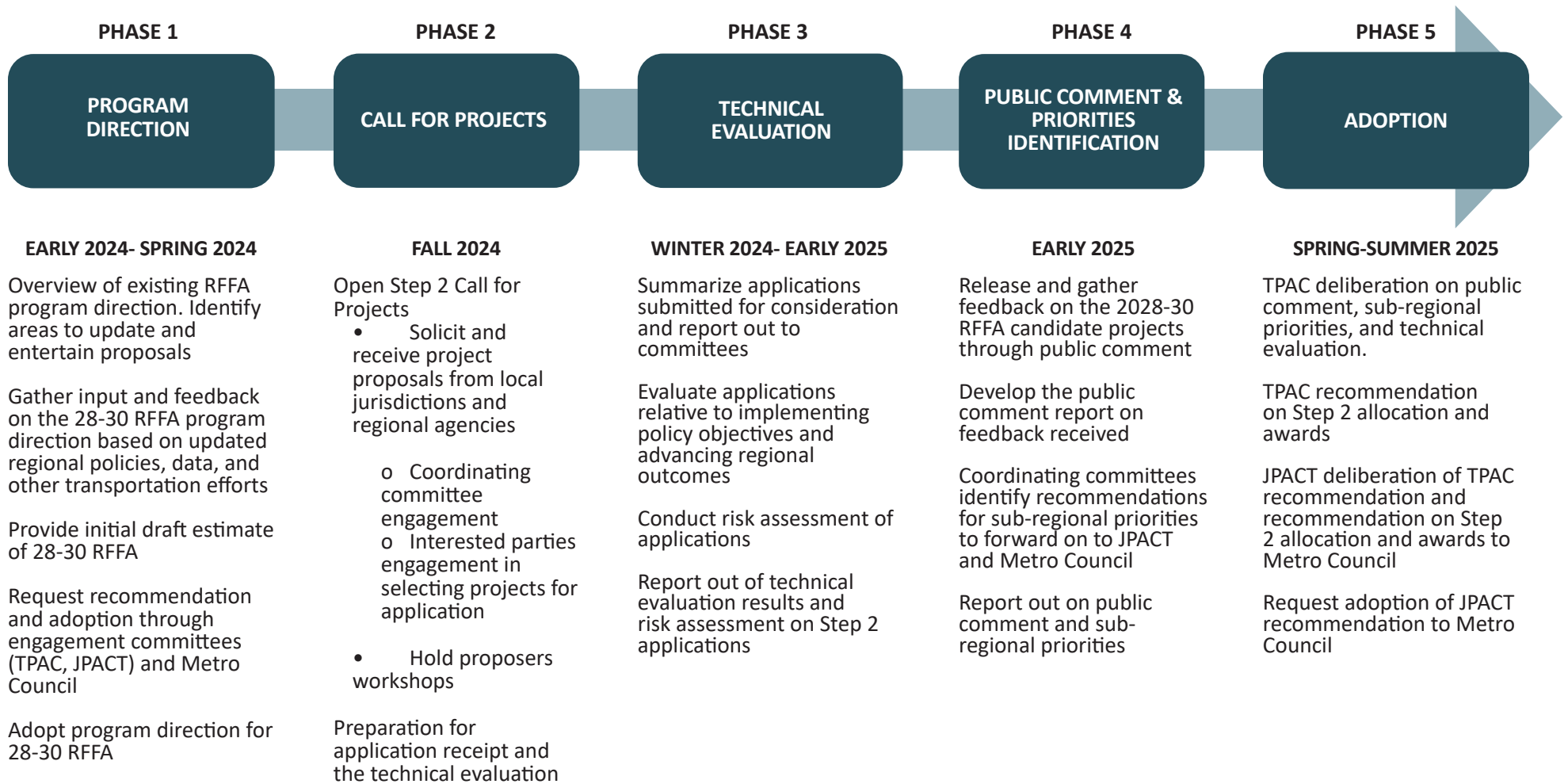
Question for TPAC

- 1) What questions does TPAC have in regard to the process and schedule for the 2028-2030 Regional Flexible Fund allocation?
- 2) Does TPAC desire to have a specific workshop focused on the Regional Flexible Fund allocation program direction? If so, what specific items would TPAC members like to discuss or address?
- 3) What initial input do TPAC members have on the 2028-2030 RFFA Program Direction?
- 4) Do the county coordinating committees and/or the City of Portland want briefings on the 2028-2030 Regional Flexible Fund Allocation?



Attachment 1

2028-2030 REGIONAL FLEXIBLE FUND ALLOCATION work plan summary at-a-glance



DELIVERABLES

Adopted 2028-30 RFFA Program Direction

Application materials packet

Technical evaluation and risk assessment results of applications in consideration

Public comment report on the 2028-30 RFFA

Identification of sub-regional priorities

Adopted 2028-30 RFFA

Materials following this page were distributed at the meeting.

January traffic deaths in Clackamas, Multnomah and Washington counties*

Jesse James Loyer, 32, motorcycling, 5900 Blk SE 82nd Ave., Portland, Multnomah, 1/1

Shui E. Yuan, 84, walking, NE 65th Ave/ NE Sandy , Portland, Multnomah, 1/23

Unidentified, driving, 1900 Blk N Rose Parks Way, Portland, Multnomah, 1/24

Alejandro Rivera, 48, walking, I-205, Clackamas, 1/27

Unidentified, walking, SW Beaverton-Hillsdale Hwy/SW 56th Ave, Portland, Multnomah, 1/27

Unidentified, walking, Burnside/N Main Ave, Gresham, Multnomah, 1/29

**ODOT initial fatal crash report as of 2/1/24,
news and police reports – all information is
preliminary and subject to change*





Metro

TPAC Agenda Item

February 2024 Formal MTIP Amendment

Resolution 24-5384

Amendment # FB24-05-FEB

Applies to the 2024-27 MTIP

Agenda Support Materials:

- Draft Resolution 24-5384
- Exhibit A to Resolution 24-5384 (MTIP Worksheets)
- Staff Narrative: No attachments

February 2, 2024

Metropolitan Transportation
Improvement Program

Ken Lobeck
Metro Funding Programs Lead

February 2024 Formal MTIP Amendment

Adding and Amending 7 Projects

FFY = Federal Fiscal Year: July 1st to September 30th

- 7 projects in the February 2024-27 bundle:
 - Adding 3 new projects
 - Amending 4 existing projects:
 - 2 ODOT existing projects with cost adjustments
 - 2 TriMet projects adding funds

February 2024 Formal MTIP Amendment

FFY = Federal Fiscal Year: July 1st to September 30th

- Cover briefly and open for discussion
- Seek approval recommendation to JPACT for Resolution 24-5384
- Staff Recommendation:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 24-5384 to add and amend the seven projects to the 2024-27 MTIP

February 2024 Formal MTIP Amendment

ODOT Existing Project Amendments

FFY = Federal Fiscal Year: July 1st to September 30th

| Key | Name | Action | Net Changes |
|-------|--|---|---|
| 22551 | Lead Agency: ODOT US26: SE Powell Blvd & SE 36th Ave (Safety upgrade project) | <u>COST INCREASE:</u> Add State HB2017 funds to support PE, ROW, and construction phase cost increases. | Addresses phase cost increases. The cost increase is \$782k to project. |
| 22322 | Lead Agency: ODOT Oregon Transportation Network - TriMet FFY23 | <u>FUNDING DECREASE:</u> The eligible State STBG is reduced. The STBG reduction totals \$2,461,508 | The project is a transit focused project grouping bucket. The funding source is from the ODOT Public Transit Division |

February 2024 Formal MTIP Amendment

TriMet Existing Project Amendments

FFY = Federal Fiscal Year: July 1st to September 30th

| Key | Name | Action | Net Changes |
|-------|---|---|---|
| 23189 | Lead Agency: TriMet Enhanced Seniors Mobility/Individuals w/Disabilities (2026) | <u>ADD FUNDS:</u> Update 5310 estimates and add Local overmatch funding to the project for 2026 | Adding overmatch exceeds 30% threshold for cost changes |
| 20329 | Lead Agency: TriMet Enhanced Seniors Mobility/Individuals w/Disabilities (2027) | <u>ADD FUNDS:</u> Update 5310 estimates and add Local overmatch funding to the project for 2027 | |

5310 = FTA Section 5310: FTA's program are services that focus on the elderly and persons with disabilities

February FFY 2024 Formal MTIP Amendment

New Project Additions to the MTIP and STIP

FFY = Federal Fiscal Year: July 1st to September 30th

| Key | Name | Action | Federal Award |
|------------------------------------|---|--|---|
| 23541 <i>New Project</i> | Lead Agency: ODOT Oregon Transportation Network - Ride Connection | Add new Public Transit Division's project grouping bucket supporting rideshare related activities. Future specific projects to be split off and programmed individually as they are awarded. | \$1,979,194 award of ODOT managed federal Surface Transportation Block Grant (STBG) funds |

February FFY 2024 Formal MTIP Amendment

New Project Additions to the MTIP and STIP

FFY = Federal Fiscal Year: July 1st to September 30th

| Key | Name | Action | Federal Award |
|------------|--|---|---|
| New | Lead Agency: TriMet TriMet Line 33 Traffic Signal Priority Upgrade | Adds the Metro awarded CRP funded project to the MTIP/STIP to support the development and implementation of a Transit Signal Prioritization upgrade along Line 33 (along McLoughlin Blvd) | Metro Carbon Reduction Program (CRP) award totals \$4,000,000 |

Exhibit A to Staff Report of Resolution 23-5337
Project Allocation List and Project Descriptions

| TPAC Recommended Investment Package | |
|---|--------------|
| Tualatin Valley Highway Bus Rapid Transit | \$5,000,000 |
| 82nd Avenue Bus Rapid Transit | \$5,000,000 |
| Line 33 McLoughlin Transit Signal Priority | \$4,000,000 |
| Climate Smart Implementation Program | \$1,800,000 |
| Transportation System Management & Operations | \$3,000,000 |
| Subtotal: | \$18,800,000 |

February FFY 2024 Formal MTIP Amendment

New Project Additions to the MTIP

FFY = Federal Fiscal Year: July 1st to September 30th

| Key | Name | Action | Federal Award |
|------------------------------------|---|---|--|
| 23580 <i>New Project</i> | Lead Agency: TriMet 82nd Ave Bus Rapid Transit Project Development: PDX - Sunnyside Ave | Adds the TriMet project development project supporting engineering requirements through NEPA and final design to help secure a later FTA Capital Improvements Program Small Starts grant. | \$5 million ODOT STBG contribution plus overmatching local funds totaling \$23.3 million |

Note: Project development requirements will be complete via a 2-project approach:

- Metro's project development supporting project in Key 23589 (submitted in January) with \$6 million of federal Carbon funds plus match.
- TriMet's 82nd Ave BRT project development version with \$23.3million.
- Together, the total project development phase cost is estimated at about \$30 million.

MPO CFR Compliance Requirements

MTIP Amendment Review Factors

CFR = Code of Federal Regulations

- ✓ Project must be included in and consistent with the current constrained Regional Transportation Plan
- ✓ Passes fiscal constraint review and proof of funding verification
- ✓ Passes RTP consistency review:
 - Reviewed for possible air quality impacts
 - Verified as a Regionally Significant project status
 - Verified RTP and MTIP project costs consistent
 - Satisfies RTP goals and strategies
- ✓ MTIP & STIP programming consistency is maintained against obligations.
- ✓ Passes MPO responsibilities verification
- ✓ Completed public notification requirement
- ✓ Examined how performance measurements may apply and if initial impact assessments are required

February 2024 Formal Amendment

Proposed Approval Timing

| Action | Target Date |
|--|--------------------------|
| Start 30-day Public Notification/Comment Period | January 30, 2024 |
| TPAC Notification and Approval Recommendation | February 2 , 2024 |
| JPACT Approval and Recommendation to Council | February 15, 2024 |
| End 30-day Public Notification/Comment Period | February 28, 2024 |
| Metro Council Approval | February 29, 2024 |
| Final Estimated Approvals | Early April 2024 |

February 2024 Formal MTIP Amendment Discussion, Questions, and Approval Request

- Open up for discussion and questions
- Approval request includes completing any necessary corrections
- Staff Approval Request:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 24-5384 to add and amend the seven projects to the 2024-27 MTIP



Metro



RDPO

February 2, 2024

REGIONAL EMERGENCY TRANSPORTATION ROUTES (RETR) PHASE 2

Purpose

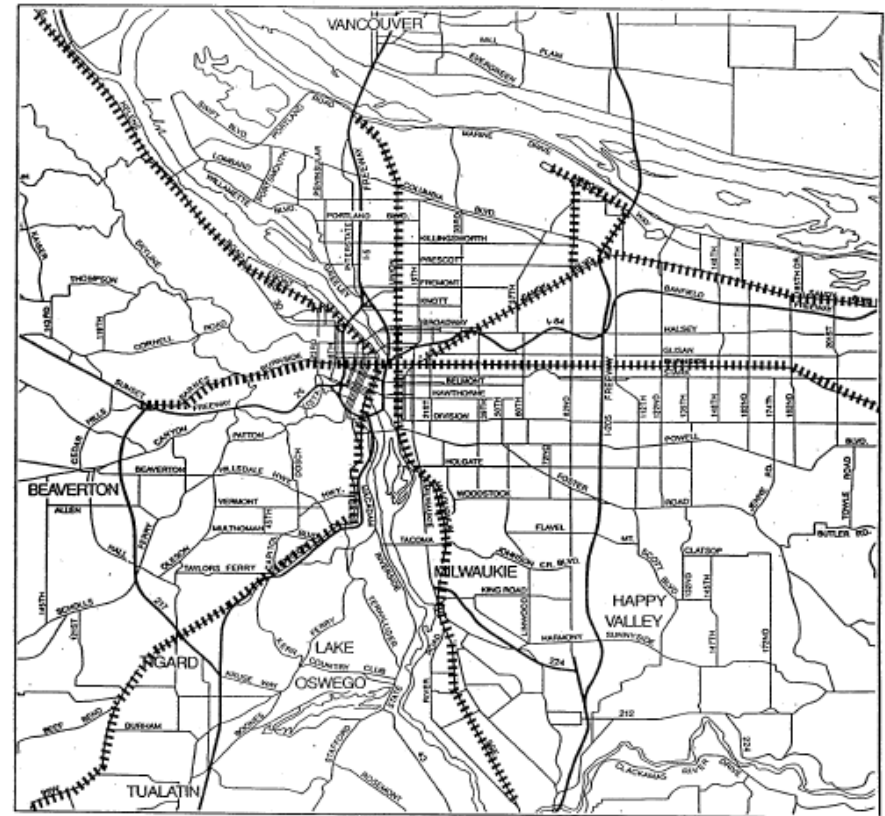
1. Share overview of RETR Phase 2
2. Recruit potential candidates for project workgroup



A brief history of regional ETRs

- Metro formed multi-jurisdictional policy group in 1993 – **Regional Emergency Management Group (REMG)**
- coordination focused on emergency response, preparedness and earthquake hazard mitigation
- REMG identified emergency lifeline corridors in 1994

Burnside/Barnes/US 26, US 30, 99E, 99W/Barbur, Sandy and Airport Way



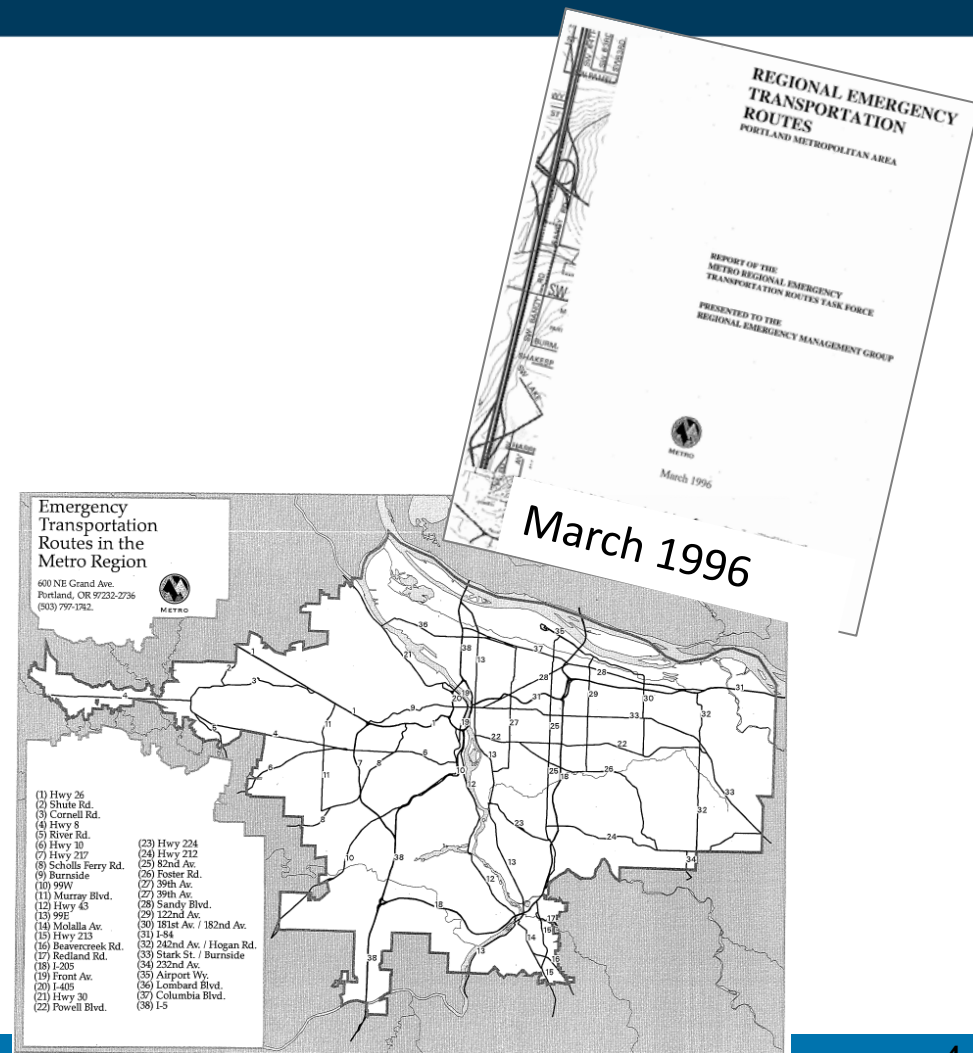
Designated Emergency Lifeline Corridors (1994)

Regional emergency transportation routes identified in 1996

Original ETRs defined as priority routes targeted during an emergency for:

- rapid damage assessment
- debris clearance
- life-saving and life-sustaining response activities

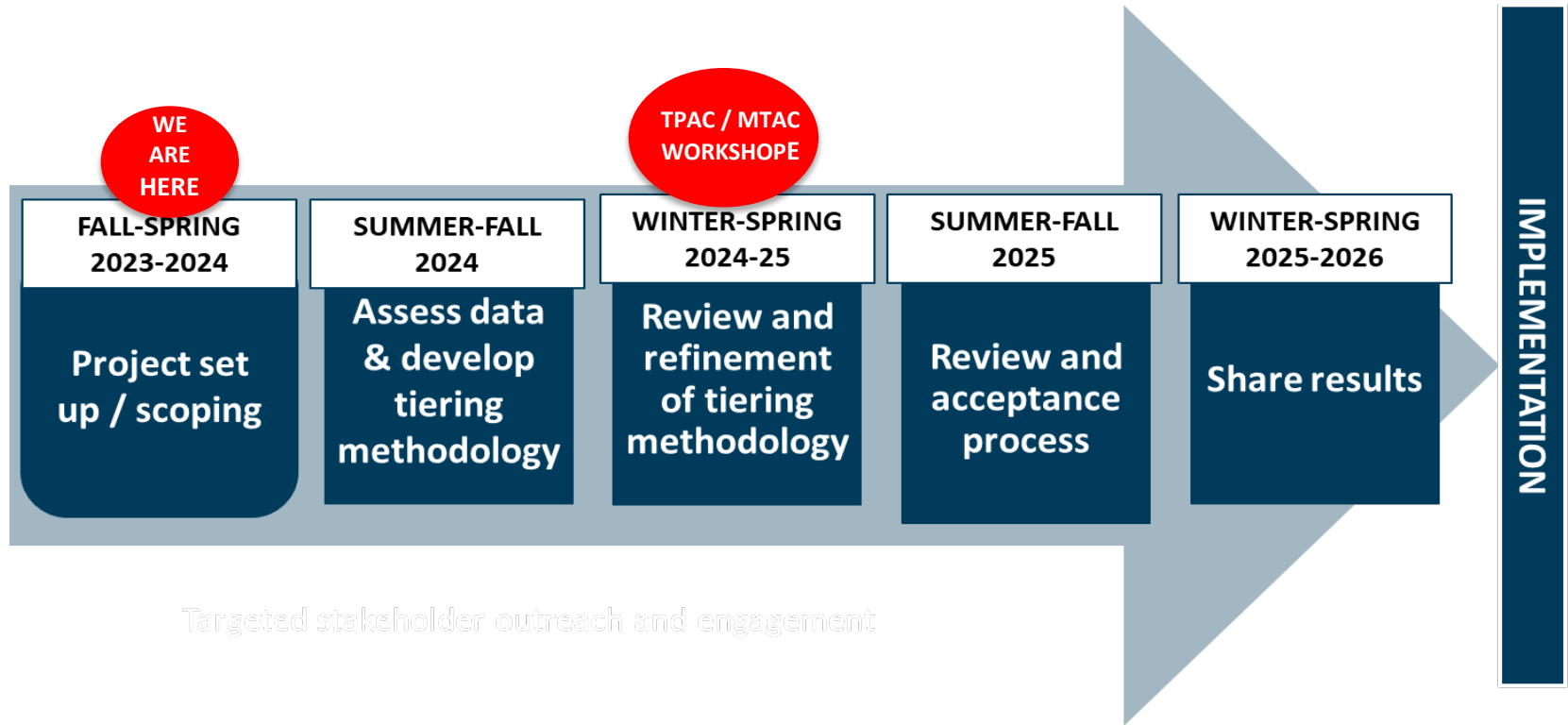
Priorities for mitigation



Project Overview

- Phase 1 work (2019 – 2021) updated the network in 5-county region
- Phase 2 work (2024 – 2026) (Identified in RTP ch.8)
 - Prioritize and tier network routes
 - Data review and assessment
 - Workshops and engagement
 - Develop and apply methodology
 - Conduct desk research on operational guidelines
- Out of scope - evacuation plan, establishing operational guidelines, funding decision

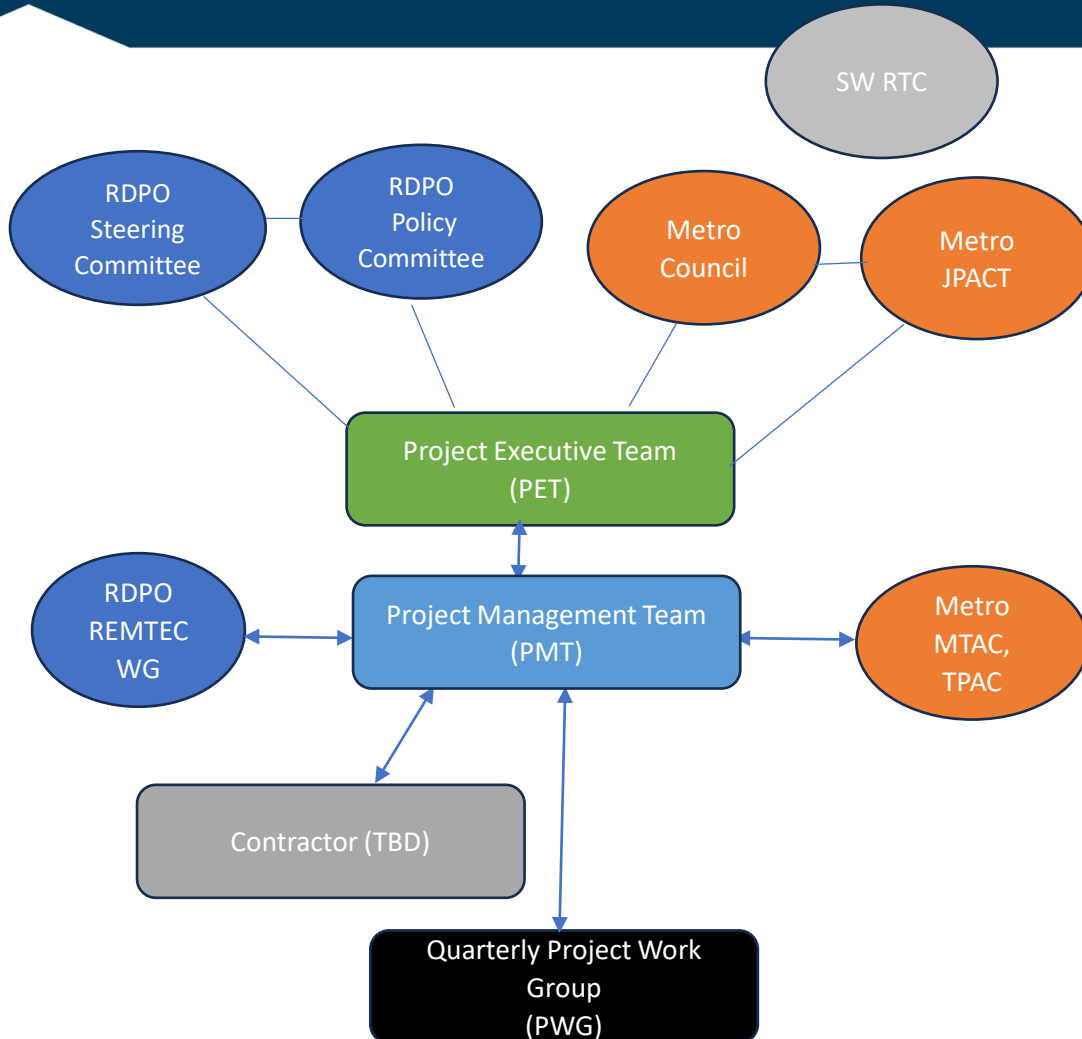
Project Timeline



Engagement Approach

- Quarterly project work group
- Hold regional workshops to develop and refine prioritization criteria
- Engage Community Based Organizations to get input from vulnerable populations
- Briefings to technical and policy groups at Metro – (TPAC ,MTAC, JPACT, Council), and RDPO

Decision-making



Next Steps (February – April)

- RDPO and Metro finalize sub-recipient agreement
- Briefings to TPAC, MTAC, RDPO work groups to spread word
- Recruit a project work group of regional partners to meet quarterly
- Select consultant

What do we need from TPAC?

- Spread the word about this project to your colleagues
- Send in names for candidates to serve on quarterly work group to:
john.mermin@oregonmetro.gov



2027-30 MTIP Revenue Forecast

Initial Draft

February 2, 2024

MTIP Financial Forecast

- Required element of the MTIP process
- Provides overall funding context for upcoming allocation processes and decisions
- Not a commitment of funds to allocation programs or specific projects
- Expected federal and state generated revenues only

Summary of forecast

| | 2027 | 2028 | 2029 | 2030 | Total |
|---|---------------------|----------|----------|----------|-------------------|
| ODOT Directed ¹ | N/A ^{4, 7} | \$149.83 | \$149.83 | \$149.83 | \$449.5 |
| State Trust Fund to Cities/Counties ⁵ | \$248.0 | \$248.22 | \$251.77 | \$257.56 | \$1,055.55 |
| Federal Discretionary ⁹ | N/A | \$20.0 | \$20.0 | \$20.0 | \$60.0 |
| Metro MPO ^{1,3, 6, 8} | \$3.86 | \$54.9 | \$54.9 | \$54.9 | \$168.7 |
| SMART | \$3.31 | \$3.50 | \$3.71 | \$3.94 | \$14.46 |
| TriMet | \$112.0 | \$115.8 | \$119.9 | \$124.0 | \$471.7 |
| Sub-Total | \$119.17 | \$344.03 | \$348.34 | \$352.67 | \$1,164.21 |
| Total | \$367.17 | \$592.25 | \$600.11 | \$610.23 | \$2,169.76 |

Top line findings

- A little over **\$1.1 billion** of revenue estimated for the region
 - Fairly consistent in what was programmed for 24-27 and 21-24 MTIP cycles
- Invests across all parts of the transportation system
- Federal and state revenues are constrained

Revenue Forecast Caveats

- Tolling and/or future pricing program revenues not included
 - Revenue forecast to be updated with tolling and/or pricing revenues in the future



Revenue Forecast Caveats

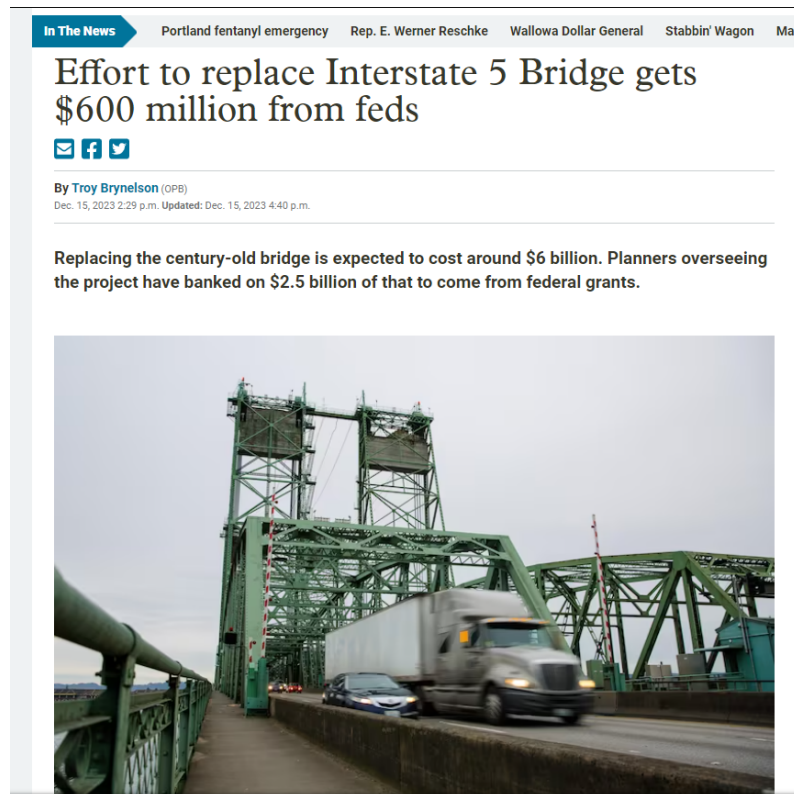
- Not all revenues included in MTIP
 - E.g., local gas taxes, SDCs, MSTIP



The screenshot shows the Washington County Oregon website. The header includes the Washington County Oregon logo, a 'Español Translate' button, and a navigation menu with 'Community', 'Businesses', 'Departments', 'Priorities', 'Government', and 'Search'. The main content area has a breadcrumb trail: 'Home > Land Use and Transportation > Transportation Funding'. The title is 'Major Streets Transportation Improvement Program (MSTIP)'. Below the title is a paragraph: 'MSTIP is a county-wide program that has paid for more than 150 projects in Washington County and the cities within Washington County.' To the right of the text is an illustration of a document roll, a bar chart, a pie chart, a line graph, a dollar sign, and a calculator.

Revenue Forecast Caveats

- Federal discretionary does not include any anticipated awards for Portland area major projects



Next Steps

Funding Allocations

- 28-30 ODOT funding programs – Began in Fall 2024
- 28-30 RFFA – Kick off February 2024

TPAC updates

- ODOT programs – workshops
- RFFA – at key milestones
- Transit – annual (spring)

oregonmetro.gov



2027-2030 Metropolitan Transportation Improvement Program (MTIP)

Presentation to TPAC
February 2, 2024



Metro



Today's purpose

- Background
- MTIP Program Direction
- Next steps



Metro

Background

MTIP Basics: Purpose & Function

MTIP – Three Components

- Regionally significant projects scheduled to receive funds
 - Reflects process to select investments which advance regional goals
- Compliance with federal regulations
- Monitoring project delivery and fiscal constraint



Three Metropolitan Planning Organization (MPO) functions

1. Maintain Regional Transportation Plan (RTP)
2. **Develop Metropolitan Transportation Improvement Program (MTIP)**
 - Allocate RFFA funding, coordinate on ODOT and transit administered funding
3. Develop annual planning work plan (UPWP)

2023 RTP directs the 27-30 MTIP



27-30 MTIP “Project List”

- Metro RFFA Project 2
- ODOT Community Paths Project 3
- TriMet Formula Fund Project 1
- SMART Formula Fund Project 4

MTIP Key Partners – Portland Area MTIP

Interstate
Bridge
Replacement

Urban
Mobility
Office

Region 1

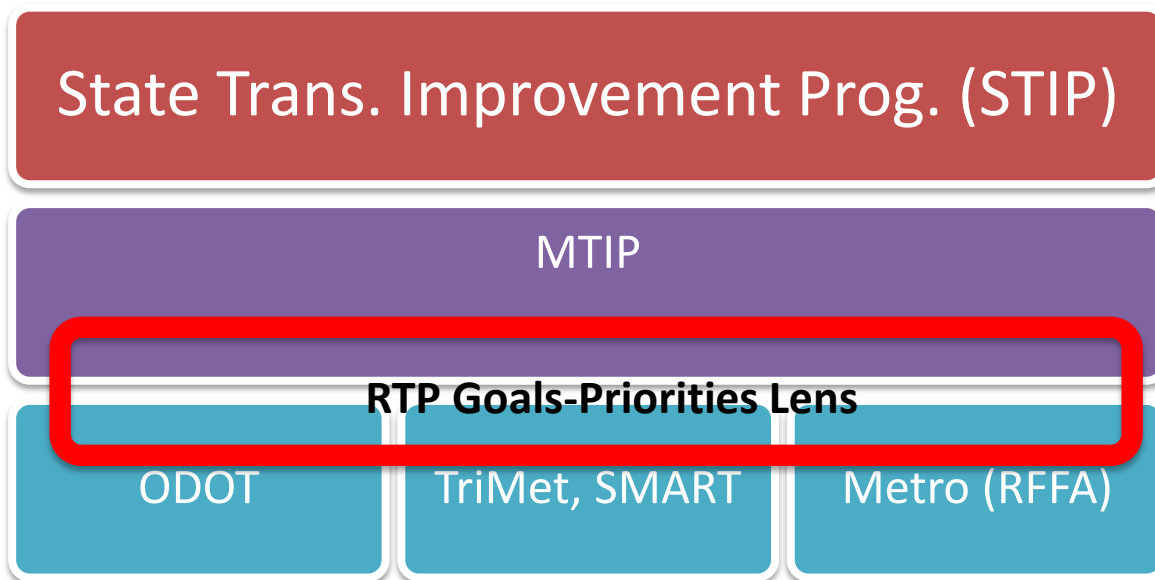
Statewide
Programs



RTP & MTIP/STIP relationship

STIP is comprised of all MTIPs + non-MPO projects

MTIP is comprised of the funding allocation processes by ODOT, transit agencies and MPO. Projects are from RTP Constrained list.





Metro

27-30 MTIP Program Direction process

MTIP roles and responsibilities

Metro staff

- Process
- Analysis
- Maintain coordination w/key MTIP partners

MTIP Partners

- Process
- Coordinate
- Cooperatively develop
- Maintain eligibility

TPAC/JPACT

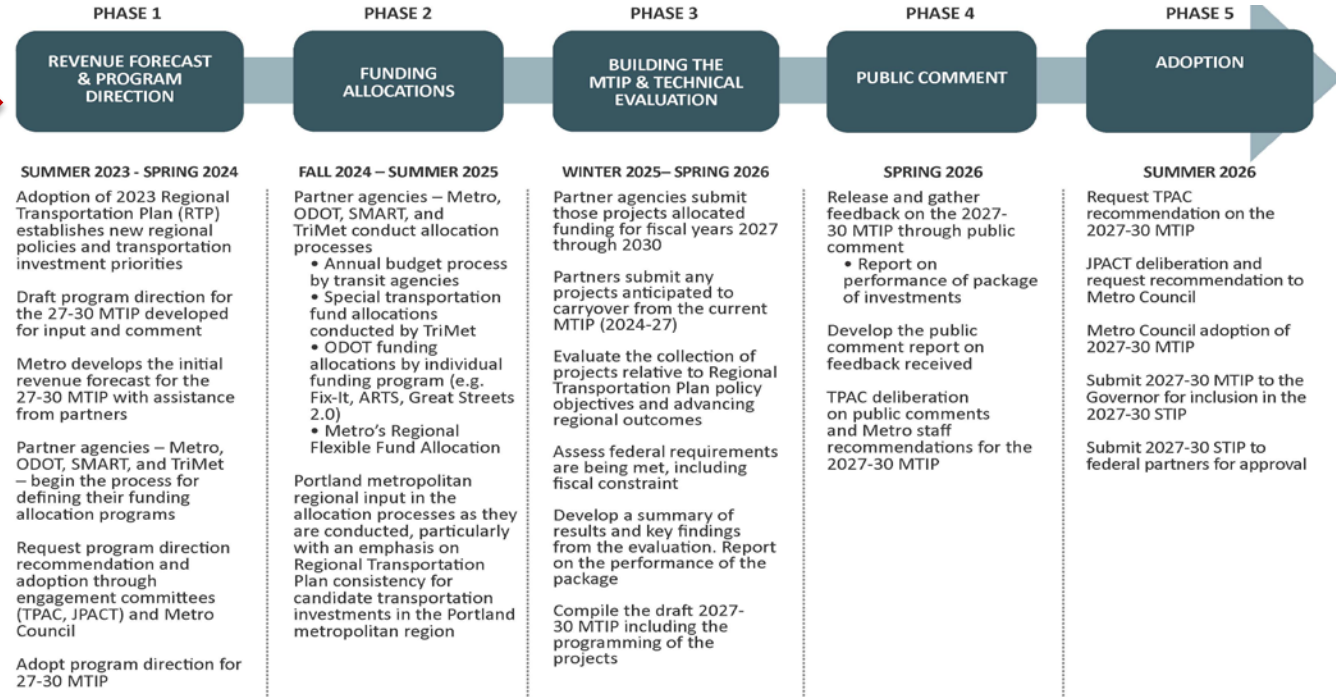
- Input
- Consider
- TPAC recommends
- JPACT approves & recommends

Metro Council

- Input
- Provide direction
- Adopt recommendation

2027-30 MTIP Process

We are here 



2027-30 MTIP process

Program Direction: Feb.-Spring/Early Summer 2024

Revenue forecast

Form draft program direction

TPAC & JPACT recommends,
Council adoption

Project Selection: 2024- Fall 2025

Project selection

Staying informed

Public comment and regional
input

Adopt Draft MTIP: Spring-Summer 2025

Performance evaluation,
compliance documentation

Public comment

TPAC & JPACT, recommends
Council adoption

MTIP Program Direction

- States Portland region's expectations when considering/making investments on regional transportation system
- Reaffirms federal objectives for the MTIP
- Outlines regional funding strategy (interim)

2027-30 MTIP Program Direction framework

Federal Regulations & RTP Consistency

- Fiscal constraint & federal rules compliance
- Consultation & Public involvement
- Advancement of RTP goals and policy objectives
- Performance evaluation and Performance Based Planning

Interim Regional Funding Approach

- Regional strategy to achieve multiple objectives
 - Maintaining & operating existing system
 - Advance RTP outcomes (e.g., safe system, mobility options)
- Positioning and leverage funding opportunities
- Guide investment for build out of the system

MTIP Program Direction development

Gather input

- Feb. – April
- Council input
- Discussions at TPAC and JPACT
- Form staff recommendation

TPAC, JPACT discussion

- May – June
- Discuss staff recommendation
- TPAC recommendation
- JPACT action

Council adoption

- June
- Council adoption of JPACT-approved program direction



Metro

Next steps

Immediate next steps

- Gathering TPAC and JPACT input
- Summarize input received
- Form program direction recommendation
- Next TPAC presentation: TBD
 - Likely April TPAC meeting

Today's discussion questions:

- Questions on MTIP program direction process and schedule?
- Understanding of RTP, MTIP, STIP coordination?

Thanks!

Contact: Grace Cho
grace.cho@oregonmetro.gov

oregonmetro.gov/mtip



Metro

Arts and events
Garbage and recycling
Land and transportation
Oregon Zoo
Parks and nature

oregonmetro.gov

2028-2030 Regional Flexible Funds Allocation (RFFA)

Presentation to TPAC
February 2, 2024



Metro



Today's purpose

- Background
- RFFA process
- Next steps



Metro

Background

What are Regional Flexible Funds?

- Federal transportation dollars allocated to each Metropolitan Planning Organization (MPO)
- Surface Transportation Block Grant (STBG), Congestion Mitigation & Air Quality (CMAQ)
- ~5% of all transportation funding in region
- Approximately \$152M allocated in 2025-27

Four MPO functions

1. Maintain Regional Transportation Plan (RTP)
2. Develop Metropolitan Transportation Improvement Program (MTIP)
3. Allocate funding through an open process (RFFA)
4. Develop annual planning work plan (UPWP)

2023 RTP



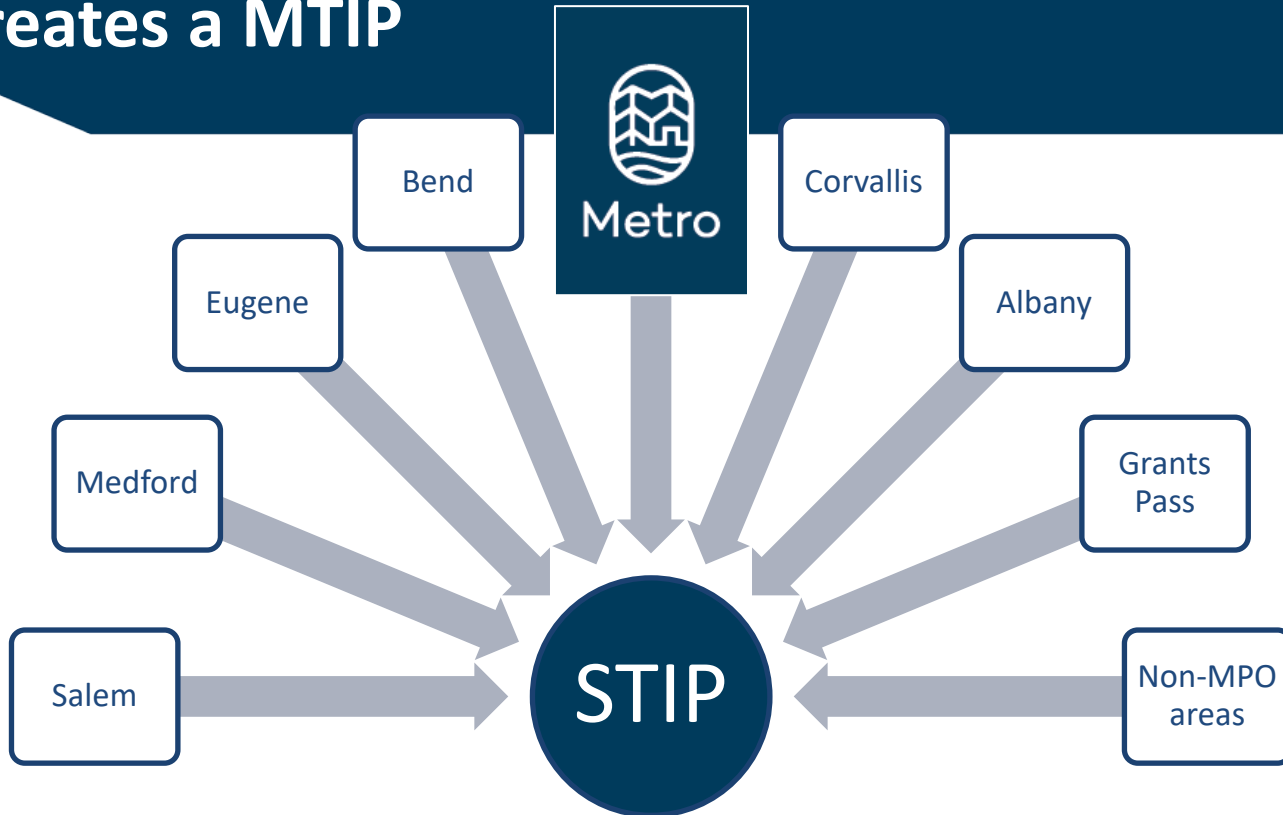
PUBLIC REVIEW DRAFT
**2023 Regional
Transportation Plan**

*A blueprint for the future of transportation in
the greater Portland region*

July 10, 2023

oregonmetro.gov/rtp

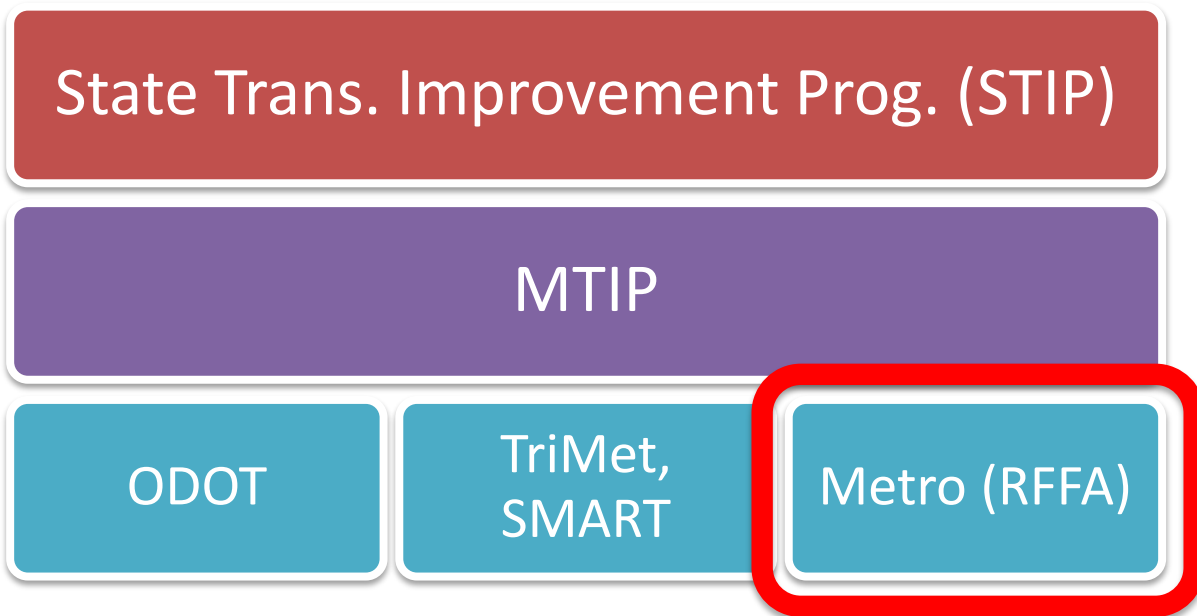
Each MPO coordinates fund allocation & creates a MTIP



RFFA/MTIP/STIP relationship

STIP is comprised of all MTIPs + non-MPO projects

MTIP is comprised of three funding allocation processes by ODOT, transit agencies and MPO. Projects are from RTP Constrained list.





Metro

RFFA process

RFFA roles and responsibilities

Metro staff

- Process
- Analysis
- Gather and synthesize input
- Form alternatives

TPAC/JPACT

- Input
- Consider
- TPAC recommends
- JPACT approves and recommends

Metro Council

- Input
- Provide direction
- Adopt recommendation

2028-30 RFFA process

Program Direction:
Feb.-Spring/Early
Summer 2024

TPAC, TPAC
workshops

TPAC
recommendation

JPACT, Council
adoption

Step 2 Project Selection:
Sept. 2024-Spring 2025

Proposals due in
November

Technical analysis

Risk assessment

Adopt Final RFFA:
Spring-Summer 2025

Public comment,
CCC priorities

TPAC
recommendation

JPACT, Council
adoption

RFFA Program Direction development

- Region's intent of how to target regional funds to achieve RTP priorities
- Sets objectives for allocation process
- Defines funding categories, amounts (Steps 1 & 2)



2025-2027 Regional
Flexible Funds Allocation
Program Direction

(Resolution 21-5194)

Adopted by Metro Council: September 9, 2021

2028-2030 RFFA Program

Direction framework

Step 1 (ongoing investments & bond payments)

- Project development and construction bonds
- Regionwide transportation investments
- MPO, Corridor & System planning

Step 2 (capital projects)

- Advance 2023 RTP Goals
 - Safe System, Equitable Transportation, Climate Action
 - Mobility Options, Thriving Economy
- Topical or geographic focused investments
- Regional scale impact, leverage funding, positioning

RFFA Program Direction development

Gather input

- Feb. – April
- Council input
- Discussions at TPAC and JPACT
- Creation of program direction options

TPAC, JPACT discussion

- May – June
- Discussion of proposed options
- TPAC recommendation
- JPACT action

Council adoption

- June
- Council adoption of JPACT-approved program direction

Step 2 project proposals & evaluation

- Call for projects – completion of detailed project proposals
- Technical evaluation – measure of project's advancement of four investment priorities
- Risk assessment – looking at potential risks to cost, scope, timeline

Step 2 project proposals & evaluation



Call for projects

- Sept. – Nov. 2024
- 2 month window to develop proposals
- Applicant workshop early in process

Evaluation

- End 2024 – Feb. 2025
- Technical evaluation of project outcomes
- Risk assessment (cost, scope, time)

Final adoption of 2028-30 RFFA

- 30-day public comment period
- County coordinating committees may indicate which projects are their priorities
- TPAC and JPACT discussions
- TPAC recommendation, JPACT action
- Council adoption

Final adoption of 2028-30 RFFA

Gathering input

- Feb. – Mar. 2025
- 30-day public comment period
- Coordinating committee priorities

Discussion & adoption

- Apr. – July 2025
- TPAC, JPACT discussions
- TPAC recommendation
- JPACT action
- Council adoption

Carbon Reduction Program

- Preparing for continuation of program
- Separate process to mitigate risk in case the program does not get reauthorized
 - To the degree possible, will coordinate with RFFA
- Proposal to be brought forward at later date



Metro

Next steps

Immediate next steps

- Gathering TPAC and JPACT input
 - Opportunity today and March meeting
 - Upcoming JPACT meeting
- Summarize input received
 - Includes Council input
 - Includes TPAC and JPACT input
- Next TPAC presentation: March 1

Today's discussion questions:

- Questions on RFFA process and schedule?
- Understanding of RFFA, MTIP, RTP coordination?
- Initial input on RFFA Program Direction?
- Coordinating committees briefings?

Thanks!

Contact: Grace Cho
grace.cho@oregonmetro.gov

oregonmetro.gov/rffa



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