

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE 2027-	)	RESOLUTION NO. 24-5418
2030 METROPOLITAN TRANSPORTATION	)	
IMPROVEMENT PROGRAM PROGRAM	)	Introduced by Chief Operating Officer
DIRECTION FOR THE PORTLAND	)	Marissa Madrigal in concurrence with
METROPOLITAN AREA	)	Council President Lynn Peterson
	)	

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP), which reports on the performance and programming of all federal surface transportation funds to be spent in the Portland metropolitan region, must be periodically updated in compliance with federal regulations; and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per Code of Federal Regulations Title 23 Section 450.300 and 450.340 to develop and implement a long-range metropolitan transportation plan and four-year investment program in a cooperative manner with the regions stakeholders; and

WHEREAS, the Metro Council and JPACT have developed a program direction defining how the region coordinates and cooperatively develops the 2027-2030 MTIP per federal regulations, which is represented by Exhibit A; and

WHEREAS, the Metro Council and JPACT adopted an updated Regional Transportation Plan in Fall 2023; and

WHEREAS, the three year process to 2023 RTP engaged stakeholders throughout to the region to develop the goals, objectives, and policies for the long-range transportation plan and the associated transportation investment priorities; and

WHEREAS, the adopted 2023 RTP specified five priorities to focus on in the near-term with the region’s transportation investments; and

WHEREAS, the updated MTIP program direction addresses expectations of the performance and programming of the Portland metropolitan region’s transportation investments for federal fiscal years 2027 through 2030; and

WHEREAS, the expectations outlined in 2027-2030 MTIP program direction are a continuation of existing policies and practices, but with minor updates and adjustments to reflect current adopted policies and funding programs; and

WHEREAS, the 2027-2030 MTIP program direction provides clarity as to the role of 2023 RTP and the 2023 RTP policy priorities will set policy foundation for transportation investment in the 2027-2030 MTIP; and

WHEREAS, the 2023 RTP policy priorities will inform the 2027-2030 MTIP performance-based programming and measuring MTIP progress; and

WHEREAS, input utilized from the extensive engagement as part of the 2023 RTP informed and shaped the 2027-2030 MTIP Program Direction; and

WHEREAS, input has been sought and received from the Transportation Policy Alternatives Committee as well as JPACT on the policy update; now therefore,

BE IT RESOLVED that the Metro Council adopt the 2027-2030 Metropolitan Transportation Improvement Program Program Direction.

ADOPTED by the Metro Council this 13th day of June 2024.



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Lynn Peterson, Council President

Approved as to Form:



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Carrie MacLaren, Metro Attorney

# 2027 – 2030

## Program Direction

*For the Metropolitan Transportation  
Improvement Program*

April 26, 2024

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**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.

**Project web site:** [oregonmetro.gov/mtip](https://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

The Metropolitan Transportation Improvement Program (MTIP) is a multipurpose, federally required document that tracks all federal transportation funding that is spent in the region as well as regionally significant projects that are state- and locally-funded. As a planning document, the MTIP demonstrates how near-term planned transportation projects advance the Portland metropolitan region's shared vision and goals for the transportation system, as adopted in the Regional Transportation Plan (RTP). The MTIP also demonstrates how these projects comply with federal regulations – such as fiscal constraint and public involvement. As a financial planning document, the MTIP outlines the implementation schedule of federally funded transportation projects in the region for the next four years and helps to manage the delivery of transportation projects. Lastly, as a monitoring tool, the MTIP is used to report on implementation of federal and regional transportation goals policies for the Portland metropolitan region during a four-year cycle.



*Adopted by the Joint Policy Advisory Committee on Transportation and the Metro Council in November 2023, the 2023 Regional Transportation Plan defines the region's shared vision and goals for the transportation system in the greater Portland area.*

## Purpose

The purpose of the 2027-2030 MTIP program direction is to provide clarity on the guiding direction for the investments to request inclusion as part of the 2027-2030 MTIP. The 2027-2030 MTIP program direction establishes the expectations among regional partners and guides federal and relevant state and local transportation investments proposed for federal fiscal years 2027 through 2030 in the metropolitan planning area. It does this by describing the policy priorities and outcomes transportation investments are expected to advance in support of the RTP. For those partners with responsibilities to administer federal transportation funds, the 2027-2030 MTIP program direction is a reaffirmation of the common goals and objectives the planned investments are expected to make progress towards while in their stewardship.

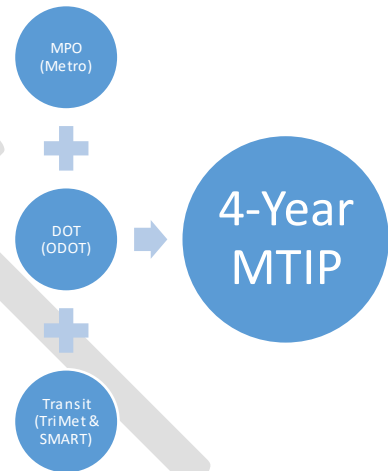
## MTIP Overview

*What is the Metropolitan Transportation Improvement Program (MTIP)? How is it created?*

The Metropolitan Transportation Improvement Program (MTIP) is a multipurpose, federally required document. As a planning document, the MTIP demonstrates how planned transportation projects advance the Portland metropolitan region's shared vision and goals for the transportation system as defined in the RTP and comply with federal regulations – such as fiscal constraint and public involvement.

A large component of the MTIP is the implementation schedule of federally funded transportation projects in the region for the next four years. The schedule information provides the management of project delivery of transportation projects and continually demonstrates fiscal constraint. In this function, the MTIP can be viewed as a financial planning and project delivery tool for the metropolitan region. As a tool, the MTIP assists in ensuring the region does not overspend and tracks the delivery of transportation projects.

The Federal-Aid Highway Act of 1962 established metropolitan planning organizations (MPOs), like Metro, to ensure regional cooperation in transportation based on a continuing, cooperative, and comprehensive (“3C”) planning process. MPOs conduct long-range planning and fund programming for the regional transportation system. For Metro, that means developing and implementing two planning and policy documents: the RTP and the MTIP. The RTP serves as the long-range transportation vision and policy document. It outlines the vision for the region’s urban transportation system, establishes goals and policies to facilitate achieving those goals, and identifies priority investments that are eligible for federal and some state funding. The MTIP then serves as a key tool for implementing the RTP by providing a snapshot of where federal transportation funds are anticipated to be spent over the first four federal fiscal years of the RTP.



**Figure 1. Agency partners that comprise the four-year MTIP**

Per federal requirements, planning and policy documents are "constrained to reasonably expected revenue." This means Metro, working with partner agencies, makes long-term (for the RTP) and short-term (for the MTIP) projections of transportation revenue secured and/or expected to the region from federal and state, regional, or local sources programmed to be spent on regionally significant projects. The projected revenues set the anticipated capacity of the region to make long and short-term transportation investments without over-expending available funds. These revenue projections are updated with each RTP and each MTIP cycle.

#### *What is included in the Metropolitan Transportation Improvement Program?*

The MTIP is comprised of several components, but can be categorized into the following major elements:

1. A list of projects within the federally-recognized metropolitan planning area (MPA) for the upcoming four fiscal years and numerous project details.
2. Descriptions of funding allocation processes, system-level performance of the package of projects included in the MTIP, demonstration of federal regulatory compliance including financial constraint, and RTP implementation.

3. A description of protocols, administrative procedures, and other related expectations for managing the MTIP once effective.

The following bulleted list describes in more detail the typical content and components of the MTIP.<sup>1</sup> Additionally, Figure 1 illustrates the entities responsible for identifying projects and programs which go into the project list and the components which go into the MTIP.

#### Project List

- A project list with the year-by-year anticipated expenditure schedule, phasing, and funding amounts

#### Discussion Sections

- Discussion by each partner agency on the policy direction and process used to identify and prioritize projects for entry in the MTIP.
- A programmatic discussion of how the MTIP complies with applicable federal regulations.
- A discussion of fiscal constraint and fund monitoring to ensure funds are not overspent.
- A discussion of the performance of the four-year investment program relative to federal and regional performance goals, objectives, and targets.
- A discussion on the public involvement process used to develop the MTIP. (Public involvement is also discussed as part of the sections by individual partner agencies on the policy direction and process for identifying and prioritizing investments.)

#### Administration and Monitoring

- A section discussing the policies, protocols, and expectations in the administration of the MTIP, including change management procedures (e.g. administrative modifications and amendments).

#### *How does the MTIP get used?*

The primary functions of the MTIP, once adopted and approved, are implementation, monitoring, and federal compliance. As a monitoring tool, the project list component of the MTIP can be considered the “living” portion of the document whereas the discussion sections (e.g. individual funding allocation processes, federal compliance, and system performance and the administrative protocols) and the administrative protocols remain static. The “living” component assists in tracking spending and delivery of transportation projects and ensure continued compliance with federal regulations, such as fiscal constraint. Since transportation projects can run into numerous unexpected hurdles, project leads regularly submit amendments are regular to reflect changes to their projects. This ultimately creates the need for having a living portion of the document to

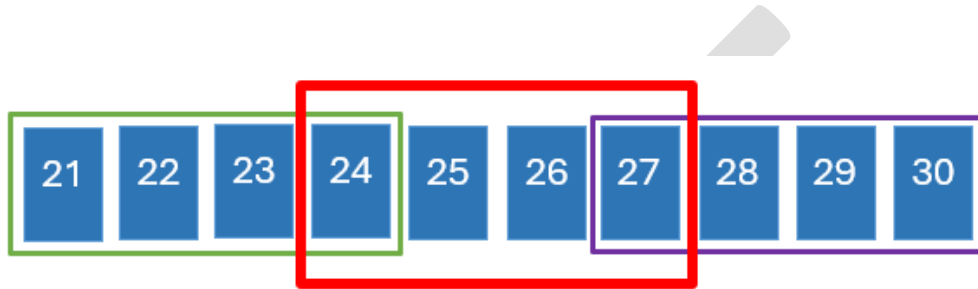
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<sup>1</sup> Bulleted list represents standard content, but additional components may be part of the MTIP in response to federal requirements or guidance.



monitor implementation, adjust as necessary, and continue to ensure continued compliance with federal regulations.

Metro continues to use the approved MIP for the current program cycle to monitor the status of the included projects while also developing the MTIP for the upcoming program cycle. Information from the approved MTIP usually feeds into the development of the MTIP for the next program cycle. Figure 2 illustrates how the approved MTIP for the current cycle is related with the MTIPs for the previous and upcoming cycles.

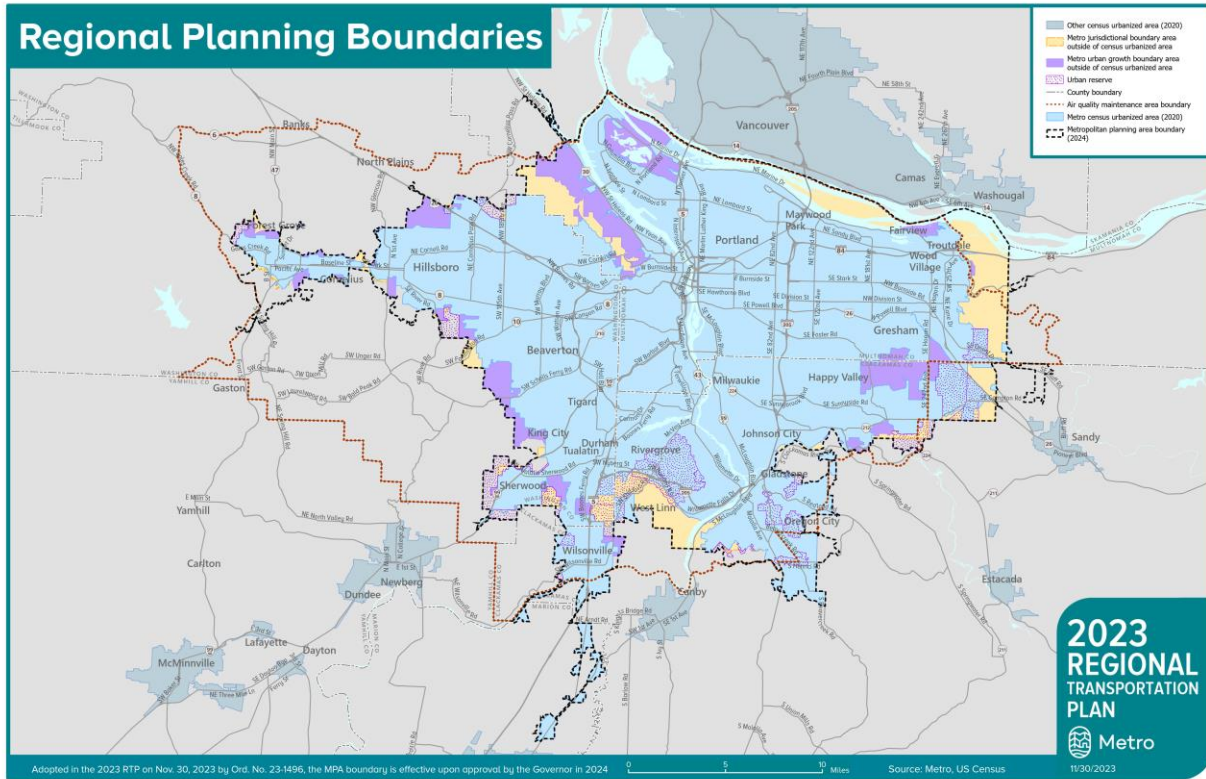


**Figure 2. The overlap of fiscal years between an approved MTIP and a MTIP under development. The red box represents the fiscal years encompassing the approved MTIP and the purple box represents the fiscal years for the MTIP in development. The green box represents the previously approved MTIP.**

*What is the relationship between the MTIP and the State Transportation Improvement Program (STIP)?*

The MTIP comprises the regionally significant, federally funded transportation projects and programs located within the metropolitan planning area (MPA). For the Portland metropolitan region, the MPA encompasses the urbanized areas of Multnomah, Washington, and Clackamas counties as defined by the US Census Bureau, and additional areas expected to urbanize within the next twenty years. Figure 3 shows the MPA boundary defined (Bold, dotted line) for the Portland metropolitan region. The MPA boundary shown in Figure 3 reflects the urban area as defined by the 2020 Census and represents the Metro region recommendation submitted to the Oregon Department of Transportation. The updated MPA will be effective upon approval of the new boundary by the Governor in 2024. Metro, as the MPO for the region is responsible for development, implementation, and stewardship of the MTIP.

Figure 3. Federal metropolitan planning area for the Portland (OR) metropolitan region



The state department of transportation is responsible for the development, implementation, and stewardship of the STIP. Each MPO is responsible for developing and adopting a MTIP for each respective metropolitan planning area. The STIP includes all MTIPs from across the state as well as projects approved by the state department of transportation outside of the MPO planning areas. The state department of transportation coordinates with each MPO during their funding allocation processes and when allocating funds to projects within an MPO, requests the MPO include those project funding awards in the MTIP.

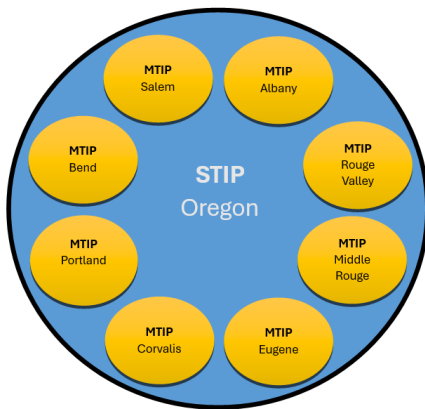


Figure 4. MTIP and STIP relationship – MTIPs are not to scale.

By federal law, the MTIP is required to be included as part of the STIP without change once approved by the MPO governing board and the Governor. The STIP is then approved by the Governor and submitted to U.S. Department of Transportation for approval. Figure 4 shows the MTIP and STIP relationship.

*Who are the partners and who makes the decisions around the MTIP?*

Development of the MTIP is a cooperative effort between regional and state partner agencies. Metro acts as the main coordinator, author, and administrator of the MTIP, but works closely with ODOT, TriMet, and SMART to report the allocation of all federal as well as regionally significant state and local transportation dollars within the MPA. Each of these agencies plays a different role in advancing the region's transportation system based on enabling legislation and has authority over different state and federal transportation funds. For example, TriMet and SMART's roles in the regional transportation system is to provide public transit service and utilize funding from the Federal Transit Administration (FTA) to support capital programs to operate services. Since Metro, ODOT, TriMet, and SMART each have a role in administering FTA funds, each agency is responsible for providing details of expenditures from year to year as well as demonstrating how the transportation expenditures help advance federal, state, and regional priorities. A brief synopsis of each agency's role is provided below.



**Metro** is a directly elected regional government, serving more than 1.7 million people in Clackamas, Multnomah, and Washington counties. The agency's boundary encompasses 24 cities. Metro's main function is to provide regionwide planning, coordination, and services to manage the urban growth boundary and address transportation, solid waste, and land development issues that cross jurisdictional boundaries.

For federal purposes, Metro is the Metropolitan Planning Organization (MPO), as defined by federal law and designated by the State of Oregon, for the Oregon side of the Portland-Vancouver urbanized area. As the MPO, Metro is the lead agency responsible for developing the regional transportation plan every five years and the MTIP – the schedule of federal transportation spending in the Portland region. Metro conducts these activities in cooperation and coordination with the region's cities, counties, the Port of Portland, the Oregon Department of Transportation, transit providers and other partners, and provides meaningful opportunities for public input. Metro also coordinates and develops the region's transportation goals and policies and identifies the range of road, public transit and bike/pedestrian transportation projects and transportation management programs that are needed to implement them.

Metro is the nation's first directly elected regional government, led by the Metro Council, which consists of a president, elected regionwide, and six councilors who are elected by district every four years in nonpartisan races. The Metro Council works with community leaders and constituents across city and county boundaries to shape the future of the greater Portland region. For purposes of meeting federal regulations pertaining to Metro's MPO designation, the Metro Council is advised

by the Joint Policy Advisory Committee on Transportation (JPACT) specifically related to MPO activities.


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 strives for a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including updating the RTP and MTIP. All transportation-related actions (including federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both bodies.

The **Transportation Policy Alternatives Committee (TPAC)** provides technical input, helps develop policy options and makes recommendations for consideration by JPACT. TPAC's membership consists of 21 technical staff from the same governments and agencies as JPACT, plus a representative from the Southwest Washington Regional Transportation Council, and six community members appointed by the Metro Council. In addition, the Federal Highway Administration and C-TRAN have each appointed an associate non-voting member to the committee.

TPAC reviews regional plans, federally funded transportation projects, monitors the development of the MTIP, and advises and makes recommendations to JPACT on transportation investment priorities and policies related to transportation. Such efforts include reducing greenhouse gas emissions and creating communities with easy access to mobility options. The committee also helps identify needs and opportunities for involving the public in transportation matters.



The **Oregon Department of Transportation** is a statewide transportation agency. ODOT is responsible for the state-owned transportation facilities across Oregon. This includes state highways and the interstate freeway system. ODOT also administers state generated public transit funding and provides support to transit agencies serving areas outside of large metropolitan areas to comply with federal regulations as well as supporting intra-city rail and bus services. The ODOT Region 1 office oversees the state facilities for the Portland metropolitan area. Responsible for administering federal transportation funds, ODOT is a key partner in providing important transportation investment information for the development of the MTIP.

**TRI MET**  **Tri-County Metropolitan Transportation District (TriMet)** is the largest public transportation service provider within the Portland metropolitan region. The agency provides both local and regional public transportation services from neighborhood bus routes to multi-county light rail service. As an

entity responsible for administering federal transportation funds, TriMet is a key partner in providing important transit investment information for the development of the MTIP.



The **South Metro Area Regional Transit (SMART)** is a public transportation service provider for the City of Wilsonville. SMART provides local public transportation services and some regional transit services. As an entity responsible for administering federal transportation funds, SMART is a key partner in providing important transit investment information for the development of the MTIP.

### 2027-2030 MTIP Program Direction

The 2027-2030 MTIP has four objectives that will guide development and implementation of the 2027-2030 MTIP. The four 2027-30 MTIP objectives are:

1. **Advance 2023 Regional Transportation Plan implementation** – Advance implementation of the 2023 RTP and demonstrate progress toward the plan’s vision and goals in addressing the region’s transportation needs.
2. **Apply the strategic funding approach** – Follow the direction laid out in the Strategic Funding Approach, which prioritizes certain funding sources for certain types of projects.
3. **Foster regional funding coordination** – Develop the MTIP and conduct funding allocation processes in a coordinated and transparent manner, collaborating across agencies to identify opportunities to leverage other funds.
4. **Ensure federal compliance** – Follow federal regulations<sup>2</sup> and address relevant federal certification corrective actions and recommendations related to development and administration of the MTIP, performance-based planning and programming, consultation, and public involvement for the MTIP.

The MTIP objectives are largely a continuation of MTIP program direction adopted as part of previous cycles. Small refinements and updates have been made to the program direction to reflect changes in federal laws, funding programs, as well as the goals adopted in the 2023 RTP.

Furthermore, the region has coordinated on nominating funding priorities for competitive national discretionary grants. Referencing this in the 2027-2030 MTIP program direction is an effort to formalize this regional practice.

In developing the 2027-2030 MTIP, partners acknowledge these objectives and agree to work in a cooperative fashion as described in “Three C’s: continuous, cooperative, and comprehensive” of federal regulation pertaining to metropolitan planning. The cooperative “Three C’s” process is to achieve the objectives outlined and align investments accordingly.

To provide further clarity, a description of each objective guiding the 2027-2030 MTIP is provided.

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<sup>2</sup> Code of Federal Regulations (CFR) 23 CFR 450.300 – 450.340 outline these requirements.

## Objective 1 – Advance 2023 RTP Implementation

Metro is responsible for demonstrating the programmatic four-year investment package in the MTIP advances implementation of the RTP. The RTP is the blueprint for transportation in the greater Portland region and a key tool for implementing the region's [2040 Growth Concept](#) and [Climate Smart Strategy](#). The plan guides investments for all forms of travel – driving, transit, biking, and walking – and the movement of goods and services throughout greater Portland. It identifies urgent and long-term transportation needs and priority investments to meet those needs.

Adopted by JPACT and the Metro Council in November 2023, the 2023 RTP provides the policy foundation for investments in the 2027-2030 MTIP, defining a vision, goals, objectives, and policies for all investments made on the regional transportation system.

**Figure 5. 2023 RTP vision and goal areas for the regional transportation system**



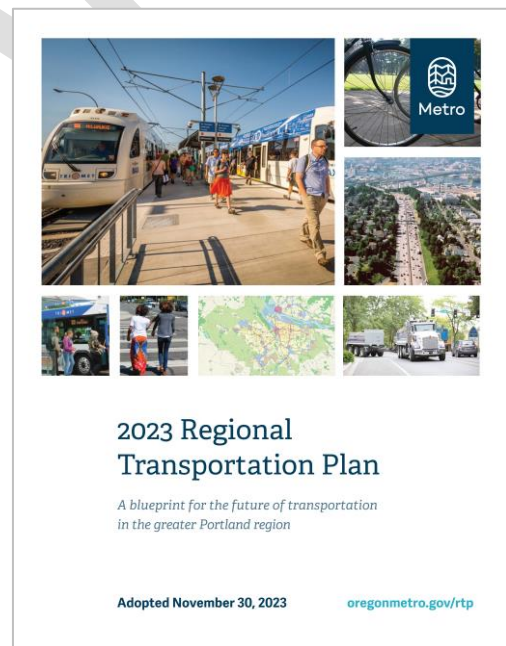
*Source: 2023 Regional Transportation Plan (Chapter 2)*

Shown in Figure 5, the goal areas in Chapter 2 of the 2023 RTP are:

- **Mobility options** – People and businesses can reach the jobs, goods, services, and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming.
- **Safe system** – Traffic deaths and serious crashes are eliminated, and all people are safe and secure when traveling in the region.
- **Equitable transportation** – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes are eliminated. The disproportionate barriers that people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.
- **Thriving economy** – Centers, ports, industrial areas, employment areas and other regional destinations are accessible through a variety of multimodal connections that help people, communities and businesses thrive and prosper.
- **Climate action and resilience** – People, communities and ecosystems are protected, healthier and more resilient. Carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling. People travel shorter distances to get where they need to go.

Investments proposed for the 2027-2030 MTIP are expected to make progress toward achieving the vision and goals of the RTP and be drawn from the 2023 RTP financially constrained project list (2023 RTP Appendix A)—only projects that are included in the RTP financially constrained project list are eligible for inclusion in the MTIP. The 2023 RTP financially constrained project list includes more than \$69 billion in priority investments with nearly \$28 billion invested in capital projects and related programs and more than \$41 billion invested in operations and maintenance of the system. Projects and programs in the RTP come from adopted local, regional, or state planning efforts that provided opportunities for public input.

As the 2027-2030 MTIP investments get compiled into a four-year investment program, an evaluation of the package of investments assesses how well the investments make progress towards the 2023 RTP goals. Recognizing the role and function of 2027-2030 MTIP, the program direction places greater emphasis on demonstrating that individual funding allocations administered by Metro, ODOT, TriMet and SMART considered and utilized the 2023 RTP goals in deliberations for their respective prioritization and selection of projects and programs to award funds.



## **Objective 2 – Apply the Strategic Regional Funding Approach**

In May 2009, JPACT and the Metro Council developed a strategic regional funding approach to direct how the transportation needs of the region are to be addressed by existing or potential transportation funding sources. Since 2009, the strategic regional funding approach provides a starting point for the various funding programs or sources that are addressed in the MTIP and State Transportation Improvement Program (STIP).

The approach identifies funding mechanisms agencies use and a regional strategy for sources to be pursued to address unmet needs of the different elements of transportation system in the region. The approach has been utilized in the development of Regional Flexible Funds Allocation (RFFA) processes since the 2010-2013 and 2012-2015 MTIP cycles, with the most recent strategic regional funding approach adopted as part of 2025-2027 Regional Flexible Fund Allocation program direction.

Since the adoption of the 2019-2021 and 2022-2024 RFFA program direction (formerly policy statement), new revenue sources as well as administrative and process changes to certain sources of funds (e.g. restructuring of ODOT allocation programs) necessitates administrative updates to the adopted strategic regional funding approach.

Attachment 1 provides the updated version of the strategic regional funding approach reflecting these administrative changes. Additionally, knowing funding and revenue raising conversations are set to take place throughout 2024 and 2025, these conversations may reshape the region's funding approach and strategy. Therefore, the strategic regional funding approach will remain an interim approach for the purposes of guiding the MTIP development process to be undertaken in the same period. As further discussion takes place regarding any of the source funds identified, periodic updates will be made. However, Attachment 1 represents the previously agreed upon regional transportation funding approach, as updated to reflect new funding actions and administrative updates.

## **Objective 3 – Foster Regional Funding Coordination**

### **Regional Coordination on Federal Discretionary Funding Opportunities**

As part of the implementation of the strategic regional funding approach, the region's partners agree to regional coordination and information sharing when competing on the national stage for federal competitive discretionary funding programs. Examples of these programs include, but not limited to: Federal Transit Administration's Capital Investment Grants – New Starts and Small Starts, and Federal Highway Administration's Infrastructure for Rebuilding America (INFRA). Regional coordination is in effort to make regional partners aware of what competitive applications are being put forward and ensure any necessary MPO programming or planning requirements have been met to allow access to funds if awarded. Information of these coordinated efforts may also be shared with the region's congressional delegation to inform them of regional funding priorities.

### **Coordination and Leveraging of Federal Funds Across Funding Allocation Programs**



Recognizing the scarcity of funding resources for the transportation system, JPACT and the Metro Council supports leveraging funding opportunities being administered by different agencies within the region. However, JPACT and Metro Council desire to see leverage opportunities be discussed in a transparent and open manner that allows for partners to provide feedback and bring awareness to potential funding leveraging opportunities. To facilitate leveraging opportunities, regional agency are encouraged to:

- identify opportunities to leverage funding early, particularly in the program design phase (e.g. program direction update for the 2028-2030 Regional Flexible Fund, Carbon Reduction Program Funding or the 2027-2030 STIP allocation of revenues to ODOT programs) and prior to the solicitation of projects for individual funding programs.
- identify whether federal funds or a regionally significant project would be involved in leveraging other funding (whether federal or local) to ensure eligibility requirements and other factors are appropriately met; and
- begin coordination early between potential administering agencies and determine a pathway for proposals or approvals by appropriate entities, as necessary.

Regional partners that may have intentions of pursuing additional sources of funding should share the agency's intentions early in the process with the MPO. Working closely and early in the process with the MPO during the application process allows for improved regional coordination, affirms project eligibility, and assures funding is secured in an expedited fashion. Funding proposals can be shared with MPO staff for review. The funding proposal review process allows for MPO staff to prepare for administration and coordination of funds.

Administrative funding proposals (e.g. funding swaps, changing the federal fund type) are exempt from this process, but must undergo the procedural MTIP change management process (administrative modification or amendment) depending on the significance of the changes requested.

#### **Objective 4 – Ensure Federal Compliance**

As a federal requirement to remain eligible to expend federal transportation funding, the 2027-2030 MTIP and the process by which it is developed is expected to comply with all applicable federal regulations. Applicable regulations include, but are not limited to:

- 23 CFR 450.300 – 23 CFR 450.340– Metropolitan Planning
  - with particular emphasis on section 23 CFR 450.326 - Development and content of the transportation improvement program (TIP).
- Civil rights legislation (e.g. Title VI, Americans with Disabilities Act) and public involvement.
- Performance-based planning and programming.
- Congestion management process.
- Financial constraint (23 CFR 450.326(j))

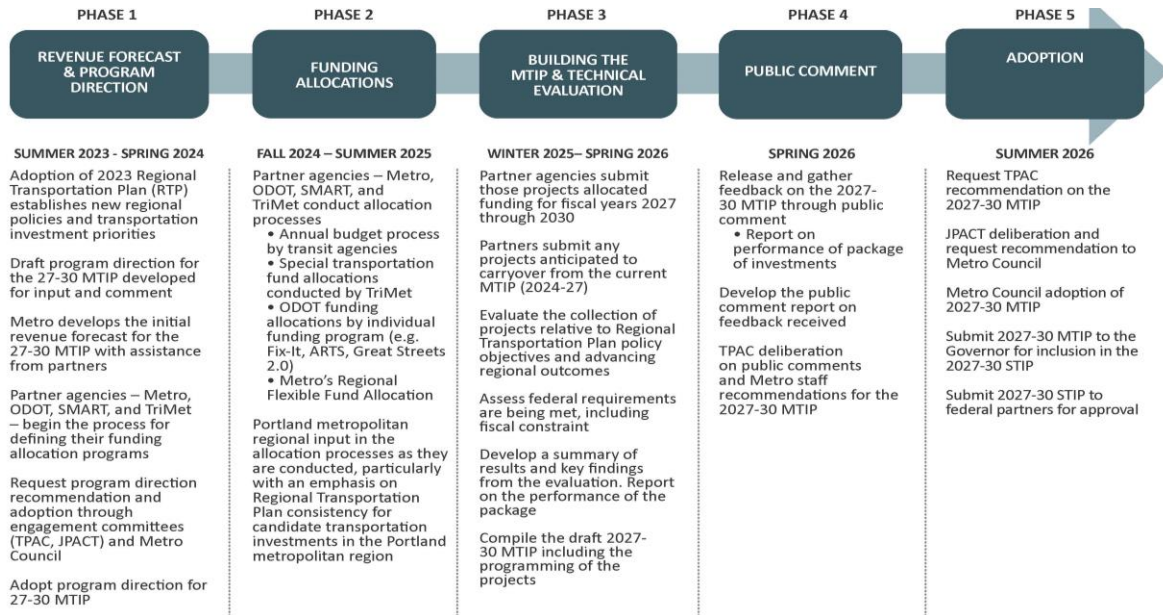
Additionally, the findings from the 2021 Transportation Management Area (TMA) Certification, findings that will emerge from the 2024 TMA Certification, the 2024-2027 STIP Approval, and Statewide Planning Findings are expected to be addressed and guide the development and implementation of the 2027-2030 MTIP.

As part of Metro's responsibilities, the agency's evaluation of the programmatic four-year investment package will assess the region's implementation progress towards federal, state, and regional performance targets and if necessary, identify areas for course correction for future MTIPs.

The 2027-2030 MTIP program direction is intended to provide clarity to regional partners on the federal requirements with which the 2027-2030 MTIP is obligated to comply. The information from the 2027-2030 MTIP program direction is expected to be communicated to regional partners conducting funding allocations as a means of informing those processes and ensure submitted projects comply with federal mandates. This is to ensure the region does not jeopardize its eligibility to expend federal funding and demonstrate to federal partners' stewardship in the planning, programming, and expenditure of federal transportation funds.

### **2027-2030 MTIP Program Development and Implementation Process**

As part of the process for implementing the 2027-2030 MTIP program, Metro, as the MPO, will serve in the lead role for coordinating information sharing and other MTIP-related development activities. The Transportation Policy Alternatives Committee (TPAC) will serve as the main venue for coordination pertaining to the development and implementation of the 2027-2030 MTIP program. The TPAC work program will be updated to include discussion items pertaining to the development of the 2027-2030 MTIP, including the individual funding allocation processes undertaken by the entities which administer federal transportation funds. TPAC will also be requested to recommend approval of the adoption draft of the 2027-2030 MTIP to JPACT in summer 2026. Figure 6 illustrates the 2027-2030 MTIP timeline.



**Figure 6. 2027-2030 Metropolitan Transportation Improvement Program Process and Adoption Timeline.**

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### Attachment 1: Updated Strategic Regional Funding Approach

The following table is an updated version of the 2018 adopted regional funding approach. The updates, although not exhaustive, reflect new revenue sources and administrative changes to funding sources and the eligible activities. As policy direction for funds may change, federal transportation reauthorization may change eligibility requirements of existing funds, or through JPACT and the Metro Council direction, the regional funding approach may be updated to reflect the administrative or policy direction changes. The 2027-2030 MTIP program direction includes the current regional funding approach as follows.

**Table A.1: Updated Regional Transportation Funding Approach – (Interim May 2024)**

Transportation Project/ Activity Type	Existing Funding Sources	Strategy for Sources of Additional Funding
Local/Neighborhood Street Reconstruction and Maintenance	<ul style="list-style-type: none"> <li>• State pass through funds</li> <li>• Street utility fees</li> <li>• Local gas tax</li> <li>• System development charges</li> </ul>	<ul style="list-style-type: none"> <li>• Increases in state gas tax (e.g. House Bill 2017)</li> <li>• Increases in vehicle registration fees</li> <li>• New street utility fees or equivalent</li> <li>• Additional or new local gas tax</li> </ul>
Active Transportation (includes bicycle, pedestrian, and small on-street transit capital improvements like bus shelters)	<ul style="list-style-type: none"> <li>• Regional Flexible Funds</li> <li>• STBG – Transportation Alternatives Set Aside</li> <li>• ODOT Community Paths</li> <li>• ODOT Great Streets 2.0</li> <li>• ODOT ADA curb ramp and push buttons program</li> <li>• ODOT Safe Routes to Schools Infrastructure</li> <li>• Statewide Transportation Improvement Fund (STIF)</li> <li>• ODOT 1% gas tax dedication</li> <li>• Privilege tax on bicycle sales</li> <li>• Local gas or property tax, vehicle registration, system development charges, or street utility</li> <li>• Carbon Reduction Program – Regional</li> <li>• Carbon Reduction Program - State</li> </ul>	<ul style="list-style-type: none"> <li>• Pursue new federal program</li> <li>• State Urban Trail fund</li> <li>• Increases in state gas tax (e.g. House Bill 2017)</li> <li>• New local or regional funds</li> </ul>

Transportation Project/ Activity Type	Existing Funding Sources	Strategy for Sources of Additional Funding
Highway & Bridges Preservation	<ul style="list-style-type: none"> <li>• Federal Highway Formula Programs (NHPP, STBG, Bridge)</li> <li>State gas tax &amp; weight/mile fees dedicated to ODOT Fix-It program.</li> <li>• Other state (e.g. House Bill 2017) directed funding</li> </ul>	<ul style="list-style-type: none"> <li>• Increases in state gas tax</li> <li>• Increases in vehicle registration fees</li> <li>• New street utility fees or equivalent</li> <li>• Congestion Pricing/Tolling</li> </ul>
Transit Operations	<ul style="list-style-type: none"> <li>• Employer tax</li> <li>• Employee tax</li> <li>• Passenger fares</li> <li>• Section 5307 urbanized area formula</li> <li>• Section 5310 special transportation</li> <li>• Advertising revenue</li> <li>• Statewide Transportation Improvement Fund (STIF)</li> </ul>	<ul style="list-style-type: none"> <li>• Increases in employee and employer tax rate</li> <li>• New funding mechanism</li> <li>• Passenger fare increases</li> </ul>
Minor & Major Arterial Expansion, Improvements, and Reconstruction	<ul style="list-style-type: none"> <li>• Development Fees (e.g. Frontage, Impact Fees, System Development Charges)</li> <li>• Urban Renewal</li> <li>• ODOT Region 1 operations allocation program (Fix-it)</li> <li>• Other federal or state (e.g. House Bill 2017) directed spending</li> <li>• Regional Flexible Funds<sup>3</sup></li> <li>• Federal Discretionary Grants</li> <li>• National Freight Program</li> </ul>	<ul style="list-style-type: none"> <li>• Development fees rate increases</li> <li>• New local or regional funds</li> <li>• Increase in state gas tax</li> <li>• Increase in vehicle registration fee</li> <li>• Congestion Pricing/Tolling mitigation funds</li> </ul>
Throughway Expansion	<ul style="list-style-type: none"> <li>• ODOT 2027-2030 STIP Strategic Investment Fund</li> <li>• Regional Flexible Funds<sup>4</sup></li> <li>• National Highway Preservation Program</li> <li>• National Freight Program</li> <li>• Other federal or state (e.g. House Bill 2017) project directed funding</li> </ul>	<ul style="list-style-type: none"> <li>• More from existing sources</li> <li>• Congestion Pricing/Tolling</li> <li>• Increase in state gas tax or equivalent (e.g. HB 2017)</li> <li>• New local or regional funds</li> <li>• New Federal Discretionary funds (EG INFRA, MEGA)</li> </ul>

<sup>3</sup> Limited to project development, ITS on arterial freight facilities, and small capital projects.

<sup>4</sup> Limited to project development with large discretionary funding leverage opportunities.

Transportation Project/ Activity Type	Existing Funding Sources	Strategy for Sources of Additional Funding
	<ul style="list-style-type: none"> <li>• Federal Discretionary grants</li> <li>• Privilege tax on vehicles</li> </ul>	
High-Capacity Transit Expansion	<ul style="list-style-type: none"> <li>• Federal Capital Investment Grants (e.g. New Starts/Small Starts)</li> <li>• State lottery, right-of-way donation or legislative allocation</li> <li>• Regional Flexible Funds</li> <li>• TriMet General Fund</li> <li>• Local contributions</li> </ul>	<ul style="list-style-type: none"> <li>• More from existing sources</li> <li>• New local or regional funds</li> </ul>
TSMO/Travel Options	<ul style="list-style-type: none"> <li>• ODOT transportation demand management program allocation to regions</li> <li>• Regional Flexible Funds</li> <li>• Carbon Reduction Program – Regional</li> <li>• Carbon Reduction Program – State</li> <li>• Regional Safe Routes to School</li> </ul>	<ul style="list-style-type: none"> <li>• New local or regional funds</li> <li>• More from existing sources</li> </ul>
Land Use – TOD	<ul style="list-style-type: none"> <li>• Regional Flexible Funds</li> </ul>	<ul style="list-style-type: none"> <li>• New local or regional funds</li> <li>• More from existing sources</li> </ul>

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.

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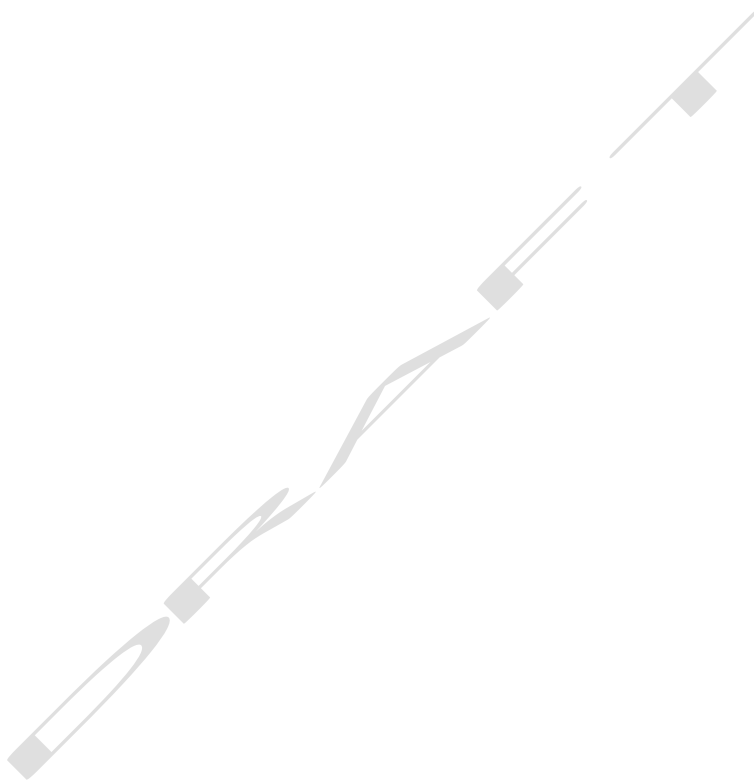
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## STAFF REPORT

### IN CONSIDERATION OF RESOLUTION NO. 24-5418, FOR THE PURPOSE OF ADOPTING THE 2027-30 METRO TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) PROGRAM DIRECTION

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Date: 05/08/2024  
Department: Planning  
Meeting Date: June 13<sup>th</sup>, 2024

Presenter(s), (if applicable): Blake Perez,  
he/him, Associate Transportation  
Planner; Ted Leybold, he/him, Resource  
Development Manager  
Length: 30 minutes

Prepared by: Blake Perez,  
blake.perez@oregonmetro.gov

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## ISSUE STATEMENT

The purpose of the 2027-2030 MTIP program direction is to provide clarity on the guiding direction for the investments to request inclusion as part of the 2027-2030 MTIP. The 2027-2030 MTIP program direction establishes the expectations among regional partners and guides federal and relevant state and local transportation investments proposed for fiscal years 2027 through 2030 in the metropolitan planning area. It does this by describing the policy priorities and outcomes transportation investments are expected to advance in support of the RTP. For those partners with responsibilities to administer federal transportation funds, the 2027-2030 MTIP program direction is a reaffirmation of the common goals and objectives the planned investments are expected to make progress towards while in their stewardship.

## ACTION REQUESTED

- Staff will be seeking approval of recommendation of the 2027-30 MTIP program direction at the May 23<sup>rd</sup> JPACT meeting.
- Adoption of 27-30 MTIP program direction by Metro Council on June 13th.

## IDENTIFIED POLICY OUTCOMES

The desired objectives for the 2027-2030 MTIP program direction is for all regional partners to come to a shared understanding of the policy direction guiding the development and implementation of the 2027-2030 MTIP. The four 2027-30 MTIP objectives are:

1. **Advance 2023 Regional Transportation Plan implementation** – Advance implementation of the 2023 RTP and demonstrate progress toward the plan’s vision and goals in addressing the region’s transportation needs.

2. **Apply the strategic funding approach** – Follow the direction laid out in the Strategic Funding Approach, which prioritizes certain funding sources for certain types of projects.
3. **Foster regional funding coordination** – Develop the MTIP and conduct funding allocation processes in a coordinated and transparent manner, collaborating across agencies to identify opportunities to leverage other funds.
4. **Ensure federal compliance** – Follow federal regulations<sup>1</sup> and address relevant federal certification corrective actions and recommendations related to development and administration of the MTIP, performance-based planning and programming, consultation, and public involvement for the MTIP.

In developing the 2027-2030 MTIP, partners acknowledge these policies and agree to work in a cooperative fashion as described in “Three C’s: continuous, cooperative, and comprehensive” of federal regulation pertaining to metropolitan planning. The cooperative “Three C’s” process is to achieve the directives outlined and align investments accordingly.

## **POLICY QUESTION(S)**

The 2023 RTP provides the policy foundation for investments in the 2027-2030 MTIP, defining a vision, goals, objectives, and policies for all investments made on the regional transportation system.

## **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

None at this time.

## **STAFF RECOMMENDATIONS**

Approve Resolution 24-5418 adopting the 2027-30 Metro Transportation Improvement Program (MTIP) program direction.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

The MTIP objectives are largely a continuation of MTIP program direction adopted as part of previous cycles. Small refinements and updates have been made to the program direction to reflect changes in federal laws, funding programs, as well as the goals adopted in the 2023 RTP. Furthermore, the region has coordinated on nominating funding priorities for competitive national discretionary grants. Referencing this in the 2027-2030 MTIP program direction is an effort to formalize this regional practice.

Staff presented the draft 27-30 MTIP program direction to TPAC on Friday, May 3<sup>rd</sup>. Several topics were discussed, which include:

- Clarification on highway and arterial roadway funding strategy.
- Defining electric infrastructure in the regional funding strategy.

- Utilizing the interim regional funding strategy as a starting point for future legislative priorities.

After discussion, TPAC voted unanimously to recommend 27-30 MTIP program direction to JPACT.

## **ATTACHMENTS**

- Worksheet
- Resolution
- 27-30 MTIP program direction
- Staff report

[For work session:]

- Is legislation required for Council action? **X Yes**  No
- If yes, is draft legislation attached? **X Yes**  No
- What other materials are you presenting today? Slides to be provided