



600 NE Grand Ave.
Portland, OR 97232-2736

Council meeting agenda

Thursday, August 1, 2024

10:30 AM

Metro Regional Center, Council Chamber,
<https://zoom.us/j/615079992> Webinar ID:
615 079 992 or 888-475-4499 (toll free)
[https://www.youtube.com/watch?
v=TCpXQ5EskgE&list=PLb2faWWqJxGAOgO
HIX1Wdw4NNSBfpYH-&index=1](https://www.youtube.com/watch?v=TCpXQ5EskgE&list=PLb2faWWqJxGAOgOHIX1Wdw4NNSBfpYH-&index=1)

This meeting will be held electronically and in person at the Metro Regional Center Council Chamber.

You can join the meeting on your computer or other device by using this link:

<https://zoom.us/j/615079992> Webinar ID: 615 079 992 or 888-475-4499 (toll free)

1. **Call to Order and Roll Call**
2. **Public Communication**

Public comment may be submitted in writing. It will also be heard in person and by electronic communication (video conference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00 p.m. the day before the meeting will be provided to the council prior to the meeting. Testimony on non-agenda items will be taken at the beginning of the meeting. Testimony on agenda items generally will take place during that item, after staff presents, but also may be taken at the beginning of the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to legislativecoordinator@oregonmetro.gov. Those wishing to testify in person should fill out a blue card found in the back of the Council Chamber.

Those requesting to comment virtually during the meeting can do so by joining the meeting using this link: <https://zoom.us/j/615079992> (Webinar ID: 615079992) or 888-475-4499 (toll free) and using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3. **Consent Agenda**

- 3.1 Resolution No. 24-5426 For the Purpose of Adding, Canceling, or Amending a Total of Seven Projects to Meet Federal Transportation Project Delivery Requirements [RES 24-5426](#)

Attachments: [Resolution 24-5426](#)
[Exhibit A](#)
[Staff Report](#)
[Attachment 1](#)

4. Resolutions

- 4.1 Resolution No. 24-5424 For the Purpose of Adding Two New Projects and Canceling One Existing Project from the 2024-27 MTIP, and Amending the Previously Obligated Rose Quarter Improvement Project, to Meet Federal Transportation Project Delivery Requirements [RES 24-5424](#)

Presenter(s): Ted Leybold, Transportation Planning and Policy Director, Metro
Megan Channell, ODOT Rose Quarter Project Director, ODOT

Attachments: [Resolution No. 24-5424](#)
[Exhibit A](#)
[Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)

4.1.1 Public Comment Opportunity for Resolution No. 24-5424

5. Other Business

- 5.1 Update on Employee Engagement at Metro [24-6109](#)

Presenter(s): Kayla Martin (she/her), Project Manager, Metro
Holly Calhoun (she/her), DCOO, Metro

Attachments: [Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)

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Ogeysiiska takooris la'aanta ee Metro

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

إشعار بعدم التمييز من Metro

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**Resolution No. 24-5426 For the Purpose of Adding,
Canceling, or Amending a Total of Seven Projects to Meet
Federal Transportation Project Delivery Requirements**
Consent

Metro Council Meeting
Thursday, August 1st, 2024

BEFORE THE METRO COUNCIL

**FOR THE PURPOSE ADDING, CANCELING,
OR AMENDING A TOTAL OF SEVEN
PROJECTS TO MEET FEDERAL
TRANSPORTATION PROJECT DELIVERY
REQUIREMENTS**) RESOLUTION NO. 24-5426
)
) Introduced by: Chief Operating
) Officer Marissa Madrigal in
) 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. 23-5335 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 (USDOT) 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 Oregon Department of Transportation's (ODOT) statewide funding shortfall has triggered a required State Transportation Improvement Program rebalancing action to determine which ODOT funded projects can be delayed, slipped to later years, determined to be a delivery priority, or can be canceled from the STIP; and

WHEREAS, the STIP rebalancing action impacts four of the seven projects resulting in required funding adjustments, fund swaps, phase delivery delays, or outright cancelation from the STIP; and

WHEREAS, Metro is receiving their regular three-year Transportation Options funding allocation from ODOT totaling \$1,462,875 in support of required Regional Travel Options program activities which Metro will lead and complete for ODOT; and

WHEREAS, the Oregon Parks and Recreation Department has awarded a \$33,660, Recreational Trails Program discretionary grant award to the Tualatin Riverkeepers that

will provide updated trail information and also impacts the Metro Pedestrian and Bicycle modeling networks which results in an MTIP programming action; and

WHEREAS, the latest cost estimate for ODOT's US26 Powell Blvd project that will provide multiple street, pedestrian, and bicyclist upgrades requires an additional \$39.8 million construction phase funding increase to enable the construction phase to be obligated and implemented; and

WHEREAS, on July 12, 2024, Metro's Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution and on July 18, 2024, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to amend or add the five projects as stated in more within Exhibit A to the 2024-27 Metropolitan Transportation Improvement Program to meet federal project delivery requirements.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Exhibit A
July #1 FFY 2024 Formal/Full MTIP Amendment Summary
Formal Amendment #: JL24-10-JUL1

The July #1 Federal Fiscal Year 2024 MTIP Formal Amendment represents the regular bundle of projects being amended or added to the 2024-27 MTIP to meet various federal delivery process approval requirements. The amendment bundle contains eight projects. Several of the required project changes continue the ODOT STIP rebalancing effort which is examining ways to save on project costs and diminish the impact of an existing funding shortfall. A summary of the ~~eight~~ **seven** projects includes the following:

1. Projects Being Canceled from the 2024-27 MTIP and STIP:

- **Key 23410 - I-84: NE Martin Luther King Jr Blvd - I-205 (ODOT)**: As part the STIP rebalancing actions to address an existing ODOT funding shortfall, Key 23419 is being canceled. The project current contains only the Preliminary Engineering phase programmed and is intended to design for pavement resurfacing to repair ruts and surface wear.

2. New Projects Being Added to the 2024-27 MTIP and STIP:

- **New Project Key 23676 - Metro Transportation Options FFY25 - FFY27 (Metro)**: Metro is receiving its regular three-year funding allocation from ODOT supporting the Regional Travel Options (RTO) program. The funding supplements the existing RTO program funding approved in the Metro Unified Planning Work Program (UPWP). The RTO program creates safe, vibrant and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use.
- **New Project Key 23671 - Portland Metro & Surrounding Areas Signing (ODOT)**: The formal amendment adds the new safety project to the MTIP which will provide various signing upgrades on Region 1 corridors for safety and maintenance improvements. Specific locations are to be determined.
- **New Project Key 23658 - Tualatin River Water Trail Access Enhancements (Tualatin Riverkeepers)**: The project was awarded Recreational Trail Program (RTP) funds from the Oregon Parks and Recreations Department and will provide various access improvements to the Tualatin Water Trail

3. Existing Projects Being Amended as Part of the July #1 Regular Formal Amendment Bundle:

- **Project Key 22613 - Portland Metro and Surrounding Areas Safety Reserve (ODOT):** Combining funds into Key 23671 as noted previously enabling Key 23671 to be added to the MTIP with full required funding.

- ~~**Project Key 21709 - OR120: Columbia Slough Bridge (ODOT):** The formal amendment updates the prior obligated Planning phase, decreases the PE phase, and primarily adds the required funding to the construction phase.~~

7/2/2024 Update: Per ODOT's request, Key 21709 has been removed from the amendment bundle. The construction phase will not be added to the project at this time. This decreases the July #1 202 MTIP Formal Amendment bundle from 8 to seven projects. The removal is considered part of the public notification process for the amendment.

- **Project Key 22431 - OR141/OR217 Curb Ramps (ODOT):** The MTIP formal amendment corrects a programming discrepancy between the MTIP and STIP (corrects and updates the per phase obligations) and adds funding to the construction phase to address a funding shortfall.
- **Project Key 21178 - US26 (Powell Blvd): SE 99th Ave - East City Limits (ODOT):** The formal amendment updates the funding levels in PE and ROW, plus adds new funds to support the construction phase.

The Exhibit A Tables that follow on the next pages contain the specific project changes for the fives in the July #2 Formal MTIP Amendment Bundle., See the Exhibit A/MTIP Worksheets for the detailed changes and consistency review areas. Additionally, the Portland Broadway Main Street and Supporting Connections project is being included for information and processing consistency purposes.

2024-2027 Metropolitan Transportation Improvement Program
Exhibit A to Resolution 24-5426

July #1 FFY 2024 (Regular) Formal Amendment Bundle Contents
Amendment Type: Formal/Full
Amendment #: JL24-10-JUL1
Total Number of Projects: 8 7

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Category: Existing Projects Being Canceled in the 2024-27 MTIP				
(#1) ODOT Key # 23410 MTIP ID 71200	ODOT	I-84: NE Martin Luther King Jr Blvd - I-205	Design for pavement resurfacing to repair ruts and surface wear.	<u>CANCEL PROJECT:</u> The MTIP formal amendment cancels the PE phase which effectively cancels the project from the MTIP and STIP. The cancellation results per the recent STIP rebalancing review as a cost savings action to address ODOT's funding shortfall

Category: Adding New Projects to the 2024-2027 MTIP				
(#2) ODOT Key # 23676 MTIP ID TBD <i>New Project</i>	Metro	Metro Transportation Options FFY25 - FFY27	Metro funding to promote and encourage the use of alternative transportation options during federal fiscal years 2025, 2026 and 2027.	<u>ADD NEW PROJECT:</u> The formal MTIP amendment adds the ODOT fund project grouping bucket (PGB) supporting Regional Travel Options (RTO) activities for Metro. The RTO program creates safe, vibrant and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#3) ODOT Key # 23671 MTIP ID TBD <i>New Project</i>	ODOT	Portland Metro & Surrounding Areas Signing	Complete various signing upgrades in Region 1 corridors for safety and maintenance improvements. Locations to be determined as needed based on investigations. This will allow for quicker response to safety concerns.	<u>ADD NEW PROJECT:</u> The formal MTIP amendment adds the new safety PGB providing safety signage upgrades by combining funds from Key 22613.
(#4) ODOT Key # 23658 MTIP ID TBD <i>New Project</i>	ODOT	Tualatin River Water Trail Access Enhancements	Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.	<u>ADD NEW PROJECT:</u> The formal MTIP amendment adds the new OPRD Tualatin Rive Trail RTP funded project to the MTIP. The project is located on the Metro Pedestrian and Bicycle networks resulting in its classification as a regionally significant project.
Category: Existing MTIP Projects Being Amended				
(#5) ODOT Key # 22613 MTIP ID 71337	ODOT	Portland Metro and Surrounding Areas Safety Reserve	Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.	<u>COMBINE FUNDS:</u> The formal MTIP amendment commits and transfers the available funding to ODOT new safety signage PGB in Key 23671 as noted above. As a result, Key 22613 is left "zero programmed".
(#6) ODOT Key # 21709 MTIP ID 71195	ODOT	OR120: Columbia Slough Bridge	Bridge replacement of the existing timber structure that is obsolete, costly to continuously repair, and can no longer support heavier loads.	<u>ADD PHASE:</u> The formal MTIP amendment updates the prior obligated Planning phase, decreases the PE phase, and primarily adds the required funding to the construction phase. The project is now fully programmed based on an estimated total project cost of \$59,676,998.

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#6) ODOT Key # 22431 MTIP ID 71247	ODOT	OR141/OR217 Curb Ramps	At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.	<u>COST INCREASE:</u> The MTIP formal amendment corrects a programming discrepancy between the MTIP and STIP (corrects and updates the per phase obligations) and adds funding to the construction phase to address a funding shortfall
(#7) ODOT Key # 21178 MTIP ID 71033	ODOT	US26 (Powell Blvd): SE 99th Ave - East City Limits	On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings.	<u>COST INCREASE:</u> The MTIP formal amendment updates the funding levels in PE and ROW, plus adds new funds to support the construction phase

Proposed Amendment Review and Approval Steps:

Date	Action
July #2 (JL24-11-JUL2) Rose Quarter Improvement Project Formal MTIP Amendment Required Approval Actions	
Tuesday, July 2, 2024	Post amendment & begin 30+ day notification/comment period.
Friday, July 12, 2024	July TPAC Meeting. Provide TPAC members will receive their official notification of the amendment bundle and be requested to provide an approval recommendation for the amendment resolution to JPACT.
Thursday, July 18, 2024	July JPACT meeting. JPACT will be requested to approve the amendment resolution and provide an approval recommendation to Metro Council
Friday, July 30, 2024	End the 30-day public comment period.
Thursday, August 1, 2024	Metro Council meeting. Request final Metro approval for the July #1 MTIP Formal Amendment bundle under amendment JL24-10-JUL1.
Wednesday, August 7, 2024	Submit final Metro approved July #1 amendment bundle to ODOT and FHWA to complete final approval steps.
Late August, 2024	Final approval from FHWA estimated should occur.



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

MTIP Formal Amendment
CANCEL PROJECT
 Cancel PE phase per STIP
 rebalancing review

Project #1 **CANCELED PROJECT**

Project Details Summary							
ODOT Key #	23410	RFFA ID:	N/A	RTP ID:	12094	RTP Approval Date:	11/30/2023
MTIP ID:	71200	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1287	

Summary of Amendment Changes Occurring:

The MTIP formal amendment cancels the PE phase which effectively cancels the project from the MTIP and STIP. The action results per the recent STIP rebalancing review to address ODOT's funding shortfall. The first action was to slip existing projects to future STIP years. Now, per the review, certain projects are now being canceled from the MTIP and STIP. The action also will be part of the annual STIP amendment that the Oregon Transportation Commission (OTC) will consider during their August 1, 2024 meeting.

Project Name:	I-84: NE Martin Luther King Jr Blvd - I-205						
Lead Agency:	ODOT	Applicant:	ODOT	Administrator:	ODOT		
Certified Agency Delivery:	N/A	Non-Certified Agency Delivery:	N/A	Delivery as Direct Recipient:	N/A		

Short Description:

Design for pavement resurfacing to repair ruts and surface wear.

MTIP Detailed Description (Internal Metro use only):

Design for a future pavement resurfacing project to repair ruts and surface wear.

STIP Description:

Design for pavement resurfacing to repair ruts and surface wear.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	Preservation or Maintenance	Maintenance and Preservation
ODOT Work Type:	PRESRV		

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									
NHPP	Y002	2025		\$ 1,725,436					\$ -
									\$ -
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	Match	2025		\$ 145,564					\$ -
									\$ -
State Totals:			\$ -	\$ 145,564	\$ -	\$ -	\$ -	\$ -	\$ -

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:			\$ -	\$ 1,871,000	\$ -	\$ -	\$ -	\$ -	\$ 1,871,000
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Estimated Project Cost									\$ -
Total Cost in Year of Expenditure:									\$ -

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed, but is being canceled.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ (1,871,000)	\$ -	\$ -	\$ -	\$ -	\$ (1,871,000)
Phase Change Percent:	0.0%	-100.0%	0.0%	0.0%	0.0%	0.0%	-100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	0.00%	N/A	N/A	N/A	N/A	N/A

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated							Aid ID
Federal Funds Obligated:							
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
					Estimated Project Completion Date:		N/A
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? PE was funded with federal National Highway Performance Program funds
2. Does the amendment include changes or updates to the project funding? All existing funding is being removed from the project.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via STIP Impacts Worksheet.
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? Yes, OTC approval will be required as part of the ODOT
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment?

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	I-84	0.40	7.12	6.72
Cross Streets	Route or Arterial		Cross Street		Cross Street
	I-84		I-5 interchange		I-205 Interchange

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification						
1st Year Programmed	2025	Years Active	0	Project Status	1	Pre-first phase obligation activities (IGA development, project scoping, scoping refinement,
Total Prior Amendments	0	Last Amendment	N/A	Date of Last Amendment	N/A	Last MTIP Amend Num Not Applicable
Last Amendment Action	Not Applicable					

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes Limits cross several EFA sections with various "yes" designations for POC, LEP, and LI
	N/A			X		X		
Added notes:								

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: Pavement resurfacing and/or rehabilitation.
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# 12094 - Highway Pavement Maintenance: 2023-2030
RTP Project Description:	Pavement rehabilitation/repair projects includes overlays, slurry seals, full pavement replacement, and other minor roadway improvements (curb and gutters, adding/widening shoulders) that do not add motor vehicle capacity.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	Throughway
Yes	Transit	Light Rail Transit
Yes	Freight	Main Roadway Routes and Branch Rail Lines
Yes	Bicycle	Bicycle Parkway
No	Pedestrian	None

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	I-84	NHS Interstate
Functional Classification	Yes	I-84	Urban Interstate
Federal Aid Eligible Facility	Yes	I-84	1 = Interstate

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 # 2.1 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.
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.

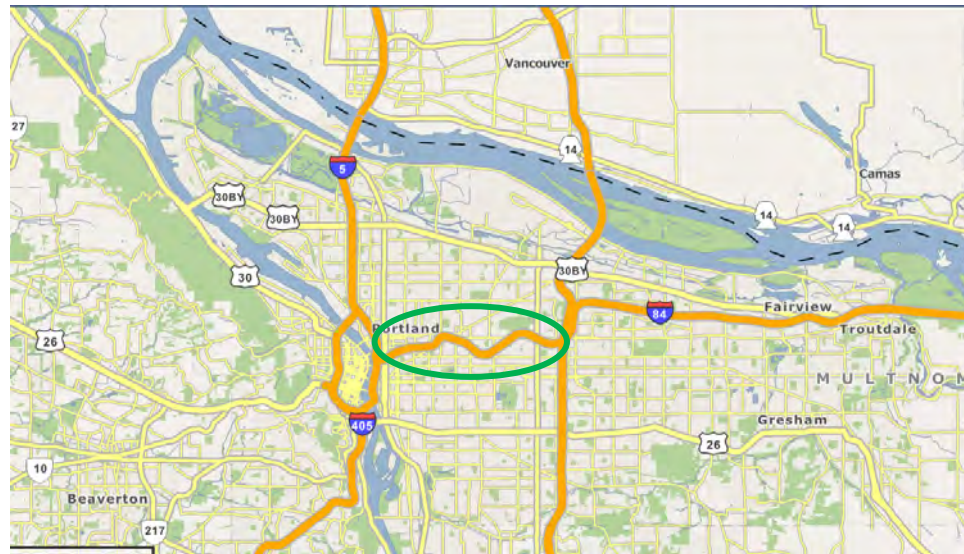
Public Notification/Opportunity to Comment Consistency Requirement	
1.	Is a 30-day/opportunity to comment period required as part of the amendment? Yes.
2.	What are the start and end dates for the comment period? Estimated to be July 2, 2024 to July 30, 2024
3.	Was the comment period completed consistent 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? Comments are 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

State	General state funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
NHPP	A federal funding source (FHWA based) appropriated to the State DOT. The purposes of this program are: to provide support for the condition and performance of the National Highway System (NHS); to provide support for the construction of new facilities on the NHS; 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; and [NEW] to provide support for activities to increase the resiliency of the NHS to mitigate the cost of damages from sea level rise, extreme weather events, flooding, wildfires, or other natural disasters. [§ 11105(1); 23 U.S.C. 119(b)]

Name: I-84: NE Martin Luther King Jr Blvd - I-205		Key: 23410	
Description: Design for pavement resurfacing to repair ruts and surface wear.		Region: 1	
MPO: Portland Metro MPO		Work Type: PRESRV	
Applicant: ODOT		Status: PROJECT FUNDED THROUGH FINAL PLANS	
Location(s)-			
Mileposts	Length	Route	Highway
0.40 to 7.12	6.72	I-84	COLUMBIA RIVER
		ACT	County(s)
		REGION 1 ACT	MULTNOMAH
Current Project Estimate			
	Planning	Prelim. Engineering	Right of Way
Year		2025	
Total		\$1,871,000.00	
Fund 1		Y002 \$1,725,436.20	
Match			
Fund 2		S070 \$145,563.80	
Match			
Project Total			
			\$1,871,000.00

Footnote:





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

MTIP Formal Amendment
ADD NEW PROJECT
 Add the ODOT funded RTO PGB
 bucket to the MTIP

Project #2

Project Details Summary							
ODOT Key #	23676	RFFA ID:	N/A	RTP ID:	11054	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1250	

Summary of Amendment Changes Occurring:
 The formal MTIP amendment adds the ODOT fund project grouping bucket (PGB) supporting Regional Travel Options (RTO) activities for Metro. The RTO program creates safe, vibrant and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use. ODOT funding is being pulled from similar non-MPO PGBs. Funding source includes \$461,189.80 from project Key 23147, \$438,454.69, from project Key 23048, and \$563,230.67 from project Key 23397. Keys 23147, 23048, and 23397 are outside the MPO programming boundary. They will be updated in the STIP, but do not need updates in the MTIP.

Project Name:	Metro Transportation Options FFY25 - FFY27						
Lead Agency:	Metro	Applicant:	Metro		Administrator:	ODOT	
Certified Agency Delivery:	Yes	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	No	

Short Description:
 Metro funding to promote and encourage the use of alternative transportation options during federal fiscal years 2025, 2026 and 2027.

MTIP Detailed Description (Internal Metro use only):
 Region-wide PGB supporting Metro's RTO program that creates safe, vibrant and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use. (FFY 2025-27 allocation, Y240/State STBG initial fund code)

STIP Description:
 Metro funding to promote and encourage the use of alternative transportation options during federal fiscal years 2025, 2026 and 2027.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Roadway	Roadway - Motor Vehicle	New Capacity - General Purpose	Capital Improvement
ODOT Work Type:	OP-TDM		

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	2025						\$ 1,312,638	\$ 1,312,638
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,312,638	\$ 1,312,638

State Funds

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	Match	2025						\$ 150,237	\$ 150,237
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,237	\$ 150,237

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:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,462,875	\$ 1,462,875
Total Estimated Project Cost							\$ 1,462,875
Total Cost in Year of Expenditure:							\$ 1,462,875

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:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,462,875	\$ 1,462,875
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,237	\$ 150,237
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,312,638	\$ 1,312,638
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,237	\$ 150,237
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,462,875	\$ 1,462,875

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%	10.27%	10.27%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
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%	89.73%	89.73%
State	0.0%	0.0%	0.0%	0.0%	0.0%	10.27%	10.27%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
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:							
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
						Estimated Project Completion Date:	12/31/2028
Completion Date Notes:	The State STBG fund obligation is assumed to be through FHWA's FMIS system and not flex transferred to FTA.						
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? ODOT State Surface Transportation Block Grant (STBG) funds
2. Does the amendment include changes or updates to the project funding? Yes. New State STBG is being added to the MTIP.
3. Was proof-of-funding documentation provided to verify the funding change? Yes. ODOT cited the existing PGBs where the funding is being shifted.
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? ODOT program manager 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	2025	Years Active	0	Project Status	0	No activity.	
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	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes Other possible performance measure may apply once specific locations are identified
					X			
Added notes:								

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 non-profit 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
No	Transit	Not Applicable
No	Freight	Not Applicable
No	Bicycle	Not Applicable
No	Pedestrian	Not Applicable

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? Yes.
3a. If yes, is an amendment required to the UPWP? A separate budget amendment will need to occur to reflect the new funding.
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)? Metro funded stand-alone project.
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.
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 July 2, 2024 to July 30, 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

State	General state funds committed to the project 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.

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 I/JA	100.00%	1,462,875.16	89.73%	1,312,637.88	10.27%	150,237.28	0.00%	0.00
OT Totals			100.00%	1,462,875.16		1,312,637.88		150,237.28		0.00
Grand Totals						1,312,637.88		150,237.28		0.00

Source of Funding for Key 23676	State STBG	State Match
\$461,190 from Key 23147	\$413,826	\$47,364
\$ 438,455 from Key 23048	\$393,425	\$45,030
\$563,230 from Key 23397	\$505,386	\$57,844
\$1,462,875 total	\$1,312,637	\$150,238

Name: **Transportation Options Provider Grants FY25-26**

Key: **23147**

Description **Funding to promote and encourage the use of alternative transportation options during federal fiscal years 2025 and 2026.**

Region: **6**

MPO: **Non-MPO**

Work Type: **OP-TDM**

Applicant: **ODOT**

Status: **NON-CONSTRUCTION PROJECT**

Location(s)-

Mileposts	Length	Route	Highway	ACT	County(s)
				STATEWIDE	STATEWIDE

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year						2025	
Total						\$2,507,522.57	\$2,507,522.57
Fund 1						Y240 \$2,250,000.00	
Match						\$257,522.57	

Footnote:

2024-2027 Active STIP

STATEWIDE

2024-2027 Active STIP

Name: **ECO Rule Implementation FY25, 26 and 27**

Key: **23048**

Description **Commuter-focused program to support new Employee Commute Options (ECO) rule implementation.**

Region: **6**

MPO: **Non-MPO**

Work Type: **OP-TDM**

Applicant: **ODOT**

Status: **NON-CONSTRUCTION PROJECT**

Location(s)-

Mileposts	Length	Route	Highway	ACT	County(s)
				STATEWIDE	STATEWIDE

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year						2025	
Total						\$2,228,908.95	\$2,228,908.95
Fund 1						Y240 \$2,000,000.00	
Match						\$228,908.95	

Footnote:

Name: **Innovative Mobility Federal Competitive Grants FFY24**

Key: **23397**

Description **Federal funding for competitive grants and contracted services to assist the transportation needs of historically marginalized groups during federal fiscal year 2024. Projects will be selected based on requirements of funds.**

Region: **6**

MPO: **Non-MPO**

Work Type: **OPERAT**

Applicant: **ODOT**

Status: **NON-CONSTRUCTION PROJECT**

Location(s)-

Mileposts	Length	Route	Highway	ACT	County(s)
				STATEWIDE	STATEWIDE

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year						2025	
Total						\$6,615,635.80	\$6,615,635.80
Fund 1						Y240 \$5,936,210.00	
Match						\$679,425.80	

Footnote:

Most Recent Approved Amendment

Amendment No: **24-27-1052**

Approval Date: **4/15/2024**

Requested Action: **Slip the project to start in federal fiscal year 2025.**



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

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new safety PGB by
 combining funds from Key 22613

Project #3

Project Details Summary							
ODOT Key #	23671	RFFA ID:	N/A	RTP ID:	N/A	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1	STIP Amendment ID:		24-27-1240		

Summary of Amendment Changes Occurring:
 The formal MTIP amendment adds the new safety PGB providing safety signage upgrades by combining funds from Key 22613.

Project Name:	Portland Metro & Surrounding Areas Signing						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes	

Short Description:
 Various signing upgrades in Region 1 corridors for safety and maintenance improvements. Locations to be determined as needed based on investigations. This will allow for quicker response to safety concerns.

MTIP Detailed Description (Internal Metro use only):
 At various highway corridor locations across Region 1, install safety signage upgrades for motorist safety and maintenance improvements. Specific locations to be determined from scoping and specific investigations to address priority safety concerns.

STIP Description:
 Various signing upgrades on Region 1 corridors for safety and maintenance improvements. Locations to be determined as needed based on investigations. This will allow for quicker response to safety concerns.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	System Management and Operations	Systems Management, ITS, and Operations
ODOT Work Type:	Safety		

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	2025		\$ 91,710					\$ 91,710
HB2017	S070	2025					\$ 275,127		\$ 275,127
									\$ -
State Totals:			\$ -	\$ 91,710	\$ -	\$ -	\$ 275,127	\$ -	\$ 366,837

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:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals	\$ -	\$ 91,710	\$ -	\$ -	\$ 275,127	\$ -	\$ 366,837
Total Estimated Project Cost							\$ 366,837
Total Cost in Year of Expenditure:							\$ 366,837

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed. The funds are being transferred to new Key 23671.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ 91,710	\$ -	\$ -	\$ 275,127	\$ -	\$ 366,837
Phase Change Percent:	0.0%	100.0%	0.0%	0.0%	100.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	0.00%	N/A	N/A	0.00%	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	\$ -	\$ 91,710	\$ -	\$ -	\$ 275,127	\$ -	\$ 366,837
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ 91,710	\$ -	\$ -	\$ 275,127	\$ -	\$ 366,837

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%	0.0%	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%	0.0%	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%	25.0%	0.0%	0.0%	75.0%	0.0%	100.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	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:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
					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	

Fiscal Constraint Consistency Review
1. What is the source of funding? Original source was to be HB2017. Now, not applicable
2. Does the amendment include changes or updates to the project funding? Yes, all funds are being transferred to new Key 23671.
3. Was proof-of-funding documentation provided to verify the funding change? Yes
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? OTC action is required, expected 8-1.2024
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	Various	Various	Various	Various
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	2025	Years Active	0	Project Status	1	Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.).
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	Not Applicable	Last MTIP Amend Num
Last Amendment Action	Not Applicable					

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes The safety PGB is regional.
						X		
Added notes: Safety upgrades at specific locations will be addressed as part of the ongoing performance measures monitoring process.								

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 -Traffic control devices and operating assistance other than signalization projects
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
No	Motor Vehicle	Not Applicable
No	Transit	Not Applicable
No	Freight	Not Applicable
No	Bicycle	Not Applicable
No	Pedestrian	Not Applicable

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 # 2 - Safe System: Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.
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 July 2, 2024 to July 30, 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

HB2017	State funding that originates from Oregon House Bill 2017. HB2017 made a significant investment in transportation to help further the things Oregonians value, such as a vibrant economy with good jobs, choices in transportation, a healthy environment, and safe communities
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Key Number: 23671 **2024-2027 STIP**

Project Name: Portland Metro & surrounding areas signing **(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%	91,710.00	0.00%	0.00	100.00%	91,710.00	0.00%	0.00
	PE Totals		100.00%	91,710.00		0.00		91,710.00		0.00
CN	S070	HB2017 Funding Package	100.00%	275,127.00	0.00%	0.00	100.00%	275,127.00	0.00%	0.00
	CN Totals		100.00%	275,127.00		0.00		275,127.00		0.00
Grand Totals				366,837.00		0.00		366,837.00		0.00

2024-2027 Active STIP		CLACKAMAS		2024-2027 Active STIP			
Name: Portland Metro and surrounding areas safety reserve			Key: 22613				
Description: Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.					Region: 1		
MPO: Non-MPO		Work Type: SAFETY					
Applicant: ODOT		Status: BUCKET OF FUNDS					
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	CLACKAMAS		
				REGION 1 ACT	HOOD RIVER		
				REGION 1 ACT	MULTNOMAH		
				REGION 1 ACT	WASHINGTON		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2024		
Total					\$366,837.85		\$366,837.85
Fund 1				ACPO	\$330,154.06		
Match					\$36,683.79		
Footnote:							
Most Recent Approved Amendment							
Amendment No: 24-27-0392				Approval Date: 10/31/2023			

Funding for Key 23671 originates by combining funding into 23671 from Key 22613 at left



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

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new 2023 RTP awarded project to the MTIP

Project #4

Project Details Summary							
ODOT Key #	23658	RFFA ID:	N/A	RTP ID:	N/A	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1213	

Summary of Amendment Changes Occurring:
 The formal MTIP amendment adds the new OPRD Tualatin Rive Trail RTP funded project to the MTIP. The project is located on the Metro Pedestrian and Bicycle networks resulting in its classification as a regionally significant project. MTIP programming is required in support of federal delivery approval steps and performance measures reporting,

Project Name:	Tualatin River Water Trail Access Enhancements						
Lead Agency:	Tualatin Riverkeepers	Applicant:	Tualatin Riverkeepers	Administrator:	OPRD (Oregon Parks and Rec)		
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No	Delivery as Direct Recipient:	Yes		

Short Description:
 Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.

MTIP Detailed Description (Internal Metro use only):
 In Southern Tigard, across Tualatin, and wester Durham along the Tualatin River from SW 108th Ave and east/southeast to east of SW 50th Ave, complete access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter (Inclusion in Metro Ped and Bicycle networks) 2023 RTP grant award.)

STIP Description:
 Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Active Transportation/ Complete Streets	Active Trans - Multi-use Path	Other	Other
ODOT Work Type:	BIKPED		

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									
RTP (IIJA)	Y940	2025						\$ 33,660	\$ 33,660
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,660	\$ 33,660

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						\$ 28,000	\$ 28,000
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,000	\$ 28,000

Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ -	\$ 61,660	\$ 61,660
Total Estimated Project Cost									\$ 61,660
Total Cost in Year of Expenditure:									\$ 61,660

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:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 61,660	\$ 61,660
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,000	\$ 28,000
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	N/A	45.41%	45.41%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,660	\$ 33,660
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,000	\$ 28,000
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 61,660	\$ 61,660

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	0.0%	54.6%	54.6%
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%	45.4%	45.4%
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%	54.6%	54.6%
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%	45.4%	45.4%
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:							
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
						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	

Fiscal Constraint Consistency Review
1. What is the source of funding? Federal Recreational Trails Program (RTP) funds.
2. Does the amendment include changes or updates to the project funding? Yes, new federal RTP funds are added to the MTIP.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via the official 2023 RTP award list.
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? OPRD 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
	Tualatin River Trail		SW 80th Ave		SW 50th Ave
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	2025	Years Active	0	Project Status	1	Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.).
Total Prior Amendments	0	Last Amendment	N/A	Date of Last Amendment	N/A	Last MTIP Amend Num Not Applicable
Last Amendment Action	Not Applicable. The formal amendment represent the initial project programming in the MTIP.					

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes Equity POC=Yes, LEP = Yes, LI = Yes
				X	X			
Added notes:								

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 - Bicycle and Pedestrian Facilities
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# 10744 - Tualatin River Pathway
RTP Project Description:	Fill in system gaps from eastern city limits to western city limits.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
No	Motor Vehicle	No designation
No	Transit	No designation
No	Freight	No designation
Yes	Bicycle	Regional Bikeway (Tualatin River Greenway Trail)
Yes	Pedestrian	Regional Pedestrian Corridor

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? Yes
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.	<p>Applicable RTP Goal:</p> <p><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.</p> <p><u>Goal #3 - Equitable Transportation:</u> 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.</p>
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

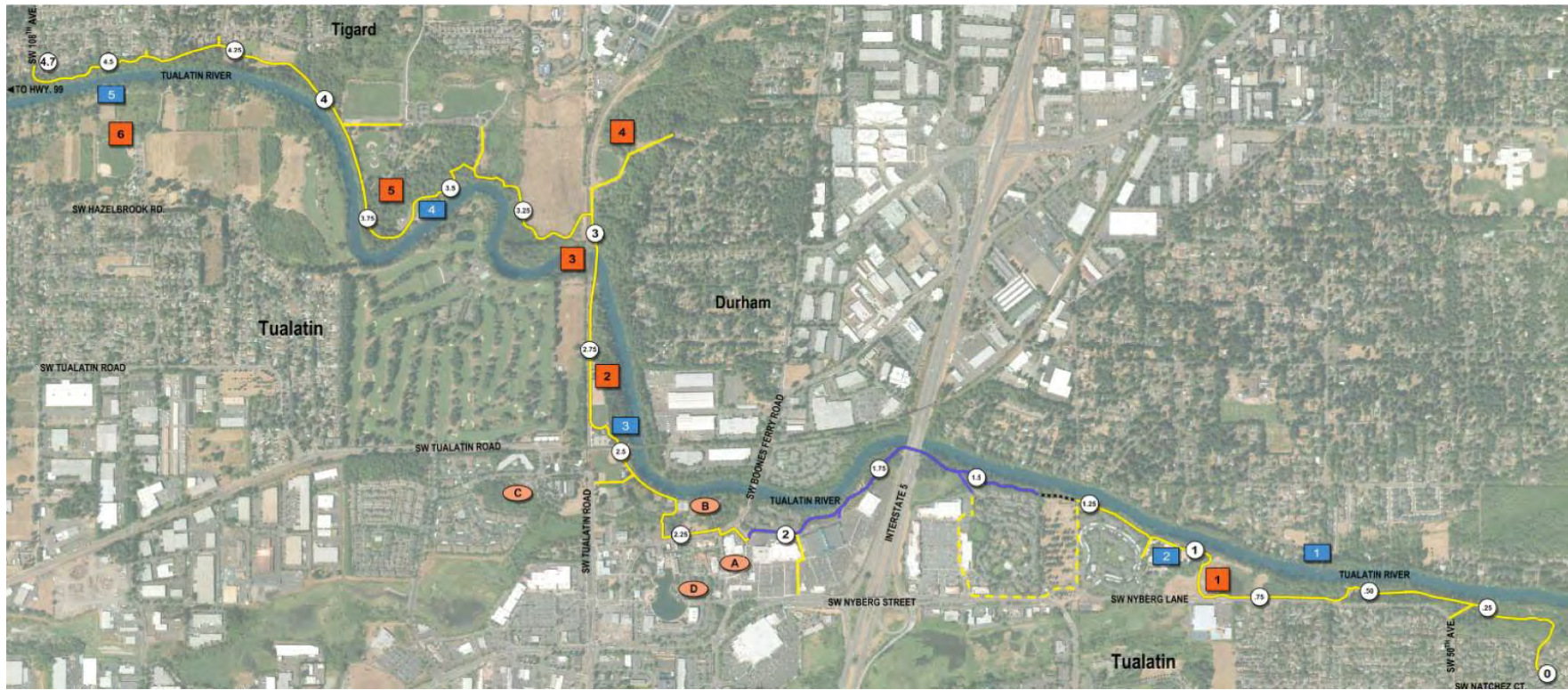
1.	Is a public notification/opportunity to comment period required as part of the amendment? Yes.
2.	What are the start and end dates for the comment period? Estimated to be July 2, 2024 to July 30, 2024
3.	Was the comment period completed consistent with the Metro Public Participation Plan? Yes.
4.	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? Comments are 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
RTP	Recreational Trails Program. A federal funding source (FHWA based) that provides funds to the States to develop and maintain recreational trails and trail-related facilities for motorized and nonmotorized recreational trail uses. RTP funds are a special set-aside group of funds under STBG funding program

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
OT	Y940	Recreational trail program (RTP) IJJA	100.00%	61,660.00	55.00%	33,660.00	0.00%	0.00	45.00%	28,000.00
	OT Totals		100.00%	61,660.00		33,660.00		0.00		28,000.00
Grand Totals				61,660.00		33,660.00		0.00		28,000.00

2023 Recreational Trails Program (RTP) Grants				
Project Name	Project Sponsor	Project Description	Total Project Cost	Grant Request Amount
<i>Non-Motorized</i>				
Cline Buttes Mountain Bike Trail Construction*	Central Oregon Trail Alliance	This is phase one of a multi-phase project to expand the Cline Butte and Cascade View mountain bike trail systems by building new trail, rerouting existing trails, building a trailhead, and adding signage.	\$183,050	\$145,470
Little North Santiam Trail Reconstruction	National Forest Foundation	Post-fire reconstruction of the Little North Santiam Trail on the Detroit Ranger District of the Willamette National Forest. To include construction of bridges, staircase, puncheon, and retaining walls.	\$290,100	\$144,500
Millicoma Marsh Improvement Project 2.0*	Coos Bay School District 9	Restoration of the Millicoma Marsh Trail and purchase of maintenance tools	\$74,877	\$59,875
Jack-Ash Trail Construction Phase 2 Completion*	Siskiyou Upland Trails Association	Construct new non-motorized trails for Phase II of the Jack-Ash Trail project in Jackson County, OR. Install interpretive sign, waypoint and trailhead signage.	\$95,849	\$76,679
Tualatin River Water Trail Access Enhancements	Tualatin Riverkeepers	Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.	\$61,660	\$33,660
Mt. Ashland Bull Gap Trail Conversion*	Rogue Valley Mountain Bike Association	The Bull Gap Road to Trail Conversion would convert a degraded Forest Service road into two separate trails - a dual direction multi-use trail and a descending mountain bike trail.	\$149,909	\$117,212



Tualatin River Water Trail





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

MTIP Formal Amendment
COMBINE FUNDS
 Transfer all funds to new safety
 signage PGB in Key 23671

Project #5

Project Details Summary							
ODOT Key #	22613	RFFA ID:	N/A	RTP ID:	N/A	RTP Approval Date:	11/30/2023
MTIP ID:	71337	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1240	

Summary of Amendment Changes Occurring:
 The formal MTIP amendment commits and transfers the available funding to ODOT new safety signage PGB in Key 23671. Key 23671 is also part of this amendment bundle. As a result, Key 22613 is left "zero programmed".

Project Name:	Portland Metro and Surrounding Areas Safety Reserve						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes	

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

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

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

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	System Management and Operations	Systems Management, ITS, and Operations
ODOT Work Type:	Safety		

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									
ADVCON	ACPO	2024					330,154		\$ -
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	Match	2024					37,788		\$ -
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ 37,788	\$ -	\$ -

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:		\$ -	\$ -	\$ -	\$ -	367,942	\$ -	367,942
Amended Programming Totals		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Estimated Project Cost								\$ -
Total Cost in Year of Expenditure:								\$ -

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed. The funds are being transferred to new Key 23671.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ -	\$ -	\$ -	\$ (367,942)	\$ -	\$ (367,942)
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	-100.0%	0.0%	-100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	0.00%	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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

0

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated							Aid ID
Federal Funds Obligated:							
EA Number:							FHWA or FTA
Initial Obligation Date:							N/A
EA End Date:							FMIS or TRAMS
Known Expenditures:							N/A
					Estimated Project Completion Date:		Not Applicable
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? Original source was to be HB2017. Now, not applicable	
2. Does the amendment include changes or updates to the project funding? Yes, all funds are being transferred to new Key 23671.	
3. Was proof-of-funding documentation provided to verify the funding change? Yes	
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? OTC action is required, expected 8-1.2024	
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	Various	Various	Various	Various
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	1	Project Status	2	Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)	
Total Prior Amendments	2	Last Amendment	Administrative	Date of Last Amendment	August 2023	Last MTIP Amend Num	AM23-25-AUG4
Last Amendment Action	PHASE SLIP & COST ADJUSTMENT: Cons slipped to FFY 2024. Programming amount reduced based on current STIP programming level						

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
	N/A							
Added notes:								

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 -Traffic control devices and operating assistance other than signalization projects
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
No	Motor Vehicle	Not Applicable
No	Transit	Not Applicable
No	Freight	Not Applicable
No	Bicycle	Not Applicable
No	Pedestrian	Not Applicable

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 # 2 - Safe System: Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.
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 July 2, 2024 to July 30, 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	
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
State	General state funds used like local funds to provide the minimum match requirement to the federal funds,

Key Number: **22613**

2024-2027 STIP

Project Name: **Portland Metro and surrounding areas safety**

(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
CN	ACPO	ADVANCE CONSTRUCT PR	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	CN Totals		0.00%	0.00		0.00		0.00		0.00
Grand Totals				0.00		0.00		0.00		0.00



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

MTIP Formal Amendment
COST INCREASE
 Update PE phase obligations and add
 Cons phase funds

Project #6

Project Details Summary							
ODOT Key #	22431	RFFA ID:	N/A	RTP ID:	N/A	RTP Approval Date:	11/30/2023
MTIP ID:	71247	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1268	

Summary of Amendment Changes Occurring:
 The MTIP formal amendment corrects a programming discrepancy between the MTIP and STIP (corrects and updates the per phase obligations) and adds funding to the construction phase to address a funding shortfall. The net cost change to the project results in an increase of almost 40% which well above the 20% administrative cost change threshold. This triggers the need to complete the cost changes as a formal/full amendment. The cost increase results from a ADA curb upgrade from 96 to 115 now as well as inflation impacts tot he project.

Project Name:	OR141/OR217 Curb Ramps						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	Yes		Delivery as Direct Recipient:	No	

Short Description:
 At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.

MTIP Detailed Description (Internal Metro use only):
 On OR 141 (Hall Blvd at two locations between MP 4.97 to 7.07) and on SW 72nd Ave (between SW Beveland Rd to SW Varnes St) in the Tigard area, construct ADA compliant curbs and ramps for safety improvements **impacting up to 115 planned curb upgrades.** (ADA PGB)

STIP Description:
 Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Project Classification Details

Project Type	Category	Features	System Investment Type
Active Transportation/ Complete Streets	Active Trans - Pedestrian	Sidewalk Reconstruction	Capital Improvement
ODOT Work Type:	ADAP		

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	Z24E	2021		\$ 851,830					\$ 851,830
State STBG	Y240	2021		\$ 1,279,257					\$ -
State STBG	Y240	2021		\$ 1,727,907					\$ 1,727,907
State STBG	Y240	2023			\$ 748,348				\$ -
State STBG	Y240	2023			\$ 183,049				\$ 183,049
State STBG	Z240	2023			\$ 565,299				\$ 565,299
State STBG	Y240	2024					\$ 3,866,715		\$ -
State STBG	Y240	2025					\$ 3,866,715		\$ 3,866,715
AC-GARVEE	ACPO	2025					\$ 2,221,465		\$ 2,221,465
Federal Totals:			\$ -	\$ 2,579,737	\$ 748,348	\$ -	\$ 6,088,180	\$ -	\$ 9,416,265

State Funds

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (Z24E)	Match	2021		\$ 97,496					\$ 97,496
State (Y240)	Match	2021		\$ 146,417					\$ -
State (Y240)	Match	2021		\$ 197,767					\$ 197,767
State (Y240)	Match	2023			\$ 85,652				\$ -
State (Y240)	Match	2023			\$ 20,951				\$ 20,951
State (Z240)	Match	2023			\$ 64,701				\$ 64,701
State (Y240)	Match	2024					\$ 442,563		\$ -
State (Y240)	Match	2025					\$ 442,563		\$ 442,563
State (AC)	Match	2025					\$ 254,257		\$ 254,257
State Totals:			\$ -	\$ 295,263	\$ 85,652	\$ -	\$ 696,820	\$ -	\$ 1,077,735

Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Programming Summary									
Phase Totals		Planning	PE	ROW	UR	Cons	Other	Total	
Existing Programming Totals:		\$ -	\$ 2,375,000	\$ 834,000	\$ -	\$ 4,309,278	\$ -	\$ 7,518,278	
Amended Programming Totals		\$ -	\$ 2,875,000	\$ 834,000	\$ -	\$ 6,785,000	\$ -	\$ 10,494,000	
								Total Estimated Project Cost	\$ 10,494,000
								Total Cost in Year of Expenditure:	\$ 10,494,000
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:		\$ -	\$ 500,000	\$ -	\$ -	\$ 2,475,722	\$ -	\$ 2,975,722	
Phase Change Percent:		0.0%	21.1%	0.0%	0.0%	57.5%	0.0%	39.6%	
Amended Phase Matching Funds:		\$ -	\$ 295,263	\$ 85,652	\$ -	\$ 696,820	\$ -	\$ 1,077,735	
Amended Phase Matching Percent:		N/A	10.27%	10.27%	N/A	10.27%	N/A	10.27%	
Phase Programming Summary Totals									
Fund Category		Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total	
Federal		\$ -	\$ 2,579,737	\$ 748,348	\$ -	\$ 6,088,180	\$ -	\$ 9,416,265	
State		\$ -	\$ 295,263	\$ 85,652	\$ -	\$ 696,820	\$ -	\$ 1,077,735	
Local		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total		\$ -	\$ 2,875,000	\$ 834,000	\$ -	\$ 6,785,000	\$ -	\$ 10,494,000	

Phase Composition Percentages							
Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	89.73%	89.73%	0.0%	89.73%	0.0%	89.73%
State	0.0%	10.27%	10.27%	0.0%	10.27%	0.0%	10.27%
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%	24.58%	7.13%	0.0%	58.02%	0.0%	89.73%
State	0.0%	2.81%	0.82%	0.0%	6.64%	0.0%	10.27%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	27.4%	7.9%	0.0%	64.7%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ 2,875,000	\$ 834,000				Aid ID
Federal Funds Obligated:		\$ 2,579,737	\$ 748,348				SA00(448)
EA Number:		PE003333	R9894000				FHWA or FTA
Initial Obligation Date:		8/31/2021	7/27/2023				FHWA
EA End Date:		Not Available	Not Available				FMIS or TRAMS
Known Expenditures:		Not Available	Not Available				FMIS
						Estimated Project Completion Date:	12/31/2028
Completion Date Notes: Estimate only							
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? Primarily ODOT Surface Transportation Block Grant Funds (STBG)
2. Does the amendment include changes or updates to the project funding? Yes, AC funds are added to the construction phase.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via STIP Impacts Worksheet
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? OTC approval is required - Concurrent with August.
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	OR141 (SW Hall Blvd)	4.97	7.07	2.1
		SW 72nd Ave	6.56	6.84	0.28

Cross Streets	Route or Arterial	Cross Street	Cross Street
	SW Hall Blvd	SW Garden Pl	SW Durham Rd
	SW 72nd Ave	SW Beveland Rd	SW Varnes St

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2021	Years Active	4	Project Status	5	(RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation.	
Total Prior Amendments	4	Last Amendment	Formal	Date of Last Amendment	November 2023	Last MTIP Amend Num	NV23-03-NOV
Last Amendment Action	COST INCREASE: The formal amendment addresses a cons phase funding shortfall by adding OTC approved IJA funds.						

Anticipated Required Performance Measurements Monitoring

Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes Equity POC = Yes LEP = Yes LI = Yes
				X		X		

Added notes:

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 - Safety
Exemption Reference:	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.
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Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	OR141 & 72nd Ave = Minor Arterial
Yes	Transit	OR141 = Frequent Bus
No	Freight	OR141 = No designation
Yes	Bicycle	OR141 = Bicycle Parkway and Regional Bikeway in places, 72nd Ave = Regional Bikeway
Yes	Pedestrian	OR141 = Pedestrian Parkway, 72nd Ave - Regional Pedestrian Corridor

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	No	OR141	No designation for either SW Hall Blvd or 72nd Ave in the project limits
Functional Classification	Yes	OR141	4 = Minor Arterial
Federal Aid Eligible Facility	Yes	OR141	Urban Minor 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? 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 Goals:
Goal # 2- Safe System:
 Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.
Goal # 3 - Equitable Transportation:
 Objective 3.1 - Transportation Equity: 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 July 2, 2024 to July 30, 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? Comments are 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	
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-GARVEE	Advanced Construction committed funds with the anticipated conversion code to be GARVEE bond 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.
State	General state funds committed by the lead agency that normally will cover the minimum match requirement to the federal funds.

Key Number: **22431**

2024-2027 STIP

Project Name: **OR141/OR217 curb ramps**

(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	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA	66.98%	1,925,674.00	89.73%	1,727,907.28	10.27%	197,766.72	0.00%	0.00
	Z24E	Surface transportation block grants - flex FAST ext	33.02%	949,326.00	89.73%	851,830.22	10.27%	97,495.78	0.00%	0.00
	PE Totals			100.00%	2,875,000.00		2,579,737.50		295,262.50	
RW	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA	24.46%	204,000.00	89.73%	183,049.20	10.27%	20,950.80	0.00%	0.00
	Z240	SURFACE TRANSP BLOCK GRTS-FLEX	75.54%	630,000.00	89.73%	565,299.00	10.27%	64,701.00	0.00%	0.00
	RW Totals			100.00%	834,000.00		748,348.20		85,651.80	
CN	ACPO	ADVANCE CONSTRUCT PR	36.49%	2,475,722.00	89.73%	2,221,465.35	10.27%	254,256.65	0.00%	0.00
	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA	63.51%	4,309,278.00	89.73%	3,866,715.15	10.27%	442,562.85	0.00%	0.00
	CN Totals			100.00%	6,785,000.00		6,088,180.50		696,819.50	
Grand Totals					10,494,000.00		9,416,266.20		1,077,733.80	0.00

Overview

We are bringing sidewalk curb ramps into compliance with Americans with Disabilities Act (ADA) accessibility standards on highways throughout Oregon including OR 141 (SW Hall Boulevard) and 72nd Avenue. These upgrades create safer and more accessible highway connections for all sidewalk users.

We will upgrade over 120 sidewalk curb ramps at approximately 90 intersections in Tigard along SW Hall Boulevard between Oregon 99W and Durham Road, and on SW 72nd Avenue between Gonzaga Street and Varns Street, making them ADA compliant. Work includes:

Upgrading existing ADA curb ramps

- This improvement will allow all users, including people in wheelchairs and using mobility aids, to make a smooth transition from the street to the sidewalk.

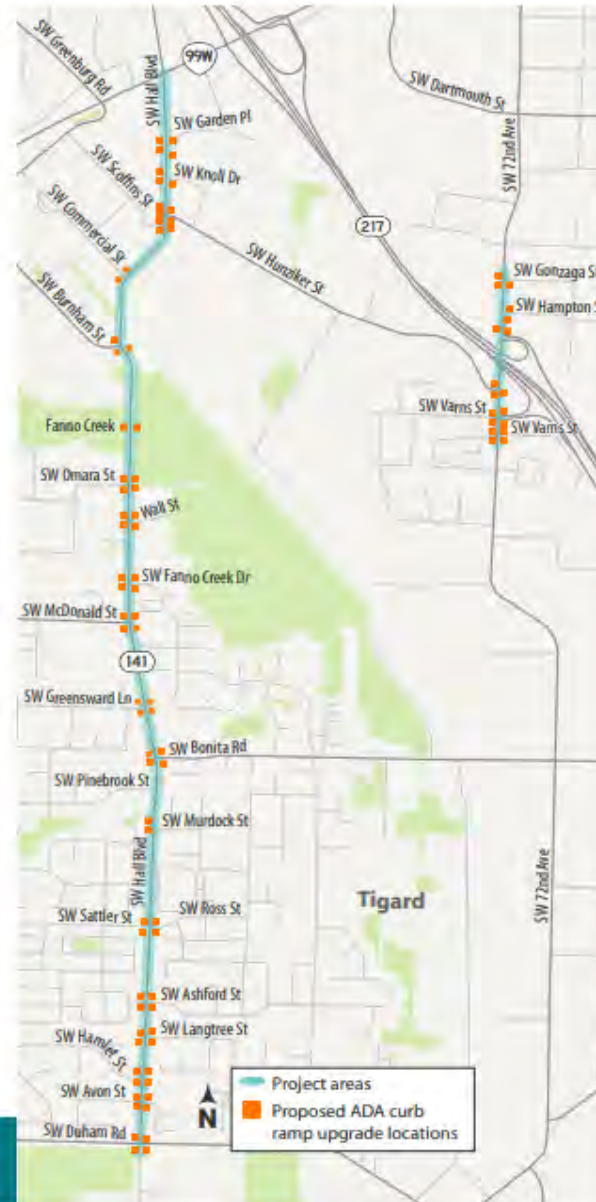
Lowering crosswalk buttons and installing audible pedestrian signals

- These upgrades help all pedestrians cross the street safely by accessing the crosswalk button at signalized intersections and providing an audible cue for the crosswalk signal.

Restriping and realigning crosswalks

- These upgrades will improve visibility and create a direct path from curb-to-curb, increasing pedestrian safety while crossing the street.

The project is currently in design and is scheduled to start construction in 2025.





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

MTIP Formal Amendment
COST INCREASE
 Update PE and ROW phases, add funds to construction phase

Project #7

Project Details Summary							
ODOT Key #	21178	RFFA ID:	N/A	RTP ID:	11742	RTP Approval Date:	11/30/2023
MTIP ID:	71033	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-10-JUL1		STIP Amendment ID:		24-27-1291	

Summary of Amendment Changes Occurring:
 The MTIP formal amendment updates the funding levels in PE and ROW, plus adds new funds to support the construction phase. Construction is now in FFY 2025. As a result the total project cost increases to \$158 million from 119 million which equals a 33% cost increase and is above the 20% threshold for administrative cost changes. The construction phase cost increase is cited as inflationary impacts to the project.

Project Name:	US26 (Powell Blvd): SE 99th Ave - East City Limits						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	Yes		Delivery as Direct Recipient:	No	

Short Description:
 On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings.

MTIP Detailed Description (Internal Metro use only):
 On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings. Phase 2 includes all segments except Segment 2: 122th Ave to SE 136th Ave which is in Key 19690 . (HB2017 awarded project, \$110,000,000 original award) (\$66 million in construction in 2022)

STIP Description:
 Widen street to three lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility and to add enhanced pedestrian and bike crossings. This project is intended to provide a safer continuous travel facility for multiple modes of travel and allow for a more connected neighborhood.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	New capacity - general purpose	Capital Improvement
	Highway - Pedestrian	Protected parallel facility	
	Highway - Bicycle	Protected parallel facility	
ODOT Work Type:	MODERN		

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									
NHPP	Y001	2018		\$ 1,435,680					\$ 1,435,680
AC-HB2017	ACP0	2018		\$ 15,432,600					\$ 15,432,600
State-STBG	Y240	2020			\$ 256,936				\$ -
AC-HB2017	ACP0	2021				\$ 1,004,167			\$ 1,004,167
NHPP	Y001	2022						\$ 623,624	\$ -
NHPP	Y001	2022						\$ 123,032	\$ 123,032
AC-HB2017	ACP0	2022						\$ 1,000,000	\$ -
State-STBG	Y240	2024					\$ 11,143,260		\$ -
State STBG	Y240	2025					\$ 11,900,788		\$ 11,900,788
AC-HB2017	ACP0	2024					\$ 54,580,939		\$ -
ADVCON	ACP0	2025					\$ 82,272,839		\$ 82,272,839
Federal Totals:			\$ -	\$ 16,868,280	\$ -	\$ 1,004,167	\$ 94,173,627	\$ 123,032	\$ 112,169,106

Note: Construction phase Advance Constructions funding will draw from the SW Great Streets program. Specific fund code TBD

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (Y001)	Match	2018		\$ 164,320					\$ 164,320
ACS-HB2017	ACPO	2018		\$ 16,346,000					\$ -
State (ACPO)	Match	2018		\$ 1,766,330					\$ 1,766,330
State (Y240)	Match	2020			\$ 29,407				\$ -
ACS-HB2017	ACPO	2020			\$ 24,040,000				\$ 24,040,000
HB2017	S070	2020			\$ 814,000				\$ 814,000
State (AC)	Match	2021				\$ 114,931			\$ 114,931
State (Y001)	Match	2022						\$ 71,337	\$ -
State (Y001)	Match	2022						\$ 14,082	\$ 14,082
HB2017	S070	2022						\$ 557,886	\$ 557,886
State (Y240)	Match	2024					\$ 1,275,396		\$ -
State (Y240)	Match	2025					\$ 1,362,098		\$ 1,362,098
State (AC)	Match	2024					\$ 6,247,033		\$ -
State (AC)	Match	2025					\$ 6,555,133		\$ 6,555,133
HB2017	S070	2025					\$ 5,442,114		\$ 5,442,114
State Totals:			\$ -	\$ 1,930,650	\$ 24,854,000	\$ 114,931	\$ 13,359,345	\$ 571,968	\$ 40,830,894

Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Other	OTH0	2018		\$ 231,500					\$ 231,500
Other	OTH0	2025					\$ 5,555,100		\$ 5,555,100
Local Totals:			\$ -	\$ 231,500	\$ -	\$ -	\$ 5,555,100	\$ -	\$ 5,786,600

Phase Totals		Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:		\$ -	\$ 18,177,500	\$ 25,140,343	\$ 1,119,098	\$ 73,246,628	\$ 1,694,961	\$ 119,378,530
Amended Programming Totals		\$ -	\$ 19,030,430	\$ 24,854,000	\$ 1,119,098	\$ 113,088,072	\$ 695,000	\$ 158,786,600
Total Estimated Project Cost								\$ 158,786,600
Total Cost in Year of Expenditure:								\$ 158,786,600

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:	\$ -	\$ 852,930	\$ (286,343)	\$ -	\$ 39,841,444	\$ (999,961)	\$ 39,408,070
Phase Change Percent:	0.0%	4.7%	-1.1%	0.0%	54.4%	-59.0%	33.0%
Amended Phase Matching Funds:	\$ -	\$ 1,930,650	\$ -	\$ 114,931	\$ 7,917,231	\$ 14,082	\$ 9,976,894
Amended Phase Matching Percent:	N/A	10.27%	0.00%	10.27%	7.76%	10.27%	7.80%

Note: The Amended Phase Matching percent only represents the match against the federal funds and does not include overmatching funds.

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ 16,868,280	\$ -	\$ 1,004,167	\$ 94,173,627	\$ 123,032	\$ 112,169,106
State	\$ -	\$ 1,930,650	\$ 24,854,000	\$ 114,931	\$ 13,359,345	\$ 571,968	\$ 40,830,894
Local	\$ -	\$ 231,500	\$ -	\$ -	\$ 5,555,100	\$ -	\$ 5,786,600
Total	\$ -	\$ 19,030,430	\$ 24,854,000	\$ 1,119,098	\$ 113,088,072	\$ 695,000	\$ 158,786,600

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	88.6%	0.0%	0.0%	83.3%	17.7%	70.6%
State	0.0%	10.1%	100.0%	0.0%	11.8%	82.3%	25.7%
Local	0.0%	1.2%	0.0%	0.0%	4.9%	0.0%	3.6%
Total	0.0%	100.0%	100.0%	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%	10.6%	0.0%	0.6%	59.3%	0.1%	70.6%
State	0.0%	1.2%	15.7%	0.1%	8.4%	0.4%	25.7%
Local	0.0%	0.1%	0.0%	0.0%	3.5%	0.0%	3.6%
Total	0.0%	12.0%	15.7%	0.7%	71.2%	0.4%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ 19,030,430	\$ 24,854,000	\$ 1,119,098	\$ -	\$ 695,000	Aid ID
Federal Funds Obligated:		\$ 16,868,280	\$ -	\$ 1,004,167	\$ -	\$ 123,032	S026(130)
EA Number:		PE002980	R9549000	U0000201		C0261067	FHWA or FTA
Initial Obligation Date:		7/26/2018	7/2/2020	5/22/2023		5/31/2022	FHWA
EA End Date:		N/A	N/A	N/A		N/A	FMIS or TRAMS
Known Expenditures:		N/A	N/A	N/A		N/A	FMIS
						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	

Fiscal Constraint Consistency Review	
1. What is the source of funding? Multiple federal, state, and local committed funds.	
2. Does the amendment include changes or updates to the project funding? Yes, the project TPC increases by 33%.	
3. Was proof-of-funding documentation provided to verify the funding change? Yes via STIP Summary Report and OTC action to occur in August.	
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? OTC approval is 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
	Yes	US26	5.97	9.96	3.99
Cross Streets	Route or Arterial	Cross Street	Cross Street		
	US26/Powell Blvd	99th Ave	East City Limits (at Gresham)		

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2018	Years Active	7	Project Status	5	(RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation	
Total Prior Amendments	10	Last Amendment	Administrative	Date of Last Amendment	September 2023	Last MTIP Amend Num	AM23-26-SEP1
Last Amendment Action	The admin mod slips the construction phase to FFY 2024.						

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes Equity Areas POC = Yes LEP = Yes LI = Yes
				X	X	X	X	

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	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?	No. The project has completed an air quality conformity analysis and transportation modeling analysis as part of the 2023 RTP Update
Exemption Reference:	Other - Planning and Technical Studies
Was an air analysis required as part of RTP inclusion?	Yes
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	Yes
RTP Constrained Project ID and Name:	ID# 11742 - Powell, SE (I-205 to 174th) Multi-Modal Improvements, Phase 2
RTP Project Description:	Widen Street to 3-4 lanes (inclusive of center turn lane) with sidewalks, buffered bike lanes or other enhanced bike facility, and enhanced pedestrian/bicycle crossings. Phase 2 includes all segments except phase 1 (RTP # 11648): 116th to 136th.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	Major Arterial
Yes	Transit	Hight Capacity Transit (HCT) corridor
Yes	Freight	Roadway Connector
Yes	Bicycle	Bicycle Parkway
Yes	Pedestrian	Pedestrian Parkway

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	US26/Powell Blvd	MAP-21 Principal Arterial
Functional Classification	Yes	US26/Powell Blvd	Urban Other Principal Arterial
Federal Aid Eligible Facility	Yes	US26/Powell Blvd	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? **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 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.
 - Goal #2 - Safe System:**
Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.
 - Goal 3 - Equitable Transportation:**
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 July 2, 2024 to July 30, 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? **Comments are 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
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-HB2017	Advance Construction with the anticipation that the final conversion code could be HB2017. In this case, the commitment of another type of federal funds is also still possible. This is why the Advance Construction funds are programmed as federal funds.
ACS-HB2017	Advance construction funds which are expected to convert to state HB2017. In this case, the funds are programmed then as state funds.
ADVCON (no designation)	Advance construction funds without a conversion fund code designation. This is generic advance Construction with the expected conversion code not yet finalized for the project.
HB2017	State funds that originate from HB2017 which are formally committed to the project. HB2017 made a significant investment in transportation to help further the things Oregonians value, such as a vibrant economy with good jobs, choices in transportation, a healthy environment, and safe communities
Other	General local or state funds committed to the project above the minimum match requirement. Also referred to as "overmatching" funds.
NHPP	A federal funding source (FHWA based) appropriated to the State DOT. The purposes of this program are: to provide support for the condition and performance of the National Highway System (NHS); to provide support for the construction of new facilities on the NHS; 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; and [NEW] to provide support for activities to increase the resiliency of the NHS to mitigate the cost of damages from sea level rise, extreme weather events, flooding, wildfires, or other natural disasters. [§ 11105(1); 23 U.S.C. 119(b)]
State	General state funds use to cover the required minimum match requirement to the federal funds in a specific phase
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.

Key Number: **21178**

2024-2027 STIP

Project Name: **US26 (Powell Blvd): SE 99th Ave - East City Limits**

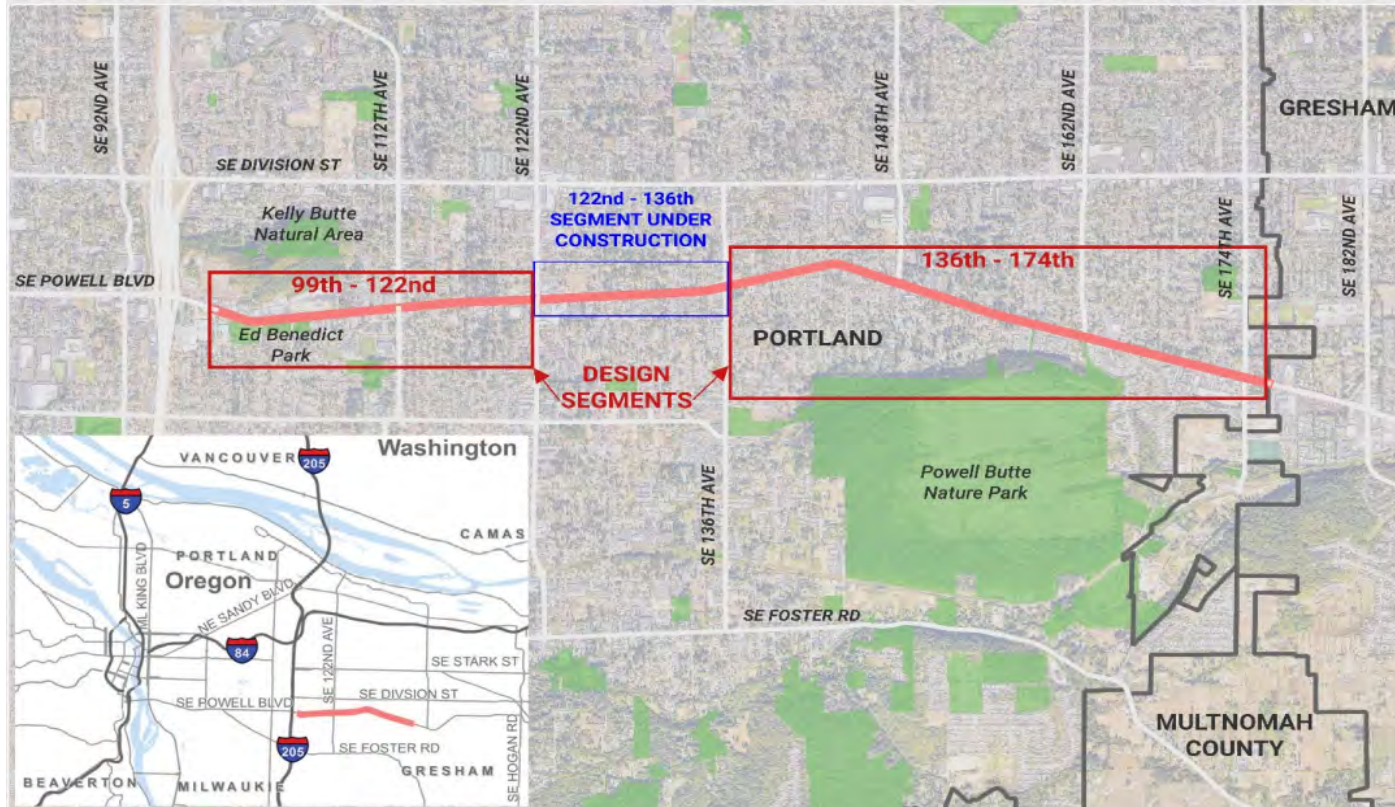
(DRAFT AMENDMENT)

Fund Codes											
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount	
PE	ACPO	ADVANCE CONSTRUCT PR	90.37%	17,198,930.00	89.73%	15,432,599.89	10.27%	1,766,330.11	0.00%	0.00	
	OTH0	OTHER THAN STATE OR	1.22%	231,500.00	0.00%	0.00	0.00%	0.00	100.00%	231,500.00	
	Y001	National Highway Perf IJJA	8.41%	1,600,000.00	89.73%	1,435,680.00	10.27%	164,320.00	0.00%	0.00	
	PE Totals			100.00%	19,030,430.00		16,868,279.89		1,930,650.11		231,500.00
RW	ACPO	ADVANCE CONSTRUCT PR	96.72%	24,040,000.00	0.00%	0.00	100.00%	24,040,000.00	0.00%	0.00	
	S070	HB2017 Funding Package	3.28%	814,000.00	0.00%	0.00	100.00%	814,000.00	0.00%	0.00	
	Y240	Surface Transportation Block Grant (STBG) - Flex IJJA	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	
	RW Totals			100.00%	24,854,000.00		0.00		24,854,000.00		0.00
UR	ACPO	ADVANCE CONSTRUCT PR	100.00%	1,119,098.00	89.73%	1,004,166.64	10.27%	114,931.36	0.00%	0.00	
	UR Totals			100.00%	1,119,098.00		1,004,166.64		114,931.36		0.00
CN	ACPO	ADVANCE CONSTRUCT PR	78.55%	88,827,972.00	0.00%	82,272,839.28	0.00%	6,555,132.72	0.00%	0.00	
	OTH0	OTHER THAN STATE OR	4.91%	5,555,100.00	0.00%	0.00	0.00%	0.00	100.00%	5,555,100.00	
	S070	HB2017 Funding Package	4.81%	5,442,113.63	0.00%	0.00	100.00%	5,442,113.63	0.00%	0.00	
	Y240	Surface Transportation Block Grant (STBG) - Flex IJJA	11.73%	13,262,886.37	89.73%	11,900,787.94	10.27%	1,362,098.43	0.00%	0.00	
	CN Totals			100.00%	113,088,072.00		94,173,627.22		13,359,344.78		5,555,100.00
OT	S070	HB2017 Funding Package	80.27%	557,886.37	0.00%	0.00	100.00%	557,886.37	0.00%	0.00	
OT	Y001	National Highway Perf IJJA	19.73%	137,113.63	89.73%	123,032.06	10.27%	14,081.57	0.00%	0.00	
	OT Totals			100.00%	695,000.00		123,032.06		571,967.94		0.00
Grand Totals					158,786,600.00		112,169,105.81		40,830,894.19		5,786,600.00

26 (Powell Blvd): SE 99th Ave – East City Limits

MP 5.81 – MP 9.96

Phase 2: SE 99th to SE 122nd and SE 136th to SE 174th





Memo

Date: July 15, 2024
To: Metro Council and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: July #1 FFY 2024 MTIP Formal Amendment & Resolution 24-5426 Approval Request – JL24-10-JUL1

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

FOR THE PURPOSE ADDING, CANCELING, OR AMENDING A TOTAL OF SEVEN PROJECTS TO MEET FEDERAL TRANSPORTATION PROJECT DELIVERY REQUIREMENTS

BACKGROUND

What This Is - Amendment Summary:

The July #1 2024 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment is the first of two submitted July 2024 formal amendment bundles. This formal amendment is considered the “regular” monthly MTIP formal amendment. The July #1 Formal Amendment bundle has been separated from the Rose Quarter Improvement Project Formal Amendment bundle in amendment number JL24-11-JUL2 (or the July #2 Rose Quarter formal amendment).

The two July 2024 formal amendment bundles mark the end of MTIP formal amendment submissions for FFY 2024. MTIP and STIP management efforts will now turn to maximizing FFY 2024 phase obligations to ensure both ODOT and Metro meet our minimum obligation targets. The end of the federal year close-out process begins. ODOT and Metro will complete a full review of all projects to confirm they will obligate their phase funding before the end of FFY 2024 or need to be slipped to FFY 2025. Project phase slip actions will occur administratively under FHWA and FTA’s oversight. Regular MTIP and STIP formal/full amendments will return in October with the start of FFY 2025.

Adding to the end-of-year close-out review process is ODOT’s current STIP rebalancing effort to resolve a significant state funding shortfall. The review actions began last May to first identify projects that can be delayed and slipped to FFY 2025 or later. The next step involves a triage action to leverage and maximize the use of existing funds. This involves determining projects will be canceled from the current STIP and reprogram their funds to other projects to ensure they can move forward. The July #1 2024 Regular Formal MTIP Amendment bundle contains a few results of the rebalancing projects. The impacts and required amendments to the MTIP and STIP will continue for several months.

TPAC July 12, 2024 Meeting Summary Notes:

TPAC met on July 12, 2024. Ken Lobeck, Metro staff provided TPAC members with their amendment notification and overview of the included projects in the July #1 2024 MTIP Formal Amendment bundle. A question arose from a TPAC member about the intended locations for new ODOT Portland Metro and Surrounding Areas Signing project in Key 23671. Ken explained that as far as he understood that specific project locations had not yet been determined. The project was being added to the MTIP as a region-wide project grouping bucket (PGB) with specific locations for the safety warning signs to be evaluated. He added that the funding was being shifted from another PGB to formalize the funding commitment to the Region 1 warning signs. ODOT will now move forward to identify, evaluate, rank, and list the final site locations.

Since several of the project changes have emerged as a result from the ODOT STIP Rebalancing Review, a few questions arose about the impacts the STIP Rebalancing could have on other ODOT funded projects. Ken Asked TPAC members that if they specific project questions to please contact ODOT directly as for the reasons for the phase delay, fund swaps, or project cancelations in the STIP. He added may of the future changes would be accomplished administratively with a summary included as part of the monthly amendments report to TPAC. With no further questions or discussion, TPAC provided their approval recommendation to JPACT to approve Resolution 24-5426

JPACT July 18, 202 Meeting Summary Notes:

JPACT is scheduled to met on Thursday, July 18, 2024. The July #1 2024 MTIP Formal Amendment will be included on the Consent Calendar. The bundle contains the regular type of needed project changes to meet federal delivery requirements (e.g., cost increases, phase slips, scope updates, adding new projects, etc.). Due to the routine nature of the amendment contents, JPACT approval is expected with little or no discussion. If a project id pulled for at JPACT, a summary will be provided to Metro Council for their review.

July #1 2024 MTIP Formal Amendment Project Contents Summary:

- **Key 23410 - I-84: NE Martin Luther King Jr Blvd - I-205 (ODOT):**
As part the STIP rebalancing actions to address an existing ODOT funding shortfall, Key 23419 is being canceled. The project current contains only the Preliminary Engineering phase programmed and is intended to design for pavement resurfacing to repair ruts and surface wear.
- **New Project Key 23676 - Metro Transportation Options FFY25 - FFY27 (Metro):**
Metro receives a regular three-year federal funding allocation from ODOT supporting the Regional Travel Options (RTO) program. The funding supplements the existing RTO program funding approved in the Metro Unified Planning Work Program (UPWP). The RTO program creates safe, vibrant, and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use. Metro and ODOT will now coordinate the priorities for the use of the allocated funds.

- **New Project Key 23671 - Portland Metro & Surrounding Areas Signing (ODOT):**
The formal amendment adds the new safety project to the MTIP which will provide various signing upgrades on Region 1 corridors for safety and maintenance improvements. Specific locations are to be determined. This is a regional project grouping bucket (PGB) being added to the MTIP. The \$366,837 committed to the project is being transferred from Key 22613. Key 22613 is non-MPO PGB. No action in the MTIP is required for key 22613.
- **New Project Key 23658 - Tualatin River Water Trail Access Enhancements (Tualatin Riverkeepers):**
The project was awarded Recreational Trail Program (RTP) funds from the Oregon Parks and Recreation Department and will provide various access improvements to the Tualatin Water Trail. Because the project upgrades are located on the Metro Bicycle and Pedestrian networks, the project becomes regionally significant for performance measures tracking which requires MTIP programming.
- **Project Key 22613 - Portland Metro and Surrounding Areas Safety Reserve (ODOT):**
The formal amendment combines the project funds into Key 23671 as noted above enabling Key 23671 to be added to the MTIP with full required funding.
- **Project Key 22431 - OR141/OR217 Curb Ramps (ODOT):**
The MTIP formal amendment corrects a programming discrepancy between the MTIP and STIP (corrects and updates the per phase obligations) and adds funding to the construction phase to address a funding shortfall.
- **Project Key 21178 - US26 (Powell Blvd): SE 99th Ave - East City Limits (ODOT):**
The formal amendment updates the funding levels in PE and ROW, plus adds new funds to support the construction phase.

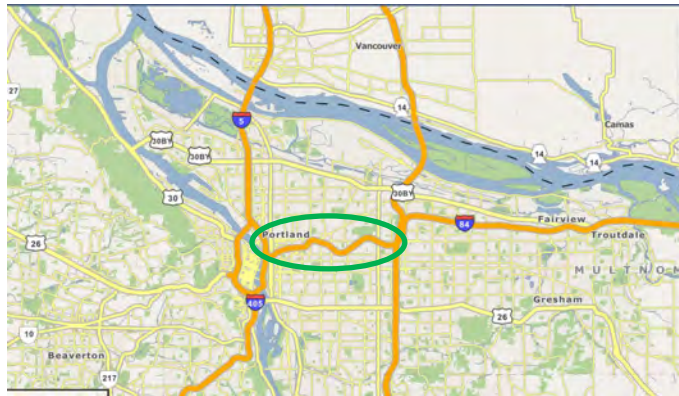
Added note: Per ODOT 's request, Key 21709, OR120: Columbia Slough Bridge (ODOT), has been pulled and removed from the July #1 MTIP Formal Amendment Bundle. The construction phase will not be added to the project at this time. This reduces the July #1 regular MTIP Formal Amendment Bundle under Resolution 24-5426 from eight to seven projects.

What is the requested action?

JPACT approved resolution 24-5426 and now recommends Metro Council provide the final approval enabling all required MTIP programming actions to be completed for the July #1 MTIP Formal Amendment.

A summary of the individual projects follows:

- **Key 23410 - I-84: NE Martin Luther King Jr Blvd - I-205 (ODOT):**
 - Lead Agency: ODOT.
 - Description: Design for pavement resurfacing to repair ruts and surface wear
 - Funding Summary: The project is currently programmed in FFY 2025 and funded with \$1,725,436 of federal National Highway Performance Program (NHPP) plus match for a total of \$1,871,000 in the Preliminary Engineering (PE) phase.
 - Action: The formal amendment cancels the PE phase and consequently the project from the MTIP and STIP. The action is part of the ODOT STIP rebalancing action. The funds will be re-allocated to other projects across the state.



- **New Project Key 23676 - Metro Transportation Options FFY25 - FFY27 (Metro):**
 - Lead Agency: Metro
 - Description: ODOT provides Metro with a three-year suballocation in support of the Regional Travel Options (RTO) program that supports the creation of safe, vibrant, and livable communities by providing grants and supporting efforts that increase walking, biking, ride sharing, telecommuting and public transit use. Since Metro has an existing and well-defined program, ODOT provides the suballocation to Metro to complete RTO activities throughout the Metro Metropolitan Planning Area (MPA) boundary. ODOT and Metro coordinate together the specific activities for the RTO program to complete.
 - Funding Summary: The ODOT allocation provides Metro with \$1,312,637 of federal Surface Transportation Block Grant (STBG) and match of \$150,238 for a project total of \$1,462,875.

Three ODOT non-MPO project grouping buckets will commit funding to the Metro RTO allocation as shown below. Added note: The ODOT contribution originates from PGBs outside of the Metro region. ODOT will complete the required adjustments to Keys 21347, 23048, and 23397 in the STIP. No action in the MTIP is required as the three PGBs do not exist in the Metro MTIP.

Source of Funding for Key 23676	State STBG	State Match
\$461,190 from Key 23147	\$413,826	\$47,364
\$ 438,455 from Key 23048	\$393,425	\$45,030
\$563,230 from Key 23397	\$505,386	\$57,844
\$1,462,875 total	\$1,312,637	\$150,238

- Action: The formal amendment adds the new travel options allocation in Key 23676 to the MTIP in FFY 2025. The funding supplements existing approved Metro RTO funding from the Unified Planning Work Program (UPWP) in Key 23215. The new funding also will proceed through the FHWA Financial Management Information System (FMIS) to be obligated and expended.
- **New Project Key 23671 Portland Metro & Surrounding Areas Signing (ODOT):**
 - Lead Agency: ODOT.
 - Description: Implement various signing upgrades in Region 1 corridors for safety and maintenance improvements. Locations to be determined as needed based on investigations. This will allow for quicker response to safety concerns.
Added Note: This is a region-wide project grouping Bucket (PGB) being added to the MTIP. Specific project locations have not yet been identified.
 - Funding Summary: The project is being programmed with \$366,837 if state HB2017 funds. The funds are being transferred from Key 22613 (Also part of this amendment bundle. See next project)
 - Action: The formal amendment adds the region-wide PGB to the MTIP.
- **Key 22613 - Portland Metro and Surrounding Areas Safety Reserve (ODOT):**
 - Lead Agency: ODOT
 - Description: A region-wide project grouping bucket (PGB) that makes funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah, and Washington counties.

- **Funding Summary:** The project is currently has \$366,837 of ODOT committed funds that will be transferred to Key 23671 as noted above.
- **Action:** The formal amendment transfers the funds to Key 23671 which essentially cancels project Key 22613.

2024-2027 Active STIP		CLACKAMAS		2024-2027 Active STIP			
Name: Portland Metro and surrounding areas safety reserve			Key: 22613				
Description: Funds available for projects to respond to urgent safety concerns throughout the ODOT Region 1 area located in Clackamas, Hood River, Multnomah and Washington counties.					Region: 1		
MPO: Non-MPO		Work Type: SAFETY					
Applicant: ODOT		Status: BUCKET OF FUNDS					
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	CLACKAMAS		
				REGION 1 ACT	HOOD RIVER		
				REGION 1 ACT	MULTNOMAH		
				REGION 1 ACT	WASHINGTON		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year:	2024						
Total					\$366,837.85		\$366,837.85
Fund 1				ACPO	\$330,154.06		
Match					\$36,683.79		
Footnote:							
Most Recent Approved Amendment			Approval Date: 10/31/2023				
Amendment No: 24-27-0392							

- **New Project Key 23658 - Tualatin River Water Trail Access Enhancements (Tualatin Riverkeepers):**

- **Lead Agency:** Tualatin Riverkeepers
- **Description:** Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.
- **Funding Summary:** The project was awarded a small Recreational Trails Program (RTP) grant of \$33,660. Along with the required local match, the total project cost estimate is \$61,660.
- **Action:** The formal amendment adds the new project to the MTIP.
- **Added Note:** RTP funded projects often are awarded to recreational type trail improvements. As such, there usually are not considered regionally significant or are located on the Metro Pedestrian and Bicycle networks. The location of this project is on the Metro Pedestrian and Bicycle networks. The project is now required to be included in the MTIP in support of Metro’s performance measures.



2023 Recreational Trails Program (RTP) Grants				
Project Name	Project Sponsor	Project Description	Total Project Cost	Grant Request Amount
Tualatin River Water Trail Access Enhancements	Tualatin Riverkeepers	Access improvements to the Tualatin Water Trail including updated map and river information, signage, personal flotation device (PFD) kiosks, and a boat storage shelter.	\$61,660	\$33,660

- **Key 22431 - OR141/OR217 Curb Ramps (ODOT):**

- Lead Agency: ODOT.
- Description: At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps impacting up to 115 site locations.
- Funding Summary: The project currently is programmed with multiple federal funds for a federal total of \$6,746,150. With match the total existing programming is \$7,518,278. The formal amendment adds State managed Surface Transportation Block Grant (STBG) and Advance Construction funding to the project’s PE and Construction phases. This increases the federal contribution to \$9,416,265. Along the required match to the project, the revised project total is \$10,494,000. The increase represents a 39% increase which is above the 20% administrative threshold for cost change.
- Action: The formal amendment adds the STBG and AC funds to PE and construction. The funding shortfall in the construction phase is resolved through the amendment allowing the construction phase to obligate during FFY 2025.



OR 141 (SW Hall Boulevard) and SW 72nd Avenue
Curb Ramps Project
 Fall 2023

Overview

We are bringing sidewalk curb ramps into compliance with Americans with Disabilities Act (ADA) accessibility standards on highways throughout Oregon including OR 141 (SW Hall Boulevard) and 72nd Avenue. These upgrades create safer and more accessible highway connections for all sidewalk users.

We will upgrade over 120 sidewalk curb ramps at approximately 90 intersections in Tigard along SW Hall Boulevard between Oregon 99W and Durham Road, and on SW 72nd Avenue between Gonzaga Street and Varns Street, making them ADA compliant. Work includes:

Upgrading existing ADA curb ramps

- This improvement will allow all users, including people in wheelchairs and using mobility aids, to make a smooth transition from the street to the sidewalk.

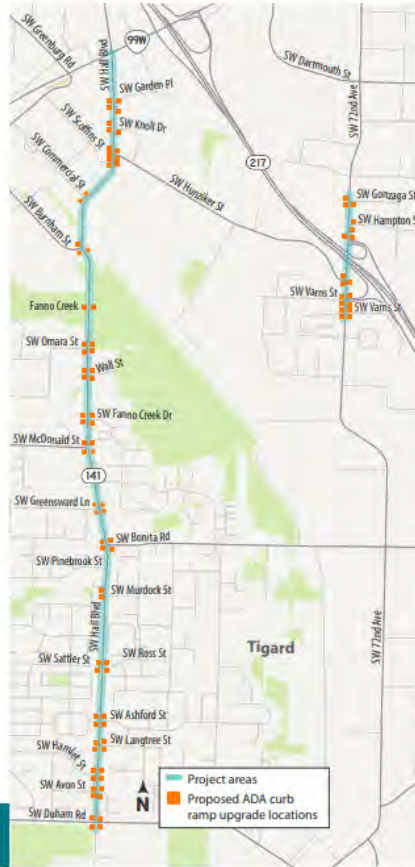
Lowering crosswalk buttons and installing audible pedestrian signals

- These upgrades help all pedestrians cross the street safely by accessing the crosswalk button at signalized intersections and providing an audible cue for the crosswalk signal.

Restriping and realigning crosswalks

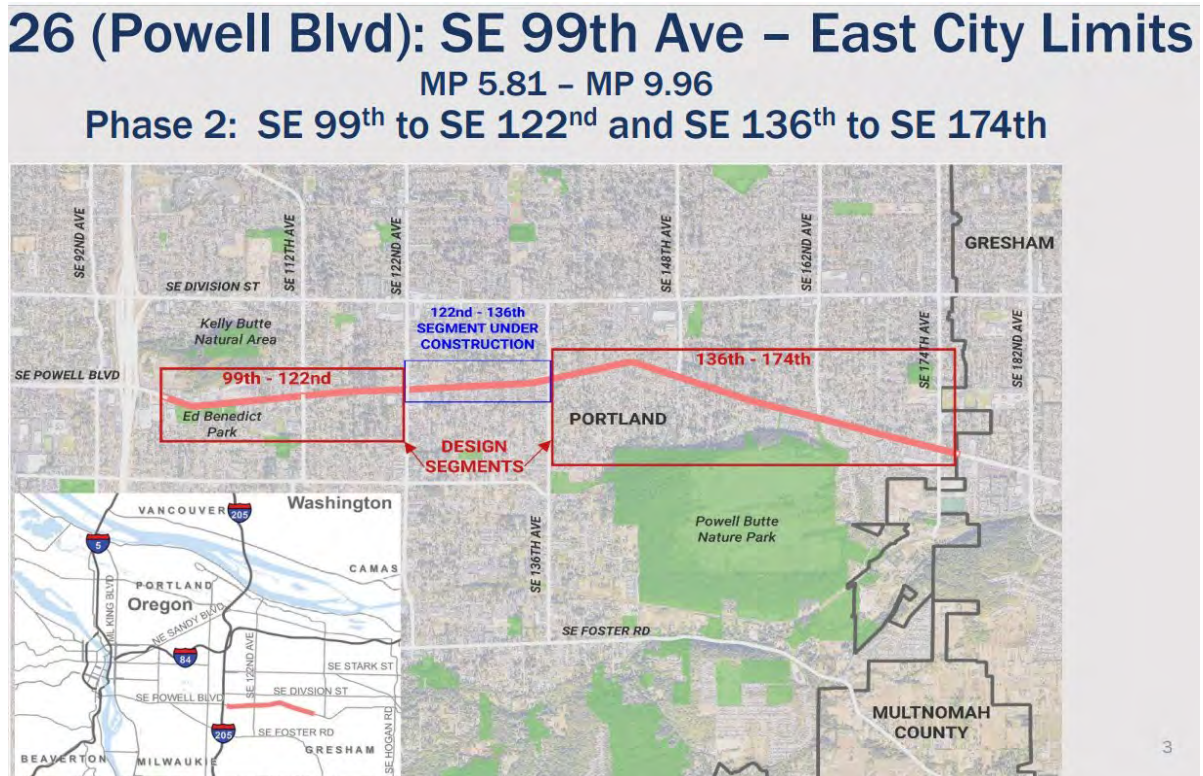
- These upgrades will improve visibility and create a direct path from curb-to-curb, increasing pedestrian safety while crossing the street.

The project is currently in design and is scheduled to start construction in 2025.



- **Key 21178 - US26 (Powell Blvd): SE 99th Ave - East City Limits (ODOT):**
 - **Lead Agency:** ODOT.
 - **Description:** On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings.
 - **Funding Summary:** The project contains multiple federal and state funds for an existing project total of \$119,378,530. The construction phase currently is programmed with a total of \$73,246,248. The latest cost estimate for the construction totals \$113,088,072. The construction phase requires added funding totaling \$39,841,824. Along with addressing the construction phase funding shortfall, funding updates are required to the PE, ROW, and Other phase to the project. The updates result in a revised total project cost of \$158,786,600. The cost increase represents a 33% increase to the project which is above the 20% threshold for administrative cost changes to projects.

- Action: The formal amendment updates the PE, ROW construction, and other phase with the required additional funds. This will enable the construction to move forward to obligate and be implemented in FFY 2025.
- Added Note: See Attachment 1, draft OTC Staff Report, for additional details.



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:

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the July #1 FFY 2024 Formal MTIP amendment (JL24-10-JUL1) will include the following actions:

- Are eligible and required to be programmed in the MTIP.
- Properly demonstrate fiscal constraint.

- 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 included in transportation demand modeling for performance analysis.
- 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.

<u>Action</u>	<u>Target Date</u>
• Initiate the required public notification/comment process.....	July 2, 2024
• TPAC agenda mail-out.....	July 5, 2024
• TPAC approval recommendation to JPACT.....	July 12, 2024
• JPACT approval and recommendation to Council.....	July 18, 2024
• Completion of public notification/comment process.....	July 30, 2024
• Metro Council approval.....	August 1, 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.....	August 6 ,2024
• USDOT clarification and final amendment approval.....	Late August 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 23-5335 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 new projects to be added into the MTIP and STIP. Follow-on fund obligation and expenditure actions can then occur to meet required federal delivery requirements.
4. **Metro Budget Impacts:** There is one direct impact to the Metro budget. The Travel Options allocation from ODOT in Key 23676 - Metro Transportation Options FFY25 - FFY27 provides supplemental funding to the Metro RTO program. This appears to require a minor budget adjustment to the SFY 2025 UPWP. Other than Key 23676, the remaining projects and their funding adjustments do not have an impact to the Metro budget. The identified funding for these projects does not originate from Metro.

RECOMMENDED ACTION:

JPACT approved resolution 24-5426 and now recommends Metro Council provide the final approval enabling all required MTIP programming actions to be completed for the July #1 MTIP Formal Amendment.

One attachment: Key 21178 – US26 Powell Cost Increase Draft OTC Staff Report



DATE: August 1, 2024

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda X** – Amend the 2024-2027 Statewide Transportation Improvement Program (STIP) to increase funding for *US26 (Powell Blvd): SE 99th Ave - East City Limits* project.

Requested Action:

Approve amending the 2024-2027 Statewide Transportation Improvement Program (STIP) to increase the project funding for the *US26 (Powell Blvd): SE 99th Ave - East City Limits* project (K21178) from \$119,231,500 to \$158,786,600, for a total increase of \$39,555,100.

Project to increase funding:

US26 (Powell Blvd): SE 99th Ave - East City Limits (K21178)			
PHASE	YEAR	Current	Proposed
Preliminary Engineering	2018	\$19,030,430	\$19,030,430
Right of Way	2020	\$25,140,344	\$24,854,000
Utility Relocation	2023	\$1,119,098	\$1,119,098
Construction	2025	\$73,246,628	\$113,088,072
Other	2022	\$695,000	\$695,000
TOTALS		\$119,231,500	\$158,786,600

The additional \$39,841,444 of funding in the Construction Phase is coming from:

Fund/Description	Amount
FFY24 Redistribution Funding	\$25,000,000
ADA GARVEE Bond funds	\$8,000,000
City of Portland – Portland Water Bureau - city's share of the waterline work	\$5,000,000
City of Portland – Bureau of Environmental Services (IGA for \$450,000 and CIA for \$61,500)	\$511,500
Utility add-work agreements (Lumen, NW Natural, and Ziplly)	\$43,600
Funds previously de-obligated from Other phase	\$1,000,000
Unneeded funds from the Right of Way phase	\$286,344
TOTAL	\$39,841,444

Background

The purpose of the *US26 (Powell Blvd): SE 99th Ave - East City Limits* project (K21178) is to make safety improvements to US26 (SE Powell Blvd) that include sidewalks, buffered bike lanes, enhanced pedestrian crossings, and a center turn lane. In 2007, ODOT began collaborating with the residents of East Portland and the city of Portland on how to turn Powell Boulevard into a safe and high-quality corridor to better serve the community with a specific focus on improving conditions for people walking, biking and accessing public transportation. The Oregon legislature provided funding, through House Bill 2017, for ODOT to design and construct the project on SE Powell Blvd from SE 99th Avenue to the east city limits (just past SE 174th). Upon completion of construction, the corridor will be jurisdictionally transferred to the city of Portland.

Throughout the design phase, the design team utilized several tools to continually manage the project costs and find opportunities for cost reductions and project efficiencies including:

- **A Value Engineering (VE) Study** at the Design Acceptance Package (Dec 2020) – This study found cost reductions in stormwater design, set expectations for close coordination with utilities and work zones to minimize risks, and established the need for early procurement packages to reduce schedule risks.
- **Constructability Workshop with the Association of General Contractors (AGC)** (Jan 2022) between Advance and Final plans – Contractors provided valuable information that the team used to assess an alternative traffic control strategy, as well as unit cost info that led to a refined cost estimate.
- **Cost Risk Analysis (CRA)** at the Advance and Final plans stage (May and Aug 2022) – The CRA evaluated and confirmed appropriate market conditions, unit prices, and contingencies; and addressed strategies to mitigate top project risks.
- **Variability analysis for unit costs and quantities** (each project milestone) – This cost estimating tool further refined estimate certainty range.
- **Project Risk Register** (ongoing) – This project management tool continually identified and assessed project risks and determined the best risk response strategies to mitigate cost and schedule impacts.
- **Project Financial Plan** (ongoing) established during design in collaboration with Division leadership, the Finance Office and Statewide Project Delivery Branch to identify costs risks and develop long term funding strategies to deliver the project through construction completion.

Even with these measures in place, some cost elements grew beyond what the project team could control and estimated project costs expanded past the available funding. ODOT now seeks to add \$39.8 million to the CN phase to ensure that when the project is bid, there are adequate funds to support the project for the full five-year construction duration. To do so, ODOT is seeking to add \$39.8 million to the construction phase via:

- \$5.5 million from the city of Portland to cover agreed upon improvements on their behalf.
- \$8 million in ADA funding for replacement of over 240 ADA settlement ramps.
- \$25 million from the FFY 2024 Redistribution process to cover the following:

- \$15 million: Increased effort to administer a 5-year construction contract. This project originally anticipated a Construction Engineering (CE) budget of 20% of the biddable items. Since the project cost was originally estimated, the biddable item costs and the percentage guidance for CE budgets have both increased. For a project of this complexity (urban arterial, multiple partner agencies, five-year construction duration) the recommended CE percentage is now 30% to 40%. The increased CE estimate is based on lessons learned from recent long-term projects such as OR217 and Abernethy Bridge, and guidance from the statewide construction office.
- \$10 million: Additional funding to cover design, right of way and material costs due to two-year delay associated with resolving contracting methodology and approach. The delay required extensions of temporary ROW easements, additional consultant work to update project plans and specs with updated requirements, and additional ODOT work to review and coordinate additional final design and contracting submittals.
- \$1.3M for Portland Water Bureau and other utility relocation work.

Outcomes:

With approval of the increased project funding, ODOT will proceed to fund, award, and construct *US26 (Powell Blvd): SE 99th Ave - East City Limits* project as described above.

Without approval, ODOT will not move forward with constructing the entire project alignment in one contract. ODOT will direct the design team to revise the plan set to deliver a segment of the project alignment, from SE 136th to 174th, and to develop a second set of plans for SE 99th to SE 122nd for delivery at a future date, when funding is secured. ODOT will request a STIP amendment at your October 2024 meeting to add funding from the City of Portland and the ADA program and to revise the project limits.

This revised approach will result in the following impacts:

- Additional design costs to divide the project into multiple bid packages.
- Increased total construction cost due to inflation impacts on delayed work.
- Additional costs due to inefficiencies from splitting the project into multiple packages.
- Delayed completion of the city of Portland Water Bureau work on the west segment
- New or amended intergovernmental agreements with our project partners at the city of Portland to split the project, which could further delay both phases.
- Delay of safety improvements for all Outer Powell roadway users.
- Delay of the Jurisdictional Transfer to city of Portland.

Attachments:

- Attachment 1 – Vicinity and Location Maps

**Resolution No. 24-5424 For the Purpose of Adding Two
New Projects and Canceling One Existing Project from
the 2024-27 MTIP, and Amending the Previously
Obligated Rose Quarter Improvement Project, to Meet
Federal Transportation Project Delivery Requirements**
Public Hearing

Metro Council Meeting
Thursday, August 1st, 2024

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE 2024-27 MTIP TO REVISE THE ROSE QUARTER IMPROVEMENT PROJECT, CANCEL A PROJECT, AND ADD THREE NEW PROJECTS TO MEET FEDERAL TRANSPORTATION PROJECT DELIVERY REQUIREMENTS) RESOLUTION NO. 24-5424
)
) Introduced by: Chief Operating
) Officer Marissa Madrigal in
) 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. 23-5335 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 (USDOT) 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, as set forth in detail below, the MTIP will be amended to address 5 actions; specifically, to revise the Rose Quarter Improvement Project, cancel one existing project and add a new project with funds from the canceled project, and add two additional projects; and

WHEREAS, the Oregon Department of Transportation’s (ODOT) successful effort to secure a USDOT discretionary \$450 million Reconnecting Communities and Neighborhoods/Neighborhood Access and Equity (RCN/NAE) grant will be applied to the Rose Quarter Improvement Project; and

WHEREAS, the MTIP must be amended to add updates to the Preliminary Engineering and Right-of-Way phases to the Rose Quarter Improvement Project, funded with RCN/NAE grant funds, and also enable a Utility Relocation and specialized Other

phase to be added to the project to allow the project to move closer to implementing the construction phase; and

WHEREAS, the MTIP must be amended to cancel ODOT's I-5 Over NE Hassalo St and NE Holladay St structural overlay rehabilitation project and to add a stormwater facility upgrade requirements within the Rose Quarter project limits with \$5 million transferred from the canceled project; and

WHEREAS, the MTIP must be amended to create a separate construction phase segment, I-5 Rose Quarter - Broadway to Weidler Phase 1, to be implemented in support of the overall Rose Quarter Improvement Project and funded by RCN/NAE grant funds; and

WHEREAS, the MTIP must be amended to add multiple complete street upgrades, plus enhanced access to Rose Quarter Transit Center, funded by the City of Portland's RCN/NAE grant and included in this Resolution because of the connection to the Rose Quarter project; and

WHEREAS, the programming updates to the five projects are stated in Exhibit A in more detail to this resolution; and

WHEREAS, on July 12, 2024, Metro's Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution and on July 18, 2024, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to amend the 2024-27 MTIP to add 4 projects and cancel one project as stated in more detail in Exhibit A.

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

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Exhibit A
July #2 FFY 2024 Formal/Full MTIP Amendment Summary
Formal Amendment #: JL24-11-JUL2

The July #2 Federal Fiscal Year 2024 MTIP Formal Amendment is a special bundle of projects being amended or added to the 2024-27 MTIP in support of the Rose Quarter Improvement Project. Currently, the Rose Quarter Improvement Project is programmed in a single project in Key 19071. This project is being amended by adding phases and funds. The Rose Quarter Improvement project now proposes a phased/segmented delivery format.

Two new stand-alone “child” projects are being added to the MTIP with funds committed to the construction phase. One project that falls within the Rose Quarter projects is being canceled. The funds will be used to support the stormwater facilities child project. Finally, the new Portland Broadway Main Street Connections project that began the Metro MTIP amendment process with the June 2024 Formal Amendment bundle is being assimilated into the July 2024 Rose Quarter Improvement Project bundle due to its connection to the Rose Quarter upgrades.

As a result of these actions, the Rose Quarter Improvement Project bundle under formal amendment JL24-11-JUL2 contains a total of five projects. The associated funding changes primarily result from ODOT’s successful \$450 million grant award from the USDOT Reconnecting Communities and Neighborhoods Grant 2023 Program with the funds awarded from the Neighborhood Access and Equity (NAE) funding category (Fund type code used for reference is NAE23). The grant awarded NAE23 funds are 100% federal. There is no local match requirement. A summary of the five projects includes the following:

- **Key 19071 - I-5 Rose Quarter Improvement Project (ODOT):** The formal amendment adds \$30 million of NAE23 grant awarded funds to the PE phase, swaps out \$30 million of HB2017 funds for NAE23 funds, adds a Utility Relocation (UR) phase with \$7,500,000 of NAE23 funds, and adds small Other phase with \$250,000 of NAE23 funds. Construction phase activities are being added as separate stand-alone child projects. Construction is proposed to be completed through a “segmented”, “phased”, or “package” delivery approach. Two of the required construction phase child projects are being added through this formal amendment. They are identified below.
- **Key 21219 - I-5 Over NE Hassalo St and NE Holladay St (Portland) (ODOT):** The lead agency/applicant for the project is ODOT. The formal amendment cancels Key 21219 and transfers the \$5 million to support the new Stormwater Facilities child project in Key 23682.

- **[New Project Key 23682 - I-405 and I-5 Stormwater Facilities \(ODOT\)](#)**: This new child project supports the Rose Quarter Improvement Project and will construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. The \$5 million for this project is being transferred from the cancel project in Key 21219.
- **[New Project Key 23672 - I-5 Rose Quarter: Broadway to Weidler Phase 1 \(ODOT\)](#)**: This is the second construction phase child project to the main Rose Quarter Improvement project in Key 19071. The project funding originates from the new NAE23 grant and will Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler and supporting facilities plus complete compatibility construction for follow-on packages.

Note: For the new child construction phase projects, preliminary engineering is being completed through the PE phase in Key 19071.

- **[New Project Key 23646 - Broadway Main Street and Supporting Connections \(Portland\)](#)**: The project will complete multiple complete street upgrades enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services. The project funding originates from Portland's successful effort to also secure a \$38 million USDOT NAE23 grant. The project is a stand-alone and separate project to the Rose Quarter Improvement Project. The project began Metro processing steps with the June 2024 MTIP Formal amendment bundle and has received TPAC approval during their June 7, 2024 meeting. However, due to the project's connection to the Rose Quarter Improvement Project, it is being assimilated into the July # 2 MTIP Formal Amendment bundle along with the other Rose Quarter Improvement Projects for an improved processing coordination through JPACT and Metro Council.

The Exhibit A Tables that follow on the next pages contain the specific project changes for the fives in the July #2 Formal MTIP Amendment Bundle., See the Exhibit A/MTIP Worksheets for the detailed changes and consistency review areas. Additionally, the Portland Broadway Main Street and Supporting Connections project is being included for information and processing consistency purposes.

2024-2027 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 24-5424

July #2 Rose Quarter FFY 2024 Formal Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: JL24-11-JUL2

Total Number of Projects: 5

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Category: Amended Existing Projects in the 2024-27 MTIP				
(#1) ODOT Key # 19071 MTIP ID 70784	ODOT	Rose Quarter Improvement	On I-5 in Portland, complete multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities.	ADD PHASES AND FUNDING: The formal amendment adds \$30 million from the new USDOT RCN/NAE23 grant award to ODOT to PE swaps out NAE23 funds in the ROW phase and adds a Utility Relocation (UR) phase plus adds an Other phase to the project.
Category: Existing Projects Being Canceled in the 2024-27 MTIP				
(#2) ODOT Key # 21219 MTIP ID 71043	ODOT	I-5 Over NE Hassalo St and NE Holladay St (Portland)	On I-5 over NE Hassalo St and NE Holladay St (BR#08583), replace the current structural overlay (HB2017 Awarded Project, \$5 million Original Award)	CANCEL PROJECT: Cancel the project from the 2024-27 MTIP and shift the funds over to Key 23682
Category: Adding New Projects to the 2024-2027 MTIP				
(#3) ODOT Key # 23682 MTIP ID TBD <i>New Project</i>	ODOT	I-405 and I-5 Stormwater Facilities	Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.	ADD NEW PROJECT: Add new child project to the 2024-27 MTIP in support of the Rose Quarter Improvement Project in Key 19071. Funding is from canceled project Key 21219.

<p>(#4) ODOT Key # 23672 MTIP ID TBD <i>New Project</i></p>	<p>ODOT</p>	<p>I-5 Rose Quarter: Broadway to Weidler Phase 1</p>	<p>Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and supporting facilities and complete compatibility construction for follow-on packages</p>	<p><u>ADD NEW PROJECT:</u> The formal amendment adds the new Rose Quarter construction child project that will replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler. The \$382 million required funding is sourced from the new ODOT awarded NAE23 grant.</p>
<p>Category: Additional Projects Included with the Rose Quarter Improvement Project Bundle (previously approved by TPAC)</p>				
<p>(#5) ODOT Key # 23646 MTIP ID TBD <i>New Project</i></p>	<p>Portland</p>	<p>Broadway Main Street and Supporting Connections</p>	<p>Complete multiple complete street upgrades enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services.</p>	<p><u>ADD NEW PROJECT:</u> The formal amendment adds the new USDOT Neighborhood Access and Equity (NAE) Program/Reconnecting Communities Pilot (RCP) Program grant awarded project to the MTIP for Portland. Note: TPAC’s approval recommendation to JPACT previously occurred during their June 7, 2024 meeting. The project will process with the July 2024 #2 Rose Quarter Formal Amendment bundle through JPACT and Metro Council.</p>

Proposed Amendment Review and Approval Steps. This amendment bundle will progress through the Metro approval process via a compressed review and approval process during June and July as follows:

Date	Action
July #2 (JL24-11-JUL2) Rose Quarter Improvement Project Formal MTIP Amendment Required Approval Actions	
Wednesday, June 12, 2024	Post amendment & begin 30+ day notification/comment period.
Friday, July 12, 2024	July TPAC Meeting. Provide TPAC members will receive their official notification of the amendment bundle and be requested to provide an approval recommendation for the amendment resolution to JPACT
Friday, July 12, 2024	End the 30-day public comment period. Complete comments summary and provide to ODOT and JPACT for their review
Thursday, July 18,2024	July JPACT meeting. Project presentation anticipated for JPACT. JPACT will be requested to approvd the amendment resolution and provide an approval recommendation to Metro Council
Thursday, August 1, 2024	Metro Council meeting. Provide final Metro approval for the the Rose Quarter Improvement Project amendment bundle
Tuesday, August 6, 2024	Submit final Metro approved July #2 Rose Quarter Improvement project amendment bundle to ODOT and FHWA to complete final approval steps.
Late August, 2024	Final approval from FHWA estimated should occur.



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

MTIP Formal Amendment
ADD PHASES
 Update PE and add UR and Other phases

Project #1

I-5 Rose Quarter Improvement Project

Project Details Summary

ODOT Key #	19071	RFFA ID:	N/A	RTP ID:	10867 11176	RTP Approval Date:	11/30/2023
MTIP ID:	70784	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-11-JUL2		STIP Amendment ID:		24-27-1281	

Summary of Amendment Changes Occurring:

The formal amendment adds USDOT RCN/NAE discretionary grant awarded funding to the PE and ROW phase s and adds a UR and Other to the project. The summary of changes includes the following:

1. The project descriptions are updated in the MTIP and STIP based on the changes and the proposed phased/segmented construction phase upgrades.
2. Budget and programming changes:
 - Preliminary Engineering (PE Phase) phase updated:
 - Fund type code adjustments based on the current funding structure for phase are occurring.
 - The amendment adds \$30,000,000 of RCN/NAE23 federal funds to complete project design.
 - The PE phase increases from \$157,391,997 to \$187,391,997
 - Right of Way (ROW) phase updated:
 - Swaps a \$30 million of HB2017 funding (identified as Advance Construction funds).
 - Splits out the Advance Construction fund type codes to reflect a\$30 million will be from the RCN/NAE 2023 grant.
 - Corrects an MTIP overprogramming error for the phase.
 - The ROW phase remains unchanged at \$41,000,000.
 - Adds a new Utility Relocation (UR) phase to pay for reimbursable utility relocations \$7,500,000 as Advance Construction NAE23 funds,
 - Adds a new Other (OT) phase to purchase ITS signs & software \$250,000 as Advance Construction NAE23 funds.

The total programmed amount for the project increases in the MTIP from \$218,091,997 to \$236,141,997. The new programmed amount does not fully program the project. The estimated to project cost is \$1.7 billion. A phased/segmented delivery approach for the construction phase is proposed to add separate stand-alone child projects with the required construction phase funding.

Project Name:	I-5 Rose Quarter Improvement Project							
Lead Agency:	ODOT		Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No		Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes	

Short Description:
~~On I-5 between I-84 and I-405, Proposed multi-modal improvements include: ramp-to-ramp auxiliary lanes, highway shoulders, highway covers, new overcrossing, SB ramp relocation, new bike/ped crossing and bike/ped facilities.~~
On I-5 in Portland, complete multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities.

MTIP Detailed Description (Internal Metro use only):
~~On I-5 between I-84 and I-405, continue prior planning and project development efforts of the Broadway-Weidler Facility Plan and the N/NE Quadrant Plan, which identified transportation investments that would result in improved safety and operations and support economic growth. Proposed multi-modal improvements include: Ramp-to-Ramp (Auxiliary) Lanes, Highway Shoulders, Highway Covers, New Overcrossing, I-5 Southbound Ramp Relocation, New Bike and Ped Crossing, and improved Bike and Ped Facilities. (HB2017 Named & conditioned project to add \$16,265,452 of NHFP funds)~~
On and around I-5 from MP 301.40 to MP 303.20, complete multiple system upgrades to help reduce congestion, improve safety and traffic operations, and support economic growth in the Portland Metro region with multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will: provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and the N/NE Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort. (NAE23 grant award \$450 million).

STIP Description:
~~Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on the main north-south freeway on the west coast and redesigns the multimodal local street network. The project will smooth traffic flow on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.~~
The Rose Quarter investment will help reduce congestion, improve safety, and traffic operations, and support economic growth in the Portland Metro region with multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will: provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and then/NE Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	New Capacity - General Purpose	Capital Improvement
		Lane Modification or Reconfiguration	
		System Management and Operations	
	Highway - Bridge	New Capacity - General Purpose	
		Lane Modification or Reconfiguration	
	Highway - Bike	Protected Parallel Facility	
	Highway - Pedestrian	Protected Parallel Facility	
Highway - Other	Other Vehicle Operations		
ODOT Work Type:	MODERN		

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									
NHPP Exempt	M002 MOE2	2020 2016		\$ 3,805,500					\$ 3,805,500
AC-HB2017	ACPO	2016		\$ 82,998,000					\$ 82,998,000
AC-NAE23	ACPO	2016		\$ 30,000,000					\$ 30,000,000
NHPP	Z001	2016		\$ 1,844,400					\$ 1,844,400
NHFP	Z460	2016		\$ 15,000,000					\$ 15,000,000
ADVCON	ACPO	2020			\$ 55,977,540				\$ -
AC-HB2017	ACPO	2020			\$ 10,072,002				\$ 10,072,002
AC-NAE23	ACPO	2020			\$ 30,000,000				\$ 30,000,000
AC-NAE23	ACPO	2025				\$ 7,500,000			\$ 7,500,000
AC-NAE23	ACPO	2025						\$ 250,000	\$ 250,000
Federal Totals:			\$ -	\$ 133,647,900	\$ 40,072,002	\$ 7,500,000		\$ 250,000	\$ 181,469,902

Note: The AC-NAE23 fund type code represents an expected conversion code from the USDOT RCN/NAE 2023 discretionary award. The funds are 100% federal.

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (NHPP EX)	Match	2020 2016		\$ 321,045					\$ 321,045
ADVCON (state)	ACP0	2016		\$ 130,000,000					\$ -
State (ACHB2017)	Match	2016		\$ 7,002,000					\$ 7,002,000
State	S010	2016		\$ 1,000,000					\$ 1,000,000
State (Z001)	Match	2016		\$ 155,600					\$ 155,600
NHPP (State)	Y001	2016		\$ 40,000,000					\$ 40,000,000
State (Z460)	Match	2016		\$ 1,265,452					\$ 1,265,452
State (ACP0)	Match	2020			\$ 4,722,460				\$ -
State (HB2017)	Match	2020			\$ 927,998				
State Totals:			\$ -	\$ 49,744,097	\$ 927,998	\$ -	\$ -	\$ -	\$ 49,744,097

Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Other	OTH0	2016		\$ 4,000,000					\$ 4,000,000
									\$ -
Local Totals:			\$ -	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000

Phase Totals	Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:	\$ -	\$ 157,391,997	\$ 60,700,000	\$ -	\$ -	\$ -	\$ 218,091,997
Amended Programming Totals	\$ -	\$ 187,391,997	\$ 41,000,000	\$ 7,500,000	\$ -	\$ 250,000	\$ 236,141,997
Total Estimated Project Cost:							\$ 1,700,000,000
Total Cost in Year of Expenditure:							\$ 1,700,000,000

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	Yes	Construction phase segments will be programmed as separate child projects					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ 30,000,000	\$ (19,700,000)	\$ 7,500,000	\$ -	\$ 250,000	\$ 18,050,000
Phase Change Percent:	0.0%	19.1%	-32.5%	100.0%	0.0%	100.0%	8.3%
Amended Phase Matching Funds:	\$ -	\$ 8,744,097	\$ 927,998	\$ -	\$ -	\$ -	\$ 9,672,095
Amended Phase Matching Percent:	N/A	17.26%	8.44%	0.00%	N/A	0.00%	4.96%

Identified Funding Sources for Key 19071 (per the STIP Summary Report Financial Estimates Section)						
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes
ODOT Enhance	PE	\$ 1,500,000	\$ 126,545	\$ -	\$ 1,626,545	
ODOT Region 1 Fix-It Program	PE	\$ 1,844,400	\$ 155,600	\$ -	\$ 2,000,000	
ODOT Statewide Fix-it Program	PE	\$ -	\$ 1,000,000	\$ -	\$ 1,000,000	
HB2017 Discretionary	PE	\$ 119,886,000	\$ 10,114,000	\$ -	\$ 130,000,000	
Local contributions	PE	\$ -	\$ -	\$ 4,000,000	\$ 4,000,000	
ODOT Region 1	PE	\$ 2,305,500	\$ 194,500	\$ -	\$ 2,500,000	
SW Natl Hwy Freight (NHFP)	PE	\$ 15,000,000	\$ 1,265,452	\$ -	\$ 16,265,452	FHWA National Highway Freight Prg
USDOT Grants 2023	PE	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 170,535,900	\$ 12,856,097	\$ 4,000,000	\$ 187,391,997	
HB2017 Discretionary	ROW	\$ 10,072,002	\$ 927,998	\$ -	\$ 11,000,000	
USDOT Grants 2023	ROW	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	Assumed part of the NAE grant
Phase Totals:		\$ 40,072,002	\$ 927,998	\$ -	\$ 41,000,000	
USDOT Grants 2023	UR	\$ 7,500,000	\$ -	\$ -	\$ 7,500,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 7,500,000	\$ -	\$ -	\$ 7,500,000	
					\$ -	
USDOT Grants 2023	Other	\$ 250,000	\$ -	\$ -	\$ 250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 250,000	\$ -	\$ -	\$ 250,000	
Program Totals All Phases					Total	
ODOT Enhance					\$ 1,626,545	
ODOT Region 1 Fix-It Program					\$ 2,000,000	
ODOT Statewide Fix-it Program					\$ 1,000,000	
HB2017 Discretionary					\$ 141,000,000	
Local contributions					\$ 4,000,000	
ODOT Region 1					\$ 2,500,000	
SW Natl Hwy Freight (NHFP)					\$ 16,265,452	
USDOT Grants 2023					\$ 67,750,000	Total grant award = \$450 million
Total:					\$ 236,141,997	TPC estimate = \$1.7 Billion

Phase Programming Summary Totals							
Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ 133,647,900	\$ 40,072,002	\$ 7,500,000		\$ 250,000	\$ 181,469,902
State	\$ -	\$ 49,744,097	\$ 927,998	\$ -	\$ -	\$ -	\$ 50,672,095
Local	\$ -	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000
Total	\$ -	\$ 187,391,997	\$ 41,000,000	\$ 7,500,000	\$ -	\$ 250,000	\$ 236,141,997

Phase Composition Percentages							
Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	71.3%	97.7%	0.0%	0.0%	100.0%	76.8%
State	0.0%	26.5%	2.3%	0.0%	0.0%	0.0%	21.5%
Local	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	1.7%
Total	0.0%	100.0%	100.0%	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%	56.6%	17.0%	3.2%	0.0%	0.1%	76.8%
State	0.0%	21.1%	0.4%	0.0%	0.0%	0.0%	21.5%
Local	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	1.7%
Total	0.0%	79.4%	17.4%	3.2%	0.0%	0.1%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ 187,391,997	\$ 41,000,000				Aid ID
Federal Funds Obligated:		\$ 133,647,900	\$ 30,000,000				
EA Number:		PE002591	R9470000				FHWA or FTA
Initial Obligation Date:		9/21/2015	9/4/2020				FHWA
EA End Date:		N/A	N/A				FMIS or TRAMS
Known Expenditures:		N/A	N/A				FMIS
						Estimated Project Completion Date:	Unspecified
Completion Date Notes: Unspecified completion date per ODOT timeline on Rose Quarter website							
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? **Various federal, state, and local sources**
2. Does the amendment include changes or updates to the project funding? **Yes. A new \$450 million dollar grant USDOT grant is being added to the project**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, via the USDOT RCN/NAE award letter**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **Various approvals from ODOT to USDOT**
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	Interstate 5	301.40	303.20	1.80
Cross Streets	Route or Arterial		Cross Street		Cross Street
	Multiple		Included in the RTP		

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2016	Years Active	9	Project Status	5	(RW) Right-of Way activities initiated including R/W acquisition and/or utilities relocation	
Total Prior Amendments	6	Last Amendment	Administrative	Date of Last Amendment	February 2023	Last MTIP Amend Num	AM23-09-FEB1
Last Amendment Action	ADD FUNDS: Add OTC approved funds to prior obligated PE and ROW phases. Total project funding increases to \$218,091,997. No new phases are added to the project.						

Anticipated Required Performance Measurements Monitoring

Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes EFA Low Income applies
	X			X	X	X		

Added note: The above measures are preliminary for later tracking and analytics. Final performance measure determinations will be completed by Metro RTP, GIS, and Resource Development staff over the next two years and through multiple reviews. Additional performance measure attributes may emerge through these reviews and apply to the project.

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Yes. The project is capacity enhancing.
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	No. The project is not exempt per 40 CFR 93.126, Table 2, or 40 CFR 93.127, Table 3
Exemption Reference:	Not Applicable
Was an air analysis required as part of RTP inclusion?	Yes. The approved 2023 RTP has complete an air conformity and transportation modeling analysis of the Rose Quarter Improvement project based on the
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	Yes, as noted above.
RTP Constrained Project ID and Name:	RTP IDs: ID 10867: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (PE, NEPA, ROW) ID 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)
RTP Project Description:	<u>ID 10867:</u> Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter <u>ID 11176:</u> The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	Interstate 5 in the project limits is designated as a Throughway
Yes	Transit	Interstate 5 in the project limits is designated as a Frequent Bus
Yes	Freight	Interstate 5 in the project limits is designated as a Main Roadway Route
No	Bicycle	No designation
No	Pedestrian	No designation

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	I-5	Interstate
Functional Classification	Yes	Not Applicable	Urban Interstate
Federal Aid Eligible Facility	Yes	Not Applicable	1 = Interstate

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. 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 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: 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 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? Yes. The project is capacity enhancing and exceeds \$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 June 12, 2024 to July 12, 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? Comments are expected
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? A comment log will be established . Comments are 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 funds can also be used to support specific elements within the phase beyond the minimum match requirement
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-NAE23	This advance Construction fund type code indicates that the eventual fund code conversion planned for the funds will be from the USDOT Reconnecting Communities and Neighborhoods Grant 2023 Program with the fund awarded from the subcategory of Neighborhood Access and Equity (NAE). The awarded projects may call their award as RCN, NAE, or RCN/NAE. The grant program supports projects that advance community-centered connection transportation projects, with a priority for projects that benefit disadvantaged communities, by improving access to daily needs such as jobs, education, health care, food, nature and recreation; fostering equitable development and restoration; and reconnecting communities by removing, retrofitting, or mitigating highways or other transportation facilities that create barriers to community connectivity, including to mobility, access, or economic development.
AC-HB2017	This advance Construction fund type code indicates the anticipated later conversion code will be from HB2017 approved funds. The fund could also be from a federal source which is why the Advance Construction funds are listed as federal type funds for now.
NHFP	Federal National Highway Freight Program funds which are intended to improve the efficient movement of freight on the National Highway Freight Network (NHFN) and support several goals, including: Investing in infrastructure and operational improvements that strengthen economic competitiveness, reduce congestion, reduce the cost of freight transportation, improve reliability, and increase productivity; improving the safety, security, efficiency, and resiliency of freight transportation in rural and urban areas; improving the state of good repair of the NHFN; using innovation and advanced technology to improve NHFN safety, efficiency, and reliability; improving the efficiency and productivity of the NHFN; improving State flexibility to support multi-State corridor planning and address highway freight connectivity; and reducing the environmental impacts of freight movement on the NHFN. [23 U.S.C. 167(a) and (b)]
NHPP	A federal funding source (FHWA based) appropriated to the State DOT. The purposes of this program are: to provide support for the condition and performance of the National Highway System (NHS); to provide support for the construction of new facilities on the NHS; 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; and [NEW] to provide support for activities to increase the resiliency of the NHS to mitigate the cost of damages from sea level rise, extreme weather events, flooding, wildfires, or other natural disasters. [§ 11105(1); 23 U.S.C. 119(b)]
State	General State funds committed to the project usually to provide the minimum match requirement to the federal funds. Can also be committed as overmatch to support a specific phase.

Key Number: 19071

2018-2021 STIP

Project Name: I-5 Rose Quarter Improvement Project

(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	ACP0	ADVANCE CONSTRUCT PR	67.51%	140,000,000.00	0.00%	132,998,000.00	0.00%	7,002,000.00	0.00%	0.00	
	M002	NHPP-EXEMPT	0.77%	1,598,736.16	92.22%	1,474,354.49	7.78%	124,381.67	0.00%	0.00	
	M0E2	NATL HWY PERF EXMPT	1.22%	2,527,808.84	92.22%	2,331,145.31	7.78%	196,663.53	0.00%	0.00	
	OTH0	OTHER THAN STATE OR	1.93%	4,000,000.00	0.00%	0.00	0.00%	0.00	100.00%	4,000,000.00	
	S010	STATE	0.48%	1,000,000.00	0.00%	0.00	100.00%	1,000,000.00	0.00%	0.00	
	Y001	National Highway Perf IJJA	19.29%	40,000,000.00	0.00%	0.00	100.00%	40,000,000.00	0.00%	0.00	
	Z001	NATIONAL HIGHWAY PERF FAST	0.96%	2,000,000.00	92.22%	1,844,400.00	7.78%	155,600.00	0.00%	0.00	
	Z460	NATIONAL HWY FREIGHT PROGRAM	7.84%	16,265,452.18	92.22%	15,000,000.00	7.78%	1,265,452.18	0.00%	0.00	
	PE Totals			100.00%	207,391,997.18		153,647,899.80		49,744,097.38		4,000,000.00
RW	ACP0	ADVANCE CONSTRUCT PR	100.00%	41,000,000.00	92.22%	37,810,200.00	7.78%	3,189,800.00	0.00%	0.00	
	RW Totals			100.00%	41,000,000.00		37,810,200.00		3,189,800.00		0.00
UR	ACP0	ADVANCE CONSTRUCT PR	100.00%	7,500,000.00	100.00%	7,500,000.00	0.00%	0.00	0.00%	0.00	
	UR Totals			100.00%	7,500,000.00		7,500,000.00		0.00		0.00
OT	ACP0	ADVANCE CONSTRUCT PR	100.00%	250,000.00	100.00%	250,000.00	0.00%	0.00	0.00%	0.00	
	OT Totals			100.00%	250,000.00		250,000.00		0.00		0.00
Grand Totals					256,141,997.18		199,208,099.80		52,933,897.38		4,000,000.00



PROJECT TIMELINE




HIGHWAY COVER

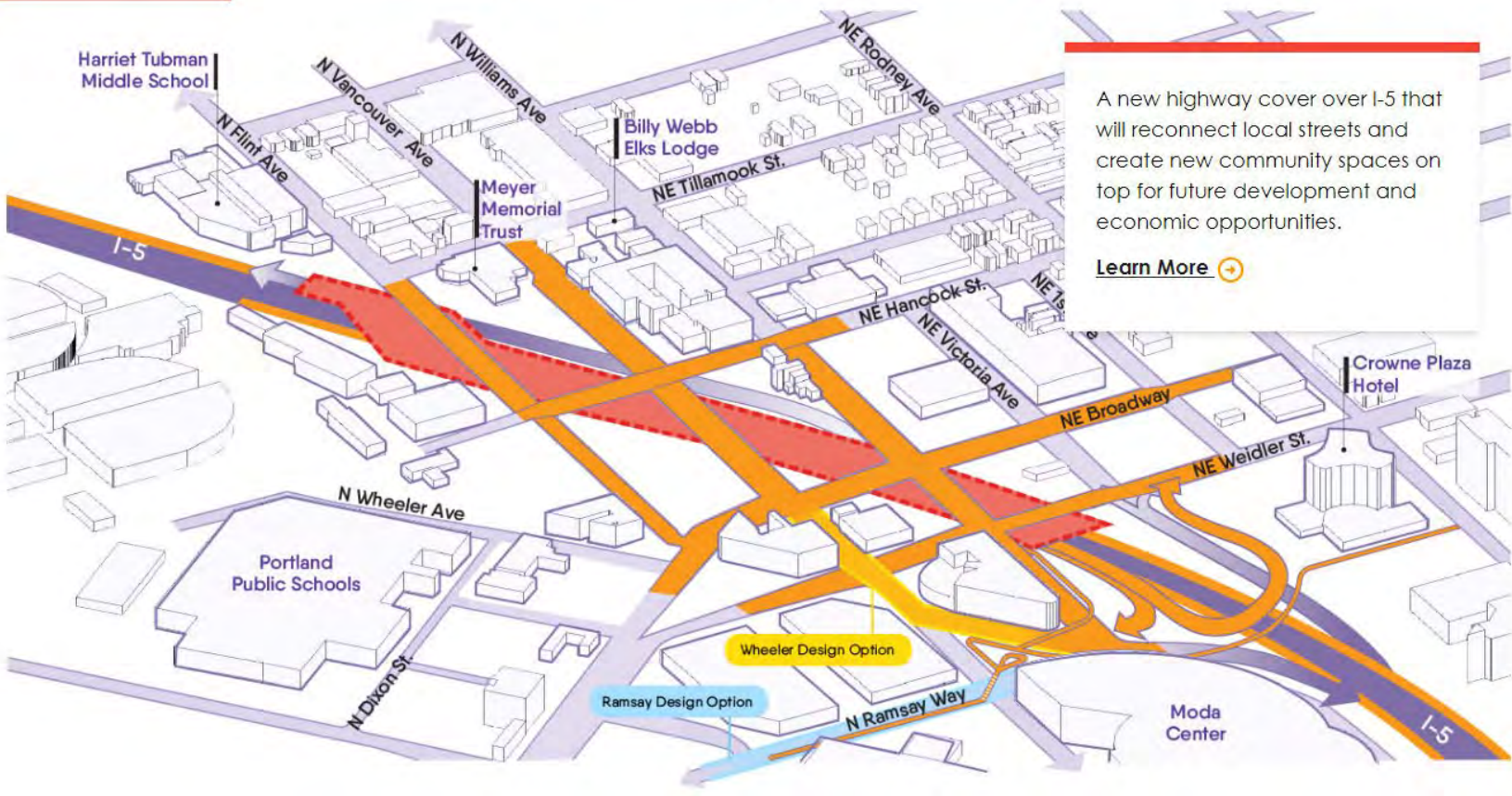

HANCOCK CROSSING


MULTIMODAL LOCAL STREET IMPROVEMENTS

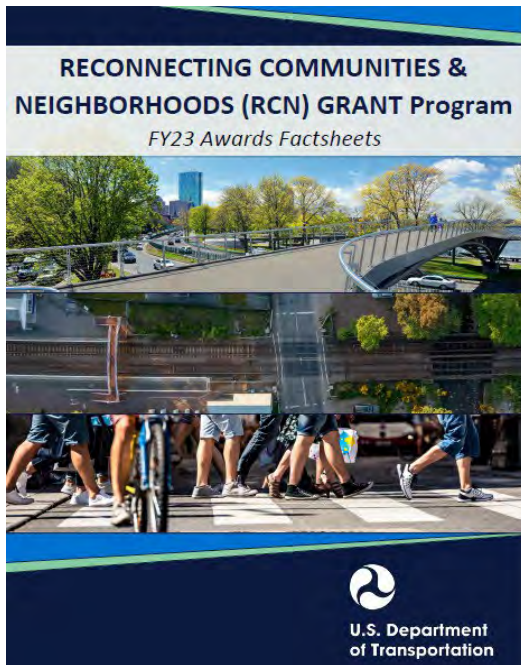

PEDESTRIAN AND BICYCLE BRIDGE


AUXILIARY LANES AND SHOULDERS


I-5 SOUTHBOUND OFF-RAMP RELOCATION



NAE	Capital	I-5 Rose Quarter Improvement Project	Oregon Department of Transportation	Oregon	\$450,000,000.00
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RCN FY23 Awards Factsheet

I-5 Rose Quarter Improvement Project

Portland, Oregon

Grant Type: Construction

Funding Source: NAE

Award: \$450,000,000

Estimated Total Project Cost: \$1,700,000,000

Project Summary:

Funding for the I-5 Rose Quarter Improvement Project will be used for the project’s design and constructing the project’s main reconnecting feature—a highway cover that will support new community space and future development, while reconnecting local streets over Interstate 5 (I-5) and providing better access to the central city and the waterfront in Portland, Oregon. Funding will be divided in the following way: \$50 million to complete the project’s design, \$80 million to complete the project’s right of way (ROW) acquisition and utility relocation phase, \$500 million to complete construction of the highway cover, \$100 million to make multimodal improvements to city streets, and \$120 million to construct a pedestrian and bicycle bridge that crosses over I-5 through the project area.

Building the highway cover is an essential first step to actualizing the community’s vision and improving the transportation network in partnership with the City of Portland. The project is further supported by the Historic Albina Advisory Board (HAAB) (the project committee consisting of Black community leaders and those with ties to the historic Albina community—the community that was divided by construction of I-5 through the project area) and Albina Vision Trust (AVT) —a nonprofit organization that links private interests and public priorities with community values for the Albina community. The project’s investments make walking, biking, rolling and accessing transit safer, creating a more pedestrian-friendly and community-oriented area. As a part of the regional effort to realize the vision to reconnect the Albina community, the City is submitting a complementary NAE Program Capital Construction Grant application to support and extend the project’s local street and community reconnection investments adjacent to the project area.



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

MTIP Formal Amendment
CANCEL PROJECT
 Cancel project and transfer funds
 to Key 23682

Project #2 **CANCEL PROJECT**

Project Details Summary							
ODOT Key #	21219	RFFA ID:	N/A	RTP ID:	12092	RTP Approval Date:	11/30/2023
MTIP ID:	71043	CDS ID:	N/A	Bridge #:	8583	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-11-JUL2	STIP Amendment ID:		24-27-1208		

Summary of Amendment Changes Occurring:
 The formal amendment cancels the project and transfers the funding to the new Rose Quarter child project in Key 23682 .

Project Name:	I-5 Over NE Hassalo St and NE Holladay St (Portland)						
Lead Agency:	ODOT	Applicant:	ODOT	Administrator:	ODOT		
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No	Delivery as Direct Recipient:	Yes		

Short Description:
 On I-5 over NE Hassalo St and NE Holladay St (BR#08583), replace the current structural overlay (HB2017 Awarded Project, \$5 million Original Award)

MTIP Detailed Description (Internal Metro use only):
 In northeastern Portland on I-5 over NE Hassalo St and NE Holladay St (at MP 301.99, BR#08583), replace the current structural overlay (HB2017 Awarded Project, \$5 million Original Award)

STIP Description:
 Replace the deck for the southbound portion of the bridge to repair damage incurred over time by vehicles and weathering.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Bridge	Reconstruction/Preservation	Capital Improvement
ODOT Work Type:	BRIDGE		

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									
AC-HB2017	ACPO	2024					-\$ 4,611,000		\$ -
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	Match	2024					-\$ 389,000		\$ -
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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:			\$ -	\$ -	\$ -	\$ -	-\$ 5,000,000	\$ -	-\$ 5,000,000
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Estimated Project Cost									\$ -
Total Cost in Year of Expenditure:									\$ -

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:	\$ -	\$ -	\$ -	\$ -	\$ (5,000,000)	\$ -	\$ (5,000,000)
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	-100.0%	0.0%	-100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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:							N/A
EA End Date:							FMIS or TRAMS
Known Expenditures:							N/A
						Estimated Project Completion Date:	N/A
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? Not Applicable
2. Does the amendment include changes or updates to the project funding? The approved funding is being combined into Key 23682
3. Was proof-of-funding documentation provided to verify the funding change? N/A
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? ODOT program approval
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? N/A

Project Location References

On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	I-5	301.95	302.03	0.08
Cross Streets	Route or Arterial	Cross Street	Cross Street	Cross Street	Cross Street
	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2019	Years Active	6	Project Status	4	(PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated).	
Total Prior Amendments	7	Last Amendment	Administrative	Date of Last Amendment	June 2022	Last MTIP Amend Num	AM22-21-JUN1
Last Amendment Action	CANCEL PHASE: The PE phase is canceled with the funding transferred to the Construction phase. The bridge deck re-design will be completed as part of the Rose Quarter improvement project. In the future ODOT expects Key 21219 to be combined into the Rose Quarter project for improved delivery efficiencies.						

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
						X		

Added notes:

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 - Widening narrow pavements or reconstructing bridges (no additional travel lanes).
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:	RTP ID# 12092 - Bridge Rehabilitation & Repair: 2023-2030
RTP Project Description:	Projects to repair or rehabilitate bridges, such as painting, joint repair, bridge deck repair, seismic retrofit, etcetera, that do not add motor vehicle capacity.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	I-5 in the project limits is designated as a Throughway
Yes	Transit	I-5 in the project limits is designated as a Frequent and Regional Bus
Yes	Freight	I-5 in the project limits is designated as a Main Roadway Route
No	Bicycle	No designation
No	Pedestrian	No designation

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	I-5	Interstate
Functional Classification	Yes	I-5	Urban Interstate
Federal Aid Eligible Facility	Yes	I-5	1 = Interstate

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 Goal: Goal # 2 -Safe System: Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.
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 June 12, 2024 to July 12, 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? Comments may occur.
6.	Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? Possible

Fund Codes References

State	General State funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-HB2017	Advance Construction funds with the expected conversion code to be HB2017 funds.

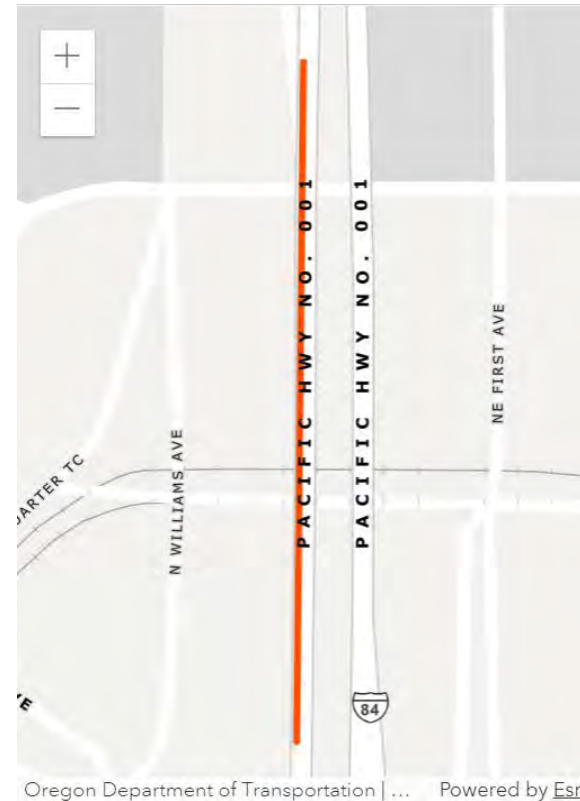
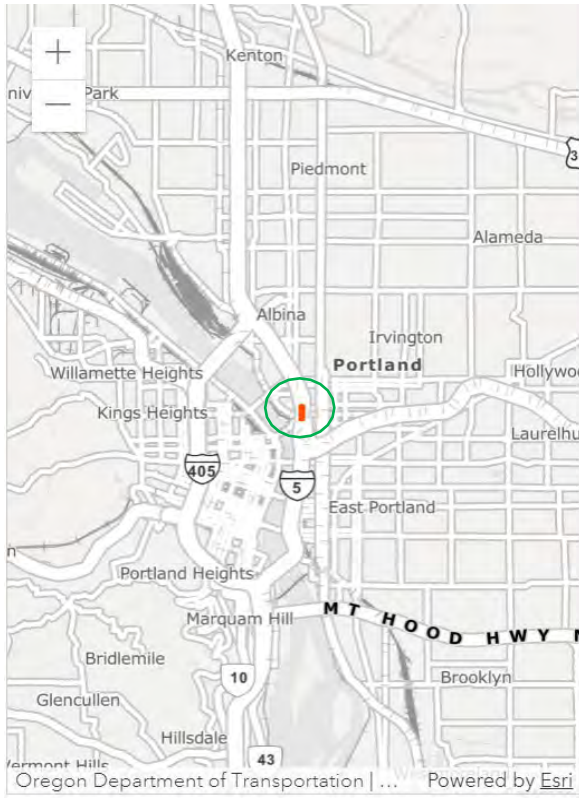
Key Number: 21219

2024-2027 STIP

Project Name: I-5 over NE Hassalo Street and NE Holladay Street

(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	Y002	NHPP National Highway perf exempt IIA	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	PE Totals		0.00%	0.00		0.00		0.00		0.00
CN	ACPO	ADVANCE CONSTRUCT PR	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	CN Totals		0.00%	0.00		0.00		0.00		0.00
Grand Totals				0.00		0.00		0.00		0.00





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

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new project with funds
 from Key 21219

Project #3

Project Details Summary							
ODOT Key #	23682	RFFA ID:	N/A	RTP ID:	11176	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-11-JUL2	STIP Amendment ID:		24-27-1279		

Summary of Amendment Changes Occurring:
 The formal amendment adds the new stormwater facilities project to the MTIP using the funds from the canceled Key 21219 project (also included in this amendment bundle).

Project Name:	I-405 and I-5 Stormwater Facilities						
Lead Agency:	ODOT	Applicant:	ODOT	Administrator:	ODOT		
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No	Delivery as Direct Recipient:	Yes		

Short Description:
 Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.

MTIP Detailed Description (Internal Metro use only):
 On I-5 from MP 301.40 to MP 303.20 in Portland, Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.

STIP Description:
 Construct stormwater facilities for the east end of Fremont Bridge and ramps to be in compliance with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project key 19071 I-5 Rose Quarter Improvement Project.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway -Motor Vehicle	Lane modification or reconfiguration	Capital Improvement
ODOT Work Type:	BRIDGE		

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									
AC-HB2017	ACPO	2025					\$ 4,611,000		\$ 4,611,000
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ 4,611,000	\$ -	\$ 4,611,000

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	Match	2025					\$ 389,000		\$ 389,000
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ 389,000	\$ -	\$ 389,000

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:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ 5,000,000	\$ -	\$ 5,000,000
Total Estimated Project Cost									\$ 5,000,000
Total Cost in Year of Expenditure:									\$ 5,000,000

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:	\$ -	\$ -	\$ -	\$ -	\$ 5,000,000	\$ -	\$ 5,000,000
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ 389,000	\$ -	\$ 389,000
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	7.78%	N/A	7.78%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ 4,611,000	\$ -	\$ 4,611,000
State	\$ -	\$ -	\$ -	\$ -	\$ 389,000	\$ -	\$ 389,000
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ 5,000,000	\$ -	\$ 5,000,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	92.22%	0.0%	92.22%
State	0.0%	0.0%	0.0%	0.0%	7.78%	0.0%	7.78%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	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%	92.22%	0.0%	92.2%
State	0.0%	0.0%	0.0%	0.0%	7.78%	0.0%	7.8%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	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:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
Completion Date Notes:					Estimated Project Completion Date:		12/31/2028
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? **HB2017 Seismic Bridge funds pulled from Key 21219.**
2. Does the amendment include changes or updates to the project funding? **The funds from Key 21219 are being applied to this new child project to the Rose Quart Improvement Project in Key 19071.**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **ODOT Program Manager**
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	I-5	301.40	303.20	1.8
Cross Streets	Route or Arterial	Cross Street	Cross Street	Cross Street	Cross Street
	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2025	Years Active	0	Project Status	6	= Pre-construction activities (pre-bid, construction management oversight, etc.).	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	N/A	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Equity Notes POC = No LEP = No LI = Yes
				X		X		
Added notes:								
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:				RTP ID# 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)				
RTP Project Description:				ID 11176: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.				
Project Location in the Metro Transportation Network								
Yes/No	Network			Designation				
Yes	Motor Vehicle			I-5 in the project limits is designated as a Throughway				
Yes	Transit			I-5 in the project limits is designated as a Frequent and Regional Bus				
Yes	Freight			I-5 in the project limits is designated as a Main Roadway Route				
No	Bicycle			No designation				
No	Pedestrian			No designation				

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	I-5	Interstate
Functional Classification	Yes	I-5	Urban Interstate
Federal Aid Eligible Facility	Yes	I-5	1 = Interstate

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 Goal: <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.
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 June 12, 2024 to July 12, 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? Comments may occur.
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? Possible

Fund Codes References

State	General State funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-HB2017	Advance Construction funds with the expected conversion code to be HB2017 funds.

2024-2027 Active STIP		MULTNOMAH		2024-2027 Active STIP			
Name: I-5 over NE Hassalo Street and NE Holladay Street (Portland)			Key: 21219				
Description: Replace the deck for the southbound portion of the bridge to repair damage incurred over time by vehicles and weathering.					Region: 1		
MPO: Portland Metro MPO			Work Type: BRIDGE				
Applicant: ODOT			Status: PROJECT SCHEDULED FOR CONSTRUCTION				
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
301.95 to 302.03	0.08	I-5	PACIFIC HIGHWAY	REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2025		
Total					\$5,000,000.00		\$5,000,000.00
Fund 1				ACP0	\$4,611,000.00		
Match					\$389,000.00		
Footnote:							
Most Recent Approved Amendment							
Amendment No: 24-27-0800			Approval Date: 3/29/2024				
Requested Action: Slip the Construction phase to start in federal fiscal year 2025.							

Financial Plan -- Estimate / Actual Amounts								
Phase	Funding Resp	STIP	Year	Total Est/Act Amt	Fed Est/Act Amt	State Est/Act Amt	Local Est/Act Amt	Comment
CN	HB2017 BridgeSeismic	2024-2027 STIP	2025	5,000,000.00	4,611,000.00	389,000.00	0.00	06/07/2024: Add \$%M CN phase from K21219 per 24-27-1279
	CN Totals			5,000,000.00	4,611,000.00	389,000.00	0.00	
Grand Totals				5,000,000.00	4,611,000.00	389,000.00	0.00	

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
CN	ACP0	ADVANCE CONSTRUCT PR	100.00%	5,000,000.00	92.22%	4,611,000.00	7.78%	389,000.00	0.00%	0.00
	CN Totals		100.00%	5,000,000.00		4,611,000.00		389,000.00		0.00
Grand Totals				5,000,000.00		4,611,000.00		389,000.00		0.00







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

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new project with NAE23 funds to construct RQ cover segment

Project #4

Project Details Summary							
ODOT Key #	23672	RFFA ID:	N/A	RTP ID:	11176	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-11-JUL2		STIP Amendment ID:		24-27-1241	

Summary of Amendment Changes Occurring:
 The formal amendment adds the new Rose Quarter construction child project that will replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler

Project Name:	I-5 Rose Quarter: Broadway to Weidler Phase 1						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes	

Short Description:
 Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and supporting facilities and complete compatibility construction for follow-on packages

MTIP Detailed Description (Internal Metro use only):
 On I-5 from MP 301.40 to MP 303.20 in Portland, Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement Project (Chiles project to Key 19071, USDOT NAE23 grant funds for construction)

STIP Description:
 Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement Project.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway -Motor Vehicle	Lane modification or reconfiguration	Capital Improvement
ODOT Work Type:	MODERN		

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									
AC-NAE23	ACPO	2025					\$ 382,250,000		\$ 382,250,000
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000

Note: The programming is using federal Advance Construction with the conversion expectation to be USDOT federal Reconnecting Communities and Neighborhoods Grant 2023, Neighborhood Access, and Equity (NAE) 2023 discretionary grant. The funds are 100% federal. No required match.

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 Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Phase Totals	Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals	\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000
Total Estimated Project Cost							\$ 382,250,000
Total Cost in Year of Expenditure:							\$ 382,250,000

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:	\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000
Phase Change Percent:	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	0.00%	N/A	0.00%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	100.00%	0.0%	100.00%
State	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	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%	100.00%	0.0%	100.0%
State	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	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:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
					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	

Fiscal Constraint Consistency Review

1. What is the source of funding? **USDOT Reconnecting Communities and Neighborhoods Grant 2023 Program with the fund awarded from the subcategory of Neighborhood Access and Equity (NAE)**
2. Does the amendment include changes or updates to the project funding? **Yes. \$382 million of the total \$450 million are being added to the MTIP**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, via project award verification form USDOT**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **Approval was required from USDOT.**
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	I-5	301.40	303.20	1.8
Cross Streets	Route or Arterial	Cross Street	Cross Street		
	Multiple	Before and after I-5 intersections			

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2025	Years Active	0	Project Status	6	Pre-construction activities (pre-bid, construction management oversight, etc.).	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	N/A	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Equity Notes POC = No LEP = No LI = Yes
				X	X	X	X	
Added notes:								
RTP Air Quality Conformity and Transportation Modeling Designations								
Is this a capacity enhancing or non-capacity enhancing project?				Non-capacity enhancing project (This specific segment)				
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:				RTP ID# 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)				
RTP Project Description:				ID 11176: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.				
Project Location in the Metro Transportation Network								
Yes/No	Network			Designation				
Yes	Motor Vehicle			I-5 in the project limits is designated as a Throughway				
Yes	Transit			I-5 in the project limits is designated as a Frequent and Regional Bus				
Yes	Freight			I-5 in the project limits is designated as a Main Roadway Route				
No	Bicycle			No designation				
No	Pedestrian			No designation				

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	I-5	Interstate
Functional Classification	Yes	I-5	Urban Interstate
Federal Aid Eligible Facility	Yes	I-5	1 = Interstate

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.	<p>Applicable RTP Goal:</p> <p><u>Goal # 1 - Mobility Options</u> Objective 1.1 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.</p> <p><u>Goal # 2 -Safe System:</u> Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.</p> <p><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.</p>
5.	Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing, the 100 million funding ceiling does not apply for this non-capacity enhancing project.

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 June 12, 2024 to July 12, 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? Comments may occur.
6.	Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? Possible







Fund Codes References

Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-NAE23	This advance Construction fund type code indicates that the eventual fund code conversion planned for the funds will be from the USDOT Reconnecting Communities and Neighborhoods Grant 2023 Program with the fund awarded from the subcategory of Neighborhood Access and Equity (NAE). The awarded projects may call their award as RCN, NAE, or RCN/NAE. The grant program supports projects that advance community-centered connection transportation projects, with a priority for projects that benefit disadvantaged communities, by improving access to daily needs such as jobs, education, health care, food, nature and recreation; fostering equitable development and restoration; and reconnecting communities by removing, retrofitting, or mitigating highways or other transportation facilities that create barriers to community connectivity, including to mobility, access, or economic development.

Financial Plan -- Estimate / Actual Amounts								
Phase	Funding Resp	STIP	Year	Total Est/Act Amt	Fed Est/Act Amt	State Est/Act Amt	Local Est/Act Amt	Comment
CN	USDOT Grants 2023	2024-2027 STIP	2025	382,250,000.00	382,250,000.00	0.00	0.00	05/2024: Add 382.25M CN 100% federal per 24-27-1208
	CN Totals			382,250,000.00	382,250,000.00	0.00	0.00	
Grand Totals				382,250,000.00	382,250,000.00	0.00	0.00	

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
CN	ACPO	ADVANCE CONSTRUCT PR	100.00%	382,250,000.00	100.00%	382,250,000.00	0.00%	0.00	0.00%	0.00
	CN Totals			100.00%	382,250,000.00		382,250,000.00		0.00	
Grand Totals					382,250,000.00	382,250,000.00		0.00		0.00



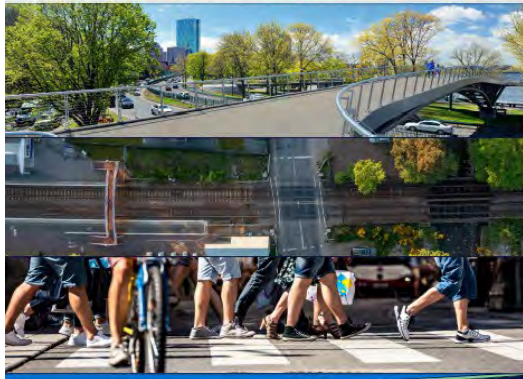
 <p>HIGHWAY COVER</p>	 <p>HANCOCK CROSSING</p>	 <p>MULTIMODAL LOCAL STREET IMPROVEMENTS</p>	 <p>PEDESTRIAN AND BICYCLE BRIDGE</p>	 <p>AUXILIARY LANES AND SHOULDERS</p>	 <p>I-5 SOUTHBOUND OFF-RAMP RELOCATION</p>
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A new highway cover over I-5 that will reconnect local streets and create new community spaces on top for future development and economic opportunities.

[Learn More](#)

RECONNECTING COMMUNITIES & NEIGHBORHOODS (RCN) GRANT Program

FY23 Awards Factsheets



U.S. Department
of Transportation

RCN FY23 Awards Factsheet

I-5 Rose Quarter Improvement Project

Portland, Oregon

Grant Type: Construction

Funding Source: NAE

Award: \$450,000,000

Estimated Total Project Cost: \$1,700,000,000

Project Summary:

Funding for the I-5 Rose Quarter Improvement Project will be used for the project's design and constructing the project's main reconnecting feature—a highway cover that will support new community space and future development, while reconnecting local streets over Interstate 5 (I-5) and providing better access to the central city and the waterfront in Portland, Oregon. Funding will be divided in the following way: \$50 million to complete the project's design, \$80 million to complete the project's right of way (ROW) acquisition and utility relocation phase, \$500 million to complete construction of the highway cover, \$100 million to make multimodal improvements to city streets, and \$120 million to construct a pedestrian and bicycle bridge that crosses over I-5 through the project area.

Building the highway cover is an essential first step to actualizing the community's vision and improving the transportation network in partnership with the City of Portland. The project is further supported by the Historic Albina Advisory Board (HAAB) (the project committee consisting of Black community leaders and those with ties to the historic Albina community—the community that was divided by construction of I-5 through the project area) and Albina Vision Trust (AVT)—a nonprofit organization that links private interests and public priorities with community values for the Albina community. The project's investments make walking, biking, rolling and accessing transit safer, creating a more pedestrian-friendly and community-oriented area. As a part of the regional effort to realize the vision to reconnect the Albina community, the City is submitting a complementary NAE Program Capital Construction Grant application to support and extend the project's local street and community reconnection investments adjacent to the project area.



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

MTIP Formal Amendment
ADD NEW PROJECT
 Add Portland's new NAE grant
 award project to the MTIP

Project #5

Project Details Summary							
ODOT Key #	23646	RFFA ID:	N/A	RTP ID:	11646	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	NAE	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		JL24-11-JUL2		STIP Amendment ID:		24-27-1081	

Summary of Amendment Changes Occurring:
 The formal amendment adds the new USDOT Neighborhood Access and Equity (NAE) Program/Reconnecting Communities Pilot (RCP) Program grant awarded project to the MTIP for Portland.

Project Name:	Broadway Main Street and Supporting Connections						
Lead Agency:	Portland	Applicant:	Portland	Administrator:	ODOT		
Certified Agency Delivery:	Yes	Non-Certified Agency Delivery:	No	Delivery as Direct Recipient:	No		

Short Description:
 Complete multiple complete street upgrades enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services.

MTIP Detailed Description (Internal Metro use only):
 In NE Portland on N. Larrabee Ave (I-5 ramp south to N. Broadway St), N. Broadway St/NE Broadway St from N. Larrabee Ave to NE 7th Ave), and on N/NE Weidler St (N Broadway St east to NE 7th Ave), complete multiple complete street upgrades enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services.
(Optional if room -->) Provide upgraded and protected lanes for biking and scooting, restoration of managed on-street parking and loading, additional tree canopy, green infrastructure, street lighting, and other streetscape amenities for greater access and connectivity to Portland's Lower Albina neighborhood.

STIP Description:

Project will include enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services. Upgraded and protected lanes for biking and scooting. Restoration of managed on-street parking and loading. Additional tree canopy, green infrastructure, street lighting, and other streetscape amenities. Placemaking opportunities to honor the district's history through public art, street activation, and monumentation. Project will result in greater access and connectivity to Portland's Lower Albina neighborhood.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Active Transportation/ Complete Streets ODOT Work Type:	Active Trans - Bike	Separated (aka Protected) Lanes	Capital Improvement
	Active Trans - Pedestrian	Sidewalk Reconstruction	
	Active Trans - Transit	Crossing Treatments	
	Active Trans - Motor Vehicle	Capital - Passenger Facilities	
	BIKPED	Preservation and Maintenance	

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									
AC-NAE23	ACPO	2025		\$ 8,255,000					\$ 8,255,000
AC-NAE23	ACPO	2026			\$ 591,000				\$ 591,000
AC-NAE23	ACPO	2026				\$ 130,000			\$ 130,000
AC-NAE23	ACPO	2026					\$ 29,418,000		\$ 29,418,000
Federal Totals:			\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000	\$ -	\$ 38,394,000

Note: The USDOT NAE grant award is 100% federal. No minimum match required

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 Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Phase Totals	Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:	\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000		\$ -
Amended Programming Totals	\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000	\$ -	\$ 38,394,000
Total Estimated Project Cost							\$ 38,394,000
Total Cost in Year of Expenditure:							\$ 38,394,000

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:	\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000	\$ -	\$ 38,394,000
Phase Change Percent:	0.0%	100.0%	100.0%	100.0%	0.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	N/A	0.00%	0.00%	0.00%	0.00%	N/A	0.00%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000	\$ -	\$ 38,394,000
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ 8,255,000	\$ 591,000	\$ 130,000	\$ 29,418,000	\$ -	\$ 38,394,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%
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%	0.0%	0.0%
Total	0.0%	100.0%	100.0%	100.0%	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%	21.5%	1.5%	0.3%	76.6%	0.0%	100.0%
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%	0.0%	0.0%
Total	0.0%	21.5%	1.5%	0.3%	76.6%	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:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
						Estimated Project Completion Date:	12/31/2029
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? **USDOT FFY 2023 discretionary RECONNECTING COMMUNITIES & NEIGHBORHOODS (RCN) GRANT Program**
2. Does the amendment include changes or updates to the project funding? **Yes. Adds new discretionary grant awarded federal funds to the MTIP**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes. Grant award letter and USDOT award list provided.**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **No ODOT, but ISDOT approval 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
		N. Larrabee Ave	I-5 ramps		North Broadway
		N. Broadway/NE Broadway	N. Larrabee Ave		NE 7th Ave
		N/NE Weidler St	North Broadway intersection		NE 7th Ave

Note: See project location map at end of Exhibit A/MTIP Worksheet.

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification

1st Year Programmed	2025	Years Active	0	Project Status	2	Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)	
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	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	EFA Notes POC = No LEP = No LI - Yes
				X	X	X	X	
Added notes:								

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. Air Quality - Bicycle and pedestrian facilities.
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# 11646 - Broadway/Weidler Corridor Improvements
RTP Project Description:	Enhance existing bike lanes and improve pedestrian/bicycle crossings. Add traffic signals, improve signal timing, improve transit stops, provide transit priority treatments, and construct streetscape improvements.

Project Location in the Metro Transportation Network		
Yes/No	Network	Designation
Yes	Motor Vehicle	N Larrabee Ave = Major/Minor arterial designation
		N/NE Broadway St = Major/Minor arterial designation
		N/NE Weidler St = Major/Minor arterial designation
Yes	Transit	N Larrabee Ave = No designation
		N/NE Broadway = Light rail/streetcar designation
		N/NE Weidler St = Light rail/streetcar designation

Yes (Partial)	Freight	N Larrabee Ave = no designation
		N/NE Broadway St = Eastern portion is designated as a regional intermodal connector
		N/NE Weidler St = No designation
Yes	Bicycle	N Larrabee Ave = No designation
		N/NE Broadway St = Bicycle Parkway designation
		N/NE Weidler St = Bicycle Parkway designation
Yes	Pedestrian	N Larrabee Ave = Regional Pedestrian Corridor designation
		N/NE Broadway St = Pedestrian Parkway designation
		N/NE Weidler St = Pedestrian Parkway arterial designation

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	Yes	N Larrabee Ave	No designation
		N/NE Broadway St	NHS Intermodal Connector and Other NHS Route
		N/NE Weidler St	NHS Intermodal Connector and Map 21 Principal Arterials
Functional Classification	Yes	N Larrabee Ave	No designation
		N/NE Broadway St	Urban Other Principal Arterial
		N/NE Weidler St	Urban Other Principal Arterial
Federal Aid Eligible Facility	Yes	N Larrabee Ave	No designation
		N/NE Broadway St	3 = Other Principal Arterial
		N/NE Weidler St	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? 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 RTP Goals:

Goal # 1 - Mobility Options

Objective 1.1 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.

Goal #2 - Safe System:

Objective 2.1 - Vision Zero: Eliminate fatal and severe injury crashes for all modes of travel by 2035.

Goal 3 - Equitable Transportation:

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

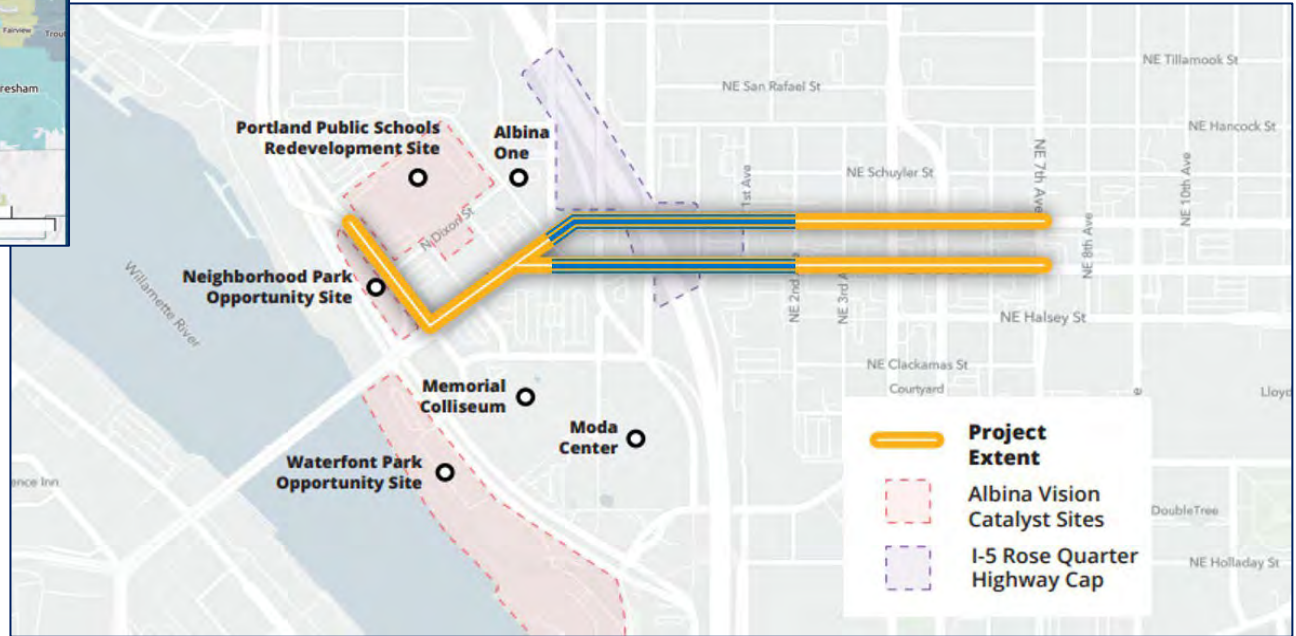
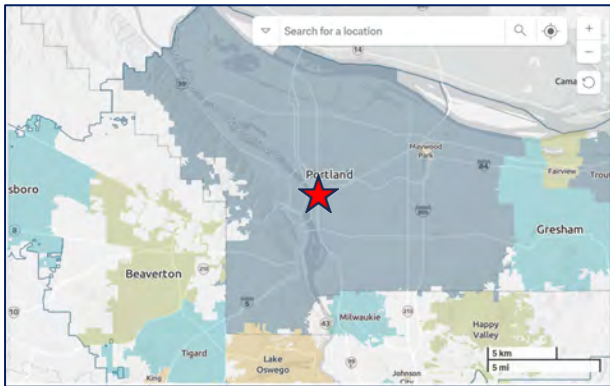
1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be June 12, 2024 to July 12, 2024**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. 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

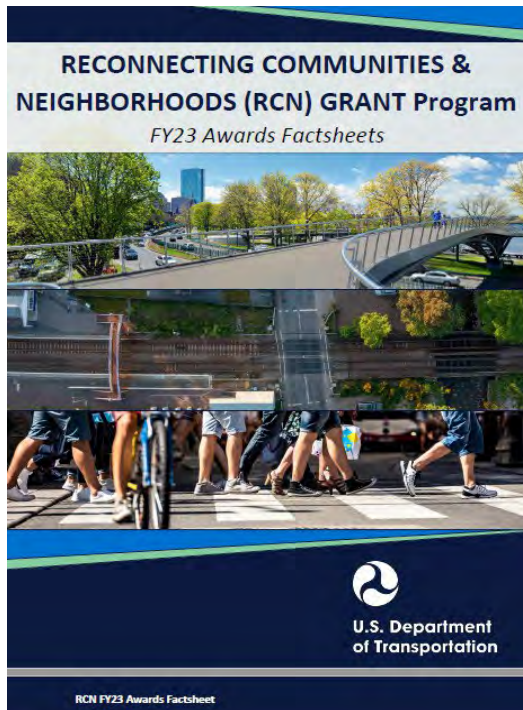
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-NAE23	Advance Construction funds with the expected conversion code identified to be from the USDOT FFY 2023 NAE grant program. The awarded funds are 100% federal. There is no minimum match requirement.

Project Name: Broadway Main Street and Supporting Connections (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	ACPO	ADVANCE CONSTRUCT PR	100.00%	8,255,000.00	100.00%	8,255,000.00	0.00%	0.00	0.00%	0.00
	PE Totals		100.00%	8,255,000.00		8,255,000.00		0.00		0.00
RW	ACPO	ADVANCE CONSTRUCT PR	100.00%	591,000.00	100.00%	591,000.00	0.00%	0.00	0.00%	0.00
	RW Totals		100.00%	591,000.00		591,000.00		0.00		0.00
UR	ACPO	ADVANCE CONSTRUCT PR	100.00%	130,000.00	100.00%	130,000.00	0.00%	0.00	0.00%	0.00
	UR Totals		100.00%	130,000.00		130,000.00		0.00		0.00
CN	ACPO	ADVANCE CONSTRUCT PR	100.00%	29,418,000.00	100.00%	29,418,000.00	0.00%	0.00	0.00%	0.00
	CN Totals		100.00%	29,418,000.00		29,418,000.00		0.00		0.00
Grand Totals				38,394,000.00		38,394,000.00		0.00		0.00



NAE	Capital	Broadway Main Street and Supporting Connections	City of Portland	Oregon	\$38,394,000.00
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Broadway Main Street and Supporting Connections

Portland, Oregon

Grant Type: Construction

Funding Source: NAE

Award: \$38,394,000

Estimated Total Project Cost: \$38,394,000

Project Summary:

The Broadway Main Street & Supporting Neighborhood Connections Project will construct multimodal safety and streetscape improvements N/NE Broadway and N/NE Weidler St, two arterials that make up a wide, high-volume couplet that serves as the primary connection across Interstate 5 (I-5) in inner North/Northeast Portland, Oregon and as the neighborhood's gateway to downtown.

The project improves access and connectivity and foster equitable development and restoration in the heart of the city's historic Black neighborhood, Lower Albina. Located in an underserved community designated as both historically disadvantaged and an area of persistent poverty, the project is designed to support realization of the community's vision for the area.

This project will reconnect Lower Albina to neighborhoods and key destinations across I-5, a major grade separated facility that divided the neighborhood and displaced hundreds of residents when it was constructed. It will also improve connections within the community itself across N Broadway, the widest street in Portland's Central City, and the N/NE Broadway/Weidler couplet, making those busy streets more welcoming to current and future residents, employees, and visitors of the area.



Memo

Date: July 15, 2024
To: Metro Council and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: July #2 FFY 2024 MTIP Formal Amendment & Resolution 24-5424 Approval Request – JL24-11-JUL2

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

FOR THE PURPOSE OF AMENDING THE 2024-27 MTIP TO REVISE THE ROSE QUARTER IMPROVEMENT PROJECT, CANCEL A PROJECT, AND ADD THREE NEW PROJECTS TO MEET FEDERAL TRANSPORTATION PROJECT DELIVERY REQUIREMENTS

BACKGROUND

What This Is - Amendment Summary:

The July #2 2024 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment is the second of two submitted July 2024 formal amendment bundles. This formal amendment has separated the required updates to the Rose Quarter Improvement Project from the regular July formal amendment in JL24-10-JUL1. The Rose Quarter Improvement Project amendment bundle will proceed under Resolution number 24-5424. There are five projects in this bundle. They include the following:

- **Key 19071 – I-5 Rose Quarter Improvement Project:**
The project will complete multi-modal improvements that include ramp-to-ramp auxiliary lanes, highway shoulders, highway covers, new overcrossing, SB ramp relocation, new bike/ped crossing and bike/ped facilities. The amendment includes updates to the Preliminary Engineering (PE), and Right-of-Way (ROW) phases. A new Utility Relocation (UR) phase is being added, and a new partially funded construction phase is being added using the \$450 million grant award funding from USDOT Neighborhood Access and Equity (NAE) Program/Reconnecting Communities Pilot (RCP) Program.

The NAE \$450 million grant enables the first phase of construction to be implemented and delivered. This first phase is focused on the project's highway cover. ODOT is proposing to use \$382 million to construct the initial, central portion of the highway cover scope element to the project. The central portion of the highway cover, between approximately Weidler and Broadway over I-5, would be built to be forward compatible with future phases of the highway cover construction and I-5 mainline improvements under the highway cover.

This portion is being programmed in Key 23682. The construction phase for this scope element is being programmed as a “child” project in Key 23682 to the main parent project in Key 19071. Key 19071 contains the preliminary engineering (PE) and right-of-way (ROW) funding for the project which is why it is referred to as the parent project.

A summary of the five projects is shown below:

- Key 21219 - I-5 Over NE Hassalo St and NE Holladay St (Portland) (ODOT):**
The lead agency/applicant for the project is ODOT. The project is located on I-5 over NE Hassalo St and NE Holladay St (BR#08583) and would replace the current structural overlay. However, ODOT, will now use the programmed \$5 million to support the required stormwater facilities upgrades within the rose Quarter project limits. The July #2 MTIP Fromal Amendment cancels Key 21219 and transfers the \$5 million to support the new Stormwater Facilities child project in Key 23682.
- New Child Project - Key 23682 - I-405 and I-5 Stormwater Facilities (ODOT):**
This is one of two new child projects (to the parent project in Key 19071) being added to the MTIP supporting the Rose Quarter Improvement Project. This new project will address required stormwater facility upgrades within the Rose Quarter limits. The project will utilize the \$5 million of ODIOT funds currently programmed in Key 21219. Since PE and ROW phase activities are being completed under Key 19071, only the construction phase is needed to be programmed for Key 23682. This is how Key 23682 becomes a child project to Key 19071.
- New Child Project - Key 23672 - I-5 Rose Quarter: Broadway to Weidler Phase 1 (ODOT):**
This is the second child project to the parent project in Key 19071 being added to the MTIP. The project will Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler and supporting facilities plus complete compatibility construction for follow-on packages. The required \$382 million to complete the construction phase is being sourced from the new NAE \$450 million grant ODOT secured from USDOT.
- New Project Key 23646 - Broadway Main Street and Supporting Connections (Portland):**
This is a separate project to the I-5 Rose Quarter Improvement Project package. However, there is an implementation and delivery connection to the I-5 Rose Quarter Improvement. The city of Portland is the lead agency for the project. The project will complete multiple complete street upgrades enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services. The



project funding originates from Portland’s successful effort to also secure a \$38 million USDOT NAE23 grant.

What is the requested action?

JPACT met on July 18, 2024 and are anticipated will approve Resolution 24-5424 and provide Metro Council a final approval recommendation for Resolution 24-5424 to complete the required updates and changes to the I-5 Rose Quarter Improvement Project amendment bundle.

TPAC July 12, 2024 Meeting Summary:

TPAC met on July 12, 2024. Ken Lobeck, Metro Funding Program Lead provided TPAC members with their official notification and project overview for the July #2 2024 I-5 Rose Quarter MTIP Formal Amendment bundle in Resolution 24-5424. Ken Lobeck explained the five project bundle contacts and their relationship. He provided a brief overview of each project and explained the MTIP programming concept of “parent” versus “child” projects.

Metro 2024-27 MTIP Formal Amendment Comment Log				
I-5 Rose Quarter Improvement Project Bundle				
Resolution 24-5424, Amendment Number JL24-11-JUL2				
Submitted Comments				
Num	Date	Name	Email or Comment Type Submission If Not Email	Comment
1	7/10/2024	Chris Smith	chris@chrissmith.us	Comments letter submitted with various concerns cited about the project. Also included support areas.
2	7/10/2024	Joe Cortright	jcortright@gmail.com	Co-submission of comments noted above.

Before the overview, TPAC members heard testimony from Chris Smith, No More Freeways coalition and Joe Cortright, City Observatory. Their testimony is based on the two major comments submitted to Metro through the Public Notification/Comment Period held from June 12, 2024 to July 12, 2024.

Mr. Smith identified various concerns the No More Freeways group has with the project including future funding needs required to complete the project. Mr. Smith cited a submitted comments letter he sent to TPAC and Metro Council Office. Note: the comments letter is included with this staff report as Attachment 3. Mr. Smith also provide a few areas of support from the No More Freeways group which included support for the Highway Covers portion to the project.

Mr. Cortright’s testimony presented multiple objections to the project. In his view, building wider freeways is not the solution we should be focusing upon. He believes that ODOT has not properly identified the full impacts the project will have on the region. With the removal of tolling and congestion pricing as congestion management tool, the project is drastically out of step with the region’s needs and our ability to properly manage congestion issues.

After the overview, Ken turned over the presentation to Megan Channell, ODOT I-5 Rose Quarter Improvement Project Manager to clarify project delivery areas and answer TPAC

member questions. Several members raised questions about the project delivery timeline, future unresolved project funding needs, impacts to the I-5 project limits while this construction package is being delivered. She also stated that ODOT will be providing a more detailed overview to JPACT members on July 18, 2024. With no further questions or discussion, TPAC provided their approval recommendation to JPACT for Resolution 24-54-24 and the five included projects within the bundle. There was one TPAC member who abstained from voting.

JPACT July 18, 2024 Meeting Summary:

JPACT will meet on July 18, 2024. The July #2, 2024 I-5 Rose Quarter Improvement Project MTIP Formal Amendment is scheduled to be an action item on the agenda. ODOT will be providing a short presentation and be available to answer project delivery questions. At this time, staff anticipates that JPACT will approve Resolution 24-5424 and provide a final approval recommendation to Metro Council. However, if any notable issues and discussion occurs at JPACT, staff will report their significance to Metro Council.

A summary of the projects follows:

- **Key 19071 - I-5 Rose Quarter Improvement Project:**
 - Lead Agency: ODOT.
 - Description: Key 19071 is considered the parent project for the overall Rose Quarter improvements. The project will complete required planning, project development, and right of way efforts of the Broadway-Weidler facility plan and the N/NE Quadrant, to reduce congestion, improve safety and operations, plus support economic growth. Multi-modal improvements will include ramp-to-ramp (auxiliary) lanes, highway shoulders a highway cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities.
 - Funding Summary: ODOT received a \$450,000,000 grant from the USDOT Neighborhood Access and Equity (NAE) Program/Reconnecting Communities Pilot (RCP) Program. The grant award is 100% federal. There are no matching funds required. ODOT is committing \$67,750,000 from the NAE grant to update the PE and ROW phases plus add the UR and Other phases. A construction phase is not being added to this project. This will occur by adding “child” projects with construction phase funding. The new Broadway to Weidler – Phase 1 in Key 23646 and Stormwater Facilities upgrades in Key 23682 are two new child projects being added as part of this amendment bundle that support the Rose Quarter parent project in Key 19071. The programming updates occurring to the amendment bundle projects do not represent the full project cost which is estimated between a range of \$1.5 billion to \$1.9 billion. Additional child projects supporting Key 19071 to complete the Rose Quarter Improvement Project will be submitted for MTIP and STIP inclusion at a later time.

RECONNECTING COMMUNITIES & NEIGHBORHOODS (RCN) GRANT Program

FY23 Awards Factsheets

RCN FY23 Awards Factsheet

I-5 Rose Quarter Improvement Project

Portland, Oregon

Grant Type: Construction

Funding Source: NAE

Award: \$450,000,000

Estimated Total Project Cost: \$1,700,000,000

Project Summary:

Funding for the I-5 Rose Quarter Improvement Project will be used for the project's design and constructing the project's main reconnecting feature—a highway cover that will support new community space and future development, while reconnecting local streets over Interstate 5 (I-5) and providing better access to the central city and the waterfront in Portland, Oregon. Funding will be divided in the following way: \$50 million to complete the project's design, \$80 million to complete the project's right of way (ROW) acquisition and utility relocation phase, \$500 million to complete construction of the highway cover, \$100 million to make multimodal improvements to city streets, and \$120 million to construct a pedestrian and bicycle bridge that crosses over I-5 through the project area.

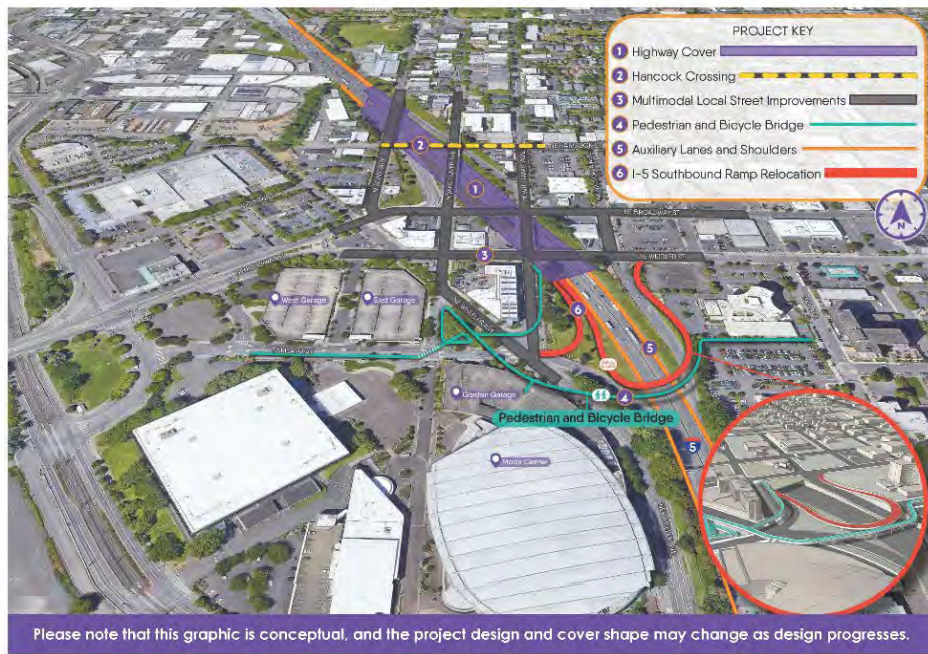
Building the highway cover is an essential first step to actualizing the community's vision and improving the transportation network in partnership with the City of Portland. The project is further supported by the Historic Albina Advisory Board (HAAB) (the project committee consisting of Black community leaders and those with ties to the historic Albina community—the community that was divided by construction of I-5 through the project area) and Albina Vision Trust (AVT) —a nonprofit organization that links private interests and public priorities with community values for the Albina community. The project's investments make walking, biking, rolling and accessing transit safer, creating a more pedestrian-friendly and community-oriented area. As a part of the regional effort to realize the vision to reconnect the Albina community, the City is submitting a complementary NAE Program Capital Construction Grant application to support and extend the project's local street and community reconnection investments adjacent to the project area.

- Action: The formal amendment provides funding increases to Key 19071 to the PE and ROW phases, adds a new UR phase, and adds a new Other phase.

- Added Notes: ODOT maintains a project website at [Welcome | I-5 Rose Quarter Improvement Project \(i5rosequarter.org\)](http://Welcome | I-5 Rose Quarter Improvement Project (i5rosequarter.org)). From this website, additional project details are included. Two attachments from the project website are included as part of the amendment staff report:
 - Attachment 1: Rose Quarter General Fact Sheet
 - Attachment 2: Rose Quarter Project FAQs

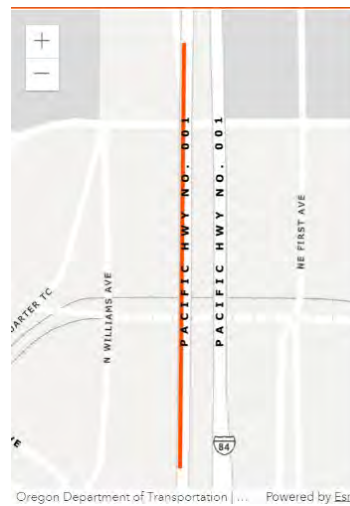


- | | | |
|--|---|--|
| <p>1 Highway Cover
A new highway cover over I-5 that will reconnect local streets and create new community spaces on top for future development and economic opportunities.</p> | <p>3 Multimodal Local Street Improvements
A variety of street improvements for people walking, biking and rolling.</p> | <p>5 Auxiliary Lanes and Shoulders
Ramp-to-ramp connections on I-5 between I-84 and I-405, paired with wider shoulders, that will improve safety and reduce congestion at the state's top bottleneck. An estimated one-third of traffic will be able to stay on these ramp-to-ramp connections between interstates instead of merging and causing congestion and safety issues.</p> |
| <p>2 Hancock Crossing
A new east-west roadway crossing over I-5 that will reconnect Hancock Street across the highway, adding another crossing north of Broadway and Weidler.</p> | <p>4 Pedestrian and Bicycle Bridge
A car-free bridge creates a new path over I-5 to connect with the walking and biking network.</p> | <p>6 I-5 Southbound Ramp Relocation
Relocation of the I-5 southbound off-ramp from Vancouver/Broadway to the south, connecting with NE Williams Avenue and NE Weidler Street.</p> |



- **Key 21219 - I-5 Over NE Hassalo St and NE Holladay St (Portland):**

- Lead Agency: ODOT.
- Description: The project is located on I-5 over NE Hassalo St and NE Holladay St (BR#08583) and will replace the current structural overlay.
- Funding Summary: The project contains a total \$5 million HB2017 funding award.
- Action: The formal amendment proposes to combine Key 21219 into the larger Rose Quarter project in Key 19071 for delivery efficiencies.



- **New Child Project - Key 23682 - I-405 and I-5 Stormwater Facilities (ODOT):**

- Lead Agency: ODOT.
- Description: The project will construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.
- Funding Summary: The project contains \$5 million to complete the construction activity. The funding is being transferred from Key 21219, I-5 Over NE Hassalo St and NE Holladay St as noted previously.
- Action: The formal amendment adds the new child project to the parent Rise Quarter Improvement project in Key 19071 to complete the required stormwater facility upgrades.



- **New Child Project - Key 23672 - I-5 Rose Quarter: Broadway to Weidler Phase 1 (ODOT):**
 - Lead Agency: ODOT.
 - Description: The project is located on I-5 from MP 301.40 to MP 303.20 in Portland. It will replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project Key 19071 I-5 Rose Quarter Improvement Project.
 - Funding Summary: Funding for this packaged segment originates from the new NAE grant. A total \$382,250,000 of the \$450 million total grant is being programmed to complete this segment. Only the construction phase is needed to be programmed. Added: The NAE is 100% federal funds. There is no match requirement.
 - Action: The formal amendment will add Key 23672 to the MTIP and STIP as a child project to the parent Rose Quarter project in Key 19071.



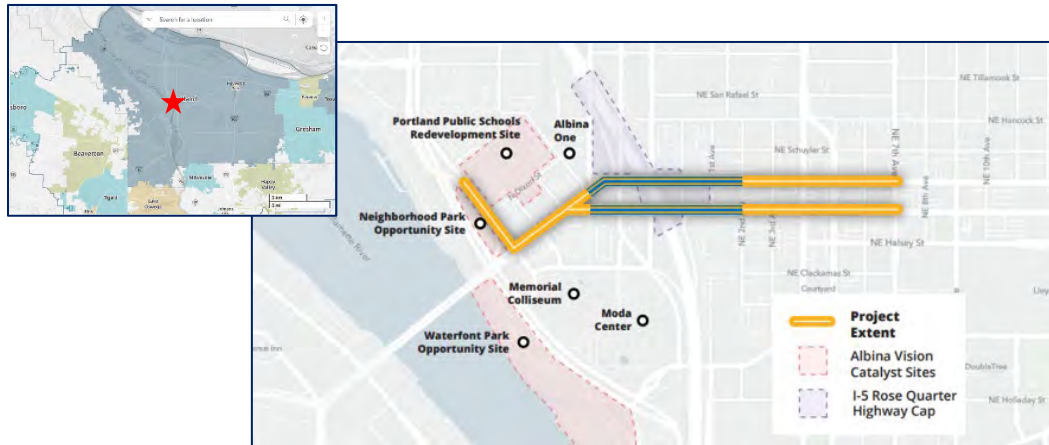
Additional Projects Included in the July 2024 Rose Quarter Improvement Project MTIP Formal Amendment bundle:

- **New Project Key 23646 - Broadway Main Street and Supporting Connections (Portland):**
 - Why it is Included: TPAC has already approved the new project to proceed to JPACT last month as part of the June 2024 MTIP Formal Amendment bundle. However, JPACT has requested a formal presentation about the Rose Quarter Improvement project from ODOT during their July 18, 2024 meeting. Due to the improvement connection Portland's project has with the overall Rose Quarter Improvement Project, Portland requested adding their project to the July #2 MTIP Formal Amendment bundle to enable both agencies to answer questions together about their delivery relationship. Both agencies believe this processing approach will reduce potential confusion about both projects by processing them together in the same bundle.

Portland's new Broadway Main Street and Supporting Connections in Key 23646 will process through JPACT and Metro Council with a final requested approval from FHWA as part of the July #2, 2024, Rose Quarter MTIP Formal Amendment bundle. There is no direct action for TPAC to take with this project. TPAC provided their approval recommendation to JPACT last month. The project details are included as part of this staff report for information purposes. It will be included as part of the formal amendment approval motion for JPACT and Metro Council.
 - Lead Agency: Portland.
 - Description: The project will include enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services. Upgraded and protected lanes for biking and scooting. Restoration of managed on-street parking and loading. Additional tree canopy, green infrastructure, street lighting, and other streetscape amenities. Placemaking opportunities to honor the district's history through public art, street activation, and monumentation. Project will result in greater access and connectivity to Portland's Lower Albina neighborhood.
 - Funding Summary: The project also successfully secured a \$38,394,000 NAE discretionary grant from USDOT for the project. The NAE is 100% federal funds. There is no match requirement. Although the project has a delivery connection to the Rose Quarter Improvement Project, it is considered a separate and stand-alone project that Portland will deliver.
 - Action: The formal amendment adds Key 23646, Broadway Main Street and Supporting Connections, to the MTIP and STIP as a stand-alone project, but

will process it along with the Rose Quarter Improvement Project amendment bundle through JPACT and Metro Council.

○



RCN FY23 Awards Factsheet

Broadway Main Street and Supporting Connections

Portland, Oregon

Grant Type: Construction

Funding Source: NAE

Award: \$38,394,000

Estimated Total Project Cost: \$38,394,000

Project Summary:

The Broadway Main Street & Supporting Neighborhood Connections Project will construct multimodal safety and streetscape improvements N/NE Broadway and N/NE Weidler St, two arterials that make up a wide, high-volume couplet that serves as the primary connection across Interstate 5 (I-5) in inner North/Northeast Portland, Oregon and as the neighborhood’s gateway to downtown.

The project improves access and connectivity and foster equitable development and restoration in the heart of the city’s historic Black neighborhood, Lower Albina. Located in an underserved community designated as both historically disadvantaged and an area of persistent poverty, the project is designed to support realization of the community’s vision for the area.

This project will reconnect Lower Albina to neighborhoods and key destinations across I-5, a major grade separated facility that divided the neighborhood and displaced hundreds of residents when it was constructed. It will also improve connections within the community itself across N Broadway, the widest street in Portland’s Central City, and the N/NE Broadway/Weidler couplet, making those busy streets more welcoming to current and future residents, employees, and visitors of the area.

I-5 Rose Quarter Improvement Project MTIP Formal Amendment Bundle Summary:

Key	Name	Action	Funding
19071 (Parent)	I-5 Rose Quarter Improvement Project	Update PE, ROW, and add UR & <u>Other</u> phase	Add \$67,750,000 of NAE grant funds
21219	I-5 Over NE Hassalo St and NE Holladay St (Portland)	Cancel project and transfer to Key 23682	Reprogram \$5 million to Key 23682
23682 (Child)	I-405 and I-5 Stormwater Facilities	Add new Stormwater Facilities project	Add \$5 million from Key 21219
23672 (Child)	I-5 Rose Quarter: Broadway to Weidler Phase 1	Add new child construction phase project	Add \$382,250,000 of NAE grant funds
23646 (Related)	Broadway Main Street and Supporting Connections	Add new project to Rose Quarter bundle	Add \$38,394,000 of NEA grant funds to the MTIP

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 fiscal constraint.
- 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 included in transportation demand modeling for performance analysis.
- 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 July #2 FFY 2024 Formal MTIP amendment (JL24-11-JUL2) will include the following actions:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	June 12, 2024
• TPAC agenda mail-out.....	July 5, 2024
• TPAC approval recommendation to JPACT.....	July 12, 2024
• Completion of public notification process.....	July 12, 2024
• JPACT approval and recommendation to Council.....	July 18, 2024
• Metro Council approval.....	August 1, 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.....	August 6, 2024
• USDOT clarification and final amendment approval.....	Late August 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 23-5335 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 new projects to be added into the MTIP and STIP. Follow-on fund obligation and expenditure actions can then occur to meet required federal delivery requirements.
 4. **Metro Budget Impacts:** There are no direct or indirect impacts to the approved Metro budget through the actions of this amendment. The identified funding for the new projects does not originate from Metro.

RECOMMENDED ACTION:

JPACT met on July 18, 2024 and are anticipated will approve Resolution 24-5424 and provide Metro Council a final approval recommendation for Resolution 24-5424 to complete the required updates and changes to the I-5 Rose Quarter Improvement Project amendment bundle.

Three attachments:

- Attachment 1: Rose Quarter General Fact Sheet
- Attachment 2: Rose Quarter Project FAQs
- Attachment 3: No More Freeways Comments Letter.

PROJECT FACT SHEET

PROJECT OVERVIEW

The purpose of the I-5 Rose Quarter Improvement Project is to improve safety and congestion where three major interstates converge and to reconnect the Albina neighborhood by constructing a highway cover over a portion of I-5.

Project benefits include improving safety and mobility on local streets, creating new space for community development and developing a diverse and skilled workforce. Some of the key project improvements include:

- ▶ **New ramp-to-ramp auxiliary lanes and wider shoulders** on I-5 to improve safety and reduce congestion at the state's top traffic bottleneck.
- ▶ **A highway cover over I-5** that reconnects local streets and creates new community spaces on top for future development and economic opportunities.
- ▶ **Relocation of the I-5 southbound off-ramp** from Broadway/Vancouver to the south, connecting with NE Williams Avenue and NE Weidler Street.
- ▶ **Local street improvements** including wider paths, accessible curb ramps, better lighting and protected bike lanes for people walking, biking, and rolling.
- ▶ **A pedestrian and bicycle bridge** that creates a new path over I-5 to connect with the walking and biking network.
- ▶ **A new east-west roadway crossing over I-5** that reconnects Hancock Street, adding another crossing north of Broadway/Weidler.

PROJECT SCHEDULE



Note: The project schedule is subject to change.

January 2024

PROJECT VALUES



Restorative Justice: Accelerate social, racial and economic equity, sustaining positive tangible change specifically for Portland's Black community.



Community Input and Transparent Decision-Making: Have community-informed and involved decision-making through a community-connected, transparent and inclusionary process.



Mobility Focus: Increase connectivity for the traveling public and local community.



Climate Action and Improved Public Health: Reduce greenhouse gas emissions and meet local, regional and statewide climate action goals.

WHAT IS A HIGHWAY COVER?

A highway cover is a structure built over a highway (like a very wide bridge) that will reconnect local streets and create new community spaces for future development and economic opportunities. Depending on the final design, the cover will be able to support buildings from three to six stories tall. When standing on the highway cover, you won't see much of I-5 since traffic will be below it.

Please note that this graphic is for illustrative purposes only and does not represent a final design; the highway cover development process will be led by the City of Portland, in partnership with ODOT, with community involvement.



HISTORIC ALBINA ADVISORY BOARD

The purpose of the Historic Albina Advisory Board is to elevate voices in the Black community to ensure that project outcomes reflect community interests and values and that historic Albina directly benefits from the investments of this project.

The Board brings community perspectives into the project's decision-making process concerning elements that most directly support community connections, urban design and wealth generation in the Black and historic Albina community.

Historic Albina Advisory Board meetings are open to the public. For more details, visit <https://i5rosequarter.org/events-meetings/>

PROJECT PRIORITIES AND NEXT STEPS

At this time, funding for project construction is not available. The project team is continuing to prepare for future funding opportunities needed to complete the project design and begin construction.

With available funding, ODOT will focus on advancing project design to ready the project for construction, including positioning for funding opportunities, collaborating with the community and project partners to develop a plan for the highway cover, and completing the environmental process.

To inform these priorities, ODOT is working closely with the Historic Albina Advisory Board and partners to provide insight and recommendations, and to advance and fund the project.

Do you have questions or ideas you want to share? **We want to hear from you!**

Text us at **503-470-3127**

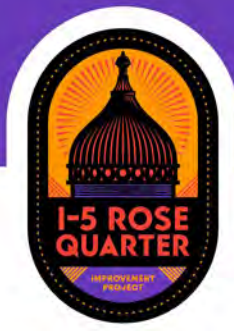
Email us at **i5rosequarter@odot.oregon.gov**



Scan the QR code with your smart phone or tablet to visit us at **i5rosequarter.org**

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PROJECT FAQs

1. **What is the I-5 Rose Quarter Improvement Project?**

The purpose of the I-5 Rose Quarter Improvement Project (Project) is to improve safety and congestion where three major interstates converge and to support reconnecting the Albina neighborhood through the construction of a highway cover over a portion of I-5. Project benefits include improving safety and mobility on local streets, creating new space for community development and developing a diverse and skilled workforce.

This 1.8-mile stretch of highway is the only two-lane section of I-5 in a major urban area between Canada and Mexico. It has the highest crash rate on any urban interstate in Oregon and is the state's top traffic bottleneck. The Project addresses the critical need to keep Oregon's people and economy moving.

2. **Where is the Project located?**

The project area centers around a stretch of I-5 just east of the Willamette River. Three major interstates come together here: I-5, I-84 and I-405. The project area sits within the Eliot and Lloyd District neighborhoods.

The project area also sits in the heart of the historic Albina neighborhood. Albina was a thriving community and business district for Black Portlanders until several major urban renewal and development projects, including the construction of I-5, severed and displaced the community. Because past public and private development decisions in the historic Albina neighborhood so negatively impacted Black Portlanders, ODOT is committed to engaging with and prioritizing the voices of the historic Albina community.

3. **Why is improving the project area so important to the traveling public?**

I-5 is the main north-south highway along the U.S. West Coast and is critical for moving people and goods and connecting cities and towns from Mexico to Canada. The surrounding local streets provide access to services and transportation options, such as the Moda Center, Oregon Convention Center, Rose Quarter Transit Center and the Broadway/Weidler bike corridor and are essential to how local residents get around. The Project addresses the following concerns:

- The top traffic bottleneck in Oregon and the 28th worst freight bottleneck in the nation.
- Some of the highest traffic volumes in the state of Oregon, with up to 12 hours of congestion each day.
- A key contributor to Portland's 2022 ranking as the 12th most congested city in the United States and the 37th most congested city worldwide.
- A crash rate 3.5 times higher than the statewide average on I-5.
- A lack of full shoulders in key areas of I-5 to clear crashes and to provide emergency vehicles access or movement through traffic.
- A lack of neighborhood connections and undersized, incomplete and inaccessible sidewalks and crossings for people walking, biking and rolling through the surrounding local streets.

4. What are the Project's values?

ODOT acknowledges the impact and harm caused to the historic Albina community by the initial construction of I-5. We are committed to supporting a safer and more equitable project for Albina. The Project will enhance and improve travel, community spaces and community connections while supporting opportunities for economic development, including future land redevelopment opportunities. The Project's values are:

- **Restorative Justice for the Albina Community** to accelerate social, racial and economic equity that sustains positive, tangible change, specifically for Portland's Black community.
- **Community Input and Transparent Decision-Making** to have community-informed and involved decision-making through a community-connected, transparent and inclusionary process.
- **Mobility Focus** to increase connectivity for the traveling public and local community.
- **Climate Action and Improved Public Health** to reduce greenhouse gas emissions and meet local, regional and statewide climate action goals.

5. What are the key elements of the project design?

- **New ramp-to-ramp connections (auxiliary lanes)** in each direction of I-5 between I-84 and I-405. Auxiliary lanes will reduce congestion at the state's top bottleneck. An estimated one-third of traffic will be able to stay on these ramp-to-ramp connections to travel between interstates instead of merging and causing congestion and safety issues.

- **Wider shoulders** in each direction of I-5 between I-84 and I-405, providing space for stalled vehicles to move out of traffic and for emergency vehicles to respond to emergencies more quickly and safely.
- **A highway cover** over I-5 that will reconnect local streets and create new community spaces on top for future development and economic opportunities.
- **A new east-west roadway crossing** over I-5 that reconnects Hancock Street, adding another crossing north of Broadway/Weidler.
- **A car-free pedestrian and bicycle bridge** that creates a new path over I-5, connecting with the local walking and biking network.
- **Multimodal local street improvements** including wider paths, curb ramps that are accessible in accordance with the Americans with Disabilities Act (ADA), and better lighting for people walking, biking and rolling.
- **Relocation of the I-5 southbound off-ramp** from Vancouver/Broadway to the south, connecting with NE Williams Avenue and NE Weidler Street.

6. What are the project benefits?

Expected project benefits include:

- Providing smoother traffic flow on I-5 through ramp-to-ramp connections and wider shoulders.
- Enabling faster emergency response times by allowing responders to use wider shoulders to move through traffic.
- Reducing frequent crashes on I-5 by up to 50%.
- Saving travelers on I-5 nearly 2.5 million hours of travel time each year, getting people, goods and freight through this section of I-5 more quickly.
- Restoring neighborhood street connections over I-5.
- Creating opportunities for Disadvantaged Business Enterprises through contracts that build long-term career prospects for small businesses.
- Adding more than 1.5 miles of local street improvements to make streets safer by offering greater visibility, protection and access to people walking, biking and rolling.
- Designing and building a highway cover that can accommodate new community development.

7. What is the highway cover?

A highway cover is a structure built over a highway, similar to a very wide bridge. By replacing the existing bridges with one continuous highway cover, new land over I-5 that doesn't currently exist will be available for community development. In addition, the new cover will include seismic upgrades, making it more resilient than the existing bridges in the event of an earthquake.

The Proposed Hybrid 3 Cover Concept is the highway cover design that the community recommended after the evaluation of multiple highway cover options through an Independent Cover Assessment review in 2020 and 2021. The proposed design will connect streets that are currently divided by I-5. The new land created over I-5 will allow for wide sidewalks and the potential for future land development opportunities.

Design for the Project's Main Construction Package, which includes the highway cover, will be determined through a public process in partnership with the City of Portland and ODOT. The process includes the development of preferred opening-day and longer-term development concepts, street and path design, and options for governance and financing, followed by the formation of a Community Framework Agreement to guide future development of the highway cover. The process of designing the highway cover uses will continue to seek input from the Black and historic Albina community through guidance from the Project's Historic Albina Advisory Board.

8. How will auxiliary lanes and wider shoulders improve safety on I-5?

New ramp-to-ramp connections (auxiliary lanes) are designed to separate slower vehicles entering and exiting I-5 from higher-speed vehicles using the through lanes. Auxiliary lanes are proven to increase safety by providing drivers more time to merge, which reduces rear-end and sideswipe crashes. Studies show the new ramp-to-ramp connections are expected to reduce the frequency of crashes by up to 50%.

The Project will also build wider shoulders along I-5 between I-84 and I-405, which will provide space for vehicles to get safely off the roadway and give emergency vehicles safer and quicker access to emergencies within and beyond the Rose Quarter area.

Projects around the United States and other completed projects in the Portland area have proven the benefits of adding auxiliary lanes. A project in Tualatin added a single southbound auxiliary lane on I-5 from north of Lower Boones Ferry Road to I-205 to relieve congestion and reduce crashes. Results have shown that the auxiliary lane has reduced merging conflicts and allowed a more direct connection for people traveling from OR 217 to I-205. It has improved trip reliability during evening peak traffic by 16 minutes;

decreased crashes per year by 29%; and saved drivers \$13.8 million worth of time¹ annually.

A similar project in east Portland added an auxiliary lane on I-205 southbound, connecting the I-84 eastbound on-ramp to the SE Division Street/SE Powell Boulevard off-ramp. Between 2017 and 2019, this project decreased congestion over a 6-mile stretch by 35% and saved drivers \$3 million worth of time annually.

[Watch this video](#) to learn more about how auxiliary lanes work.

9. How will the Project improve safety for non-motorists?

Local street improvements will make streets safer by offering greater visibility, protection and access to people walking, biking and rolling. The Project includes improvements on local streets for all users, such as better lighting and ADA-compliant curb ramps. The Project will improve bike facilities and replace existing bike lanes with either buffered or protected lanes. The addition of a car-free bridge over I-5 will enhance safety and improve access for pedestrians and bicyclists near the Moda Center.

10. Will the Project increase the number of lanes on I-5? Will it expand the highway?

The Project is not a massive highway expansion project. It does not add new through lanes. At specific areas along the state's worst highway bottleneck, the Project will add new auxiliary lanes, which serve as ramp-to-ramp connections, and expand the existing highway shoulders along I-5. While these improvements will increase the paved width of the highway, the auxiliary lanes are designed to separate slower vehicles entering and exiting the highway from the higher-speed through traffic using the existing through lanes.

The new auxiliary lanes are projected to reduce congestion and improve safety on I-5 in our growing community. As an example for how they will function, let's look at how the traffic is currently moving during morning and evening rush hour. During peak morning and evening traffic, more than 95% of vehicles that enter I-5 southbound from the I-405 Fremont Bridge go on to exit the interstate within 2 miles, either at Broadway, I-84 or the

¹ Driver time saved is calculated in the following way: Daily Cost of Delay = (total daily vehicle delay in hours * passenger vehicle % * \$26.44 per hour) + (total daily vehicle delay in hours * heavy truck % * \$33.24 per hour).

The daily cost of travel time for each vehicle type is based on a published ODOT report on the value of travel time, which can be found here: <https://www.oregon.gov/ODOT/Data/Documents/2017-The-Value-of-Travel-Time.pdf>.

Annual Cost of Delay = Daily Cost of Delay * 250 days (250 days represent the average non-holiday weekdays in a year).

To learn more, read the 2020 Traffic Performance Report:

<https://www.oregon.gov/odot/Projects/Project%20Documents/TPR-2020.pdf>.

Morrison Bridge.² These three exits are all within the project area. With the proposed ramp-to-ramp connections, vehicles coming from the I-405 Fremont Bridge and going to one of these three exits can use the new auxiliary lane and will not have to merge in and out of through traffic on I-5. The Project is projected to save travelers on I-5 about 2.5 million hours of travel time each year.

The wider highway shoulders will provide space for vehicles to safely exit the roadway in an emergency. There are areas on I-5 within the project footprint that currently lack these shoulders. The wider shoulders will also give emergency service vehicles safer and quicker access to emergencies. These improvements will widen the physical footprint of I-5 without adding more through-travel lanes and will be built primarily within existing ODOT right-of-way.

11. What is the status of the Project's environmental review process?

The National Environmental Policy Act (NEPA) is a federal law requiring agencies seeking federal funding or approval to assess the potential impacts of their projects on the natural, human and built environments, including impacts on things such as air quality, traffic, historic resources, communities and more. Depending on the level of expected impact from a project, agencies must document a Categorical Exclusion, Environmental Assessment (EA) or Environmental Impact Statement.

In accordance with the NEPA, ODOT prepared and published an EA in 2019, and a Supplemental EA in 2022. Both times, the process included an opportunity for the public to review the findings and comment on the analysis. Most recently, the project team made design refinements to address public comments received during the Supplemental EA comment period, including two new structures over I-5. The first is the pedestrian and bicycle bridge that will connect the east and west sides of NE Clackamas Street. The second is a new southbound flyover structure that will split eastbound and westbound traffic exiting I-5. The refinements were made in partnership with the City of Portland, the Historic Albina Advisory Board and other key community partners.

ODOT will release a Revised Supplemental EA, including details on the design refinements, for review by the Federal Highway Administration (FHWA). As part of the NEPA process, the FHWA reviews all findings and public comments before making an environmental decision on a project. FHWA's decision is expected in 2024.

12. How is the Project addressing climate change?

Transportation emissions are Oregon's largest single source of greenhouse gas emissions. Other top sources of emissions are: heating our homes and businesses, residential and commercial construction, and agriculture. Not in isolation, but together with other projects

² Metro Regional Travel Demand Models, 2015. Learn more about Metro's modeling services: <https://www.oregonmetro.gov/modeling-services>.

overseen by ODOT's Urban Mobility Office and other partners, the I-5 Rose Quarter Improvement Project supports a region-wide Urban Mobility Strategy³ and regional policy that addresses statewide goals for reducing emissions. As such, greenhouse gas levels related to the Project should be considered in the context of the state's overall emission reduction plan.

Federal, state and local strategies are expected to reduce transportation sector greenhouse gas emissions through better fuel economy standards, inspection and maintenance programs, and transition to cleaner, low-carbon fuels for motor vehicles, including the electrification of vehicle fleets. Oregon is also investing millions of dollars to support electric vehicle charging infrastructure along the West Coast Electric Highway.⁴ On December 19, 2022, Oregon policymakers, joining California and Washington, approved a rule that will ban the sale of new gasoline-powered passenger vehicles by 2035. The effort comes as Oregon aims to cut climate-warming emissions by 50% by 2035 and by 90% by 2050. As a result of these regulatory efforts, large decreases in emissions are expected.

13. How is ODOT addressing the concerns and needs of the historic Albina community?

In Portland, generations of Black families are still being impacted by the lasting harm caused by the original construction of I-5 in the 1950s and 1960s, which resulted in the loss of homes, businesses, community places and generational wealth creation. It's important to acknowledge this painful history as ODOT puts a renewed focus on the historic Albina community through the I-5 Rose Quarter Improvement Project.

The Project presents a significant opportunity to contribute to Portland's Black community – first, by acknowledging these past harms and delivering a project that is not only influenced by Black voices, but intentionally invests in Black and minority-owned companies and workers. From consultants and vendors, community groups and non-profits, to new operational and institutional practices, ODOT is prioritizing equity and ensuring Black voices have a seat at the center of the table.

We can't replace what once was in Albina, but we can ensure we do not repeat past harms and be a national model for how a transportation project can invest in people. That means fostering economic empowerment, self-sufficiency and wealth creation opportunities for the Black community through good-paying jobs and pathways to entrepreneurship.

³ The [Urban Mobility Office](#) oversees ODOT's Urban Mobility Strategy – a cohesive approach to making everyday travel safer, easier and more predictable in the Portland metropolitan area.

⁴ The West Coast Electric Highway is an extensive network of public electric vehicle DC fast-charging and Level 2 charging stations along the West Coast, from British Columbia to the California-Mexico border. Charging stations are located every 25 to 50 miles along I-5, U.S. Highway 101, and other major roadways in British Columbia, Washington, Oregon and California.

14. How will the Project impact Harriet Tubman Middle School?

ODOT stands by its commitment to work collaboratively with Portland Public Schools (PPS) and will continue to keep the school district apprised of the latest data and developments regarding the Project.

PPS is leading a separate effort to relocate Harriet Tubman Middle School to a new location in the area and away from the I-5 corridor. This move is not as a result of the I-5 Rose Quarter Improvement Project and came about because \$120 million in funding for relocating the school was approved by the state legislature. PPS is exploring possible new locations and has the latest information. While ODOT is not directly involved in this effort, we support PPS's process to address concerns related to the school being adjacent to I-5.

15. How is ODOT ensuring that contract and workforce opportunities are equitable?

For the first time in ODOT's history, the agency is applying a diversity plan to a mega-project. From capacity building to a mentor-protege program and anti-harassment policies, the Project's [Diversity and Subcontracting Plan](#) includes strategies to boost contracting opportunities for Disadvantaged Business Enterprises (DBEs) and expand a diverse workforce. With guidance from the Project's Community Oversight Advisory Committee, this diversity plan was adopted in February 2022.

With more than 2 million labor hours and up to \$150 million in payroll and benefits, the Project offers career pathways and employment opportunities within the trades and in construction-related fields. It also presents capacity-building opportunities and large project experience for businesses with small cash flow and/or little to no experience working on major infrastructure projects. There are three to five Mini Construction Manager/General Contractor (Mini CM/GC) work packages for DBEs, where they will receive mentorship, training and business development support. Long-term projects like the I-5 Rose Quarter Improvement Project offer career stability and opportunities to learn new skills. Learn more about the CM/GC process by viewing this [fact sheet](#).

16. How are advisory committees shaping the Project?

Advisory committees oversee and provide recommendations for the Project's design and engagement process. Committee members' expertise reflects diverse professional backgrounds, including minority-owned firms, advocacy groups, workforce development organizations, industry associations and community-based organizations. Members are leaders and volunteers with strong ties to the historic Albina community and have a wide variety of civic and community interests. All members are recognized for advocating for people, particularly people of color and other diverse groups.

The purpose of the [Historic Albina Advisory Board](#) (HAAB) is to elevate voices in the Black community to ensure that project outcomes reflect community interests and values, and that the community directly benefits from the investments of this Project. The Board brings community perspectives to the Project's decision-making process concerning elements that most directly support community connections, urban design and wealth generation in the Black and historic Albina community.

- HAAB members are deeply involved in the design process for the Project's Main Construction Package, which includes the highway cover. The highway cover design work includes designing the cover structure across I-5, as well as what will ultimately be developed on top. ODOT is leading the process to design the highway cover structure and preferred opening-day uses. The City of Portland is leading the public process to define what will be developed on top of the cover in the long-term, which includes the development of preferred longer-term development concepts, street and path design, and options for governance and financing, followed by the formation of a Community Framework Agreement to guide future development. We'll be leaning into existing partnerships to leverage the most success in reconnecting communities.

The [Community Oversight Advisory Committee](#) (COAC) ensures the construction contractor meets its community and project goals and expectations for contracting with [disadvantaged businesses](#) and employing minorities and women. COAC members bring a broad perspective on community, social, economic and workforce issues in the project area. The committee last met in January 2023 and will resume a regular meeting schedule when construction on the project begins.

17. How much is the Project expected to cost and how will it be funded?

Project cost estimates have increased from a previous estimate in September 2021. The current cost estimate is \$1.5 billion to \$1.9 billion. These figures may be updated in the future. The increase is a result of multiple factors:

- Design refinements and the associated construction material cost:
 - » In response to public comments made during the Supplemental EA, the project team made additional design refinements, including two new structures over I-5. The first is the pedestrian and bicycle bridge that will connect the east and west sides of NE Clackamas Street. The second is a new southbound flyover structure that will split eastbound and westbound traffic exiting I-5.
- Enhanced understanding of design and constructability based on input from the Project's CM/GC.
- Effects of inflation due to project delay.
- Ongoing supply chain effects affecting labor and materials.

Multiple sources of funding are anticipated for project construction, including funds from:

- Grant opportunities.
- Oregon House Bill 2017.
- Net revenues from the Oregon Toll Program, including the Regional Mobility Pricing Project.
- Other federal, state, regional and local funding sources.

18. How does the delay in tolling impact the Project and what happens next?

On June 26, 2023, ODOT released a draft Urban Mobility Strategy [Finance Plan](#). The plan confirms funding for the following Project priorities:

- Completing the environmental review process.
- Advancing design for Early Work Packages A and B to 100%.
- Advancing Early Work Package C toward final design.
- Advancing the Main Construction Package to 30% design.

The project team will focus on these priorities, ways to finance the Project and preparing for construction. ODOT is actively applying for federal grants and other funding opportunities.

19. Want to learn more?

If you'd like to learn more about the Project, you can send your questions to the project team (see contact options below). Stay informed about opportunities to provide input by signing up for our mailing list and checking the Project's Events and Meetings page for updates.

- **Website:** i5rosequarter.org
- **Email:** i5rosequarter@odot.oregon.gov
- **Phone:** 503-470-3127
- **Mailing List:** i5rosequarter.org/contact



Date: July 10, 2024

To: Metro Council
Joint Policy Advisory Committee on Transportation (JPACT)
Transportation Policy Alternatives Committee (TPAC)

From: Joe Cortright, *City Observatory*
Chris Smith, No More Freeways

Subject: **Comments on MTIP FFY 2024 Formal Amendment Bundle for Resolution 24-5424**

“Some highway engineers have a mentality ... that would run an eight-lane freeway through the Taj Mahal. That is our problem.”
– Oregon Governor Tom McCall, 1970

We appreciate the time that Metro staff has provided to help us carefully understand this amendment bundle. We have several important perspectives to share on these MTIP items.

We note the significance of programming the highway covers in a separate construction phase.

As Metro staff has explained to us, the use of a separate phase indicates that the multiple phases have ‘independent utility’. While they may be closely connected each could be constructed without the other. We continue to believe that the optimal outcome for the community would be to cap I-5 at Rose Quarter without widening the freeway, instead seeking less costly methods to address operational issues. We suggest that congestion pricing, coupled with some of the more modest investments (e.g., shoulder widening) suggested in the ARUP reports¹ would be the best outcome.

We join the community in celebrating the Reconnecting Communities grants to both the highway covers at Rose Quarter and to the City of Portland Broadway Main Street project.

¹ International traffic engineering firm ARUP was commissioned to review the Rose Quarter project as part of the Independent Cover Assessment. The result was two appendices that review the design and analyze its constructability. While the design has changed since, the fundamental suggestions to achieve desired goals less expensively are still relevant:

I-5 Rose Quarter Freeway Expansion Project: Appendix E: Technical Design Review Memo, ARUP, December 11, 2020.

https://nomorefreewayspx.com/wp-content/uploads/2024/07/20201211-Appendix-E-Technical-Design-Assessment_Accessible.pdf

I-5 Rose Quarter Freeway Expansion Project: Appendix I: Cost and Constructability. ARUP. July 21, 2021.

https://www.i5rosequarter.org/pdfs/independent_cover_assessment/AppendixI_CostAndConstructability.pdf



However, we do request one modification of the programming of the Reconnecting Communities funds. The current bundle would allocate \$382M to the covers and \$30M to Right of Way. We believe that Right of Way should not be prioritized until funding of the highway widening program is fully secured - constructing covers over a narrower footprint would certainly be more cost effective.

We request that the \$30M ROW allocation be allocated instead to the covers, raising the covers allocation to \$412M.

We observe the divergent levels of support for the covers and widening programs.

The highway covers enjoy widespread community support, including enthusiastic support from our organization. It is also possible that if an INFRA grant is awarded, the covers could be fully funded, with almost 90% of the funding coming from Federal sources.

In contrast, the widening project remains extremely controversial in the community, including multiple lawsuits from ourselves and our co-plaintiff organizational partners. Even if a full INFRA grant award is made, there will still be a significant gap that will need to be covered locally, and this cannot help but impact other priorities in our region. We have already seen the Oregon Transportation Commission defer maintenance on the Fremont Bridge and an important bridge project in North Portland to identify the local match for the INFRA application.² Political leadership to direct ODOT to rightsize the Rose Quarter megaproject will ensure this proposed expansion's spiraling cost overruns don't jeopardize regional efforts to lobby the state legislature in pursuit of new revenue for greater investment in local road maintenance, safer streets and public transit in the transportation package expected in the 2025 legislative session.

We urge regional leaders to carefully track the risks and impacts attendant to the Rose Quarter Freeway Expansion component. We continue to believe the impacts are greater than the benefits, and any temporary benefits will be rapidly erased by induced demand. Our community - and the new portions of the community that will soon span the highway at Albina - deserve better.

² "Desperate for freeway funds, transportation commission mulls all bad options" *BikePortland*. May 10, 2024. <https://bikeportland.org/2024/05/10/desperate-for-freeway-funds-transportation-commission-mulls-more-debt-active-transportation-project-delays-386241>

Update on Employee Engagement at Metro
Other Business

Metro Council Meeting
Thursday August 1st, 2024

[STAFF REPORT FOR USE FOR WORK SESSIONS AND COUNCIL MEETINGS]

UPDATE ON METRO'S EMPLOYEE ENGAGEMENT WORK INCLUDING THE 2023 EMPLOYEE ENGAGEMENT SURVEY

Date: July 15, 2024
Department: Council/ COO
Meeting Date: August 1, 2024

Presenter(s), (if applicable):
Kayla Martin (she/her), Project Manager,
Office of the COO
Holly Calhoun (she/her), Deputy Chief
Operating Officer

Prepared by: Kayla Martin,
Kayla.Martin@oregonmetro.gov

Length: 20 mins

ISSUE STATEMENT

There are many ways in which a Metro employee can experience and engage with the workplace around them. This appears in the way we support employee-supervisor relationships, how projects teams show up in collaborative spaces, the way we are informed on the latest Metro news, benefits provided to employees, opportunities for professional development and growth, employee recognition, and so much more.

The way we experience and engage in our workplaces through employee engagement and experience is rooted in welcoming, belonging, and safe spaces for all employees. If we can best understand the needs of all Metro employees, we can strive towards creating a trusting and supportive workplace and culture that allows employees to feel engaged and connected to Metro and the work we do.

ACTION REQUESTED

To provide an update to Council on the status of Metro's work on Employee Engagement and high-level review of Metro's 2023 Employee Engagement Survey.

IDENTIFIED OUTCOMES

- Increased awareness and knowledge of Metro Council on the work planning and processes being developed to address employee engagement.
- Create space for Metro Council to ask questions and learn more.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

By understanding the experiences of Metro employees and their needs in the workplace, we can better support the work led by Metro employees. Ensuring employees know what is expected of them, can do their best every day, have the materials and equipment to do the

work they do and are recognized in that work, aims to create a space for Metro employees to uphold Metro's values towards racial justice, climate justice and resilience, and shared prosperity.

Current project governance is made up of both an Executive Employee Engagement Team and Project Team. The Executive Employee Engagement Team consists of our COO Executive Team, HR Director, DEI Director, and CAM Director. This team provides strategic leadership guidance and executive direction towards planning and implementation of the work. The Project Team consists of an Executive Sponsor and project manager from the Office of the COO, and representatives from HR, DEI, and Employee Communications. This team supports implementation of our growing work on employee engagement and experience, and implementing process improvements to project systems and structure.

BACKGROUND

Every other year, Metro administers an employee engagement survey to capture Gallup Q12 employee engagement questions, DEI Agreement, Reporting Confidence means, and open-ended responses. Survey data informs areas of growth and improvement for Metro when it comes to supporting the experiences of all employees. Historical data and trends can be compared to when Metro first launched the employee engagement survey in 2017. However, the goal of the employee engagement survey is to go beyond simply being a survey but opens a conversation where we can learn more about all Metro employees and their needs.

For this past survey iteration, the project team has largely focused efforts on process improvements aimed at better standardizing, consistent efforts to address survey findings. Currently, the project operates on two main approaches at the department-level and organizational-level.

The department-level approach ensured all departments received department-specific survey data reports in addition to the agency-wide report, and were provided access to connect with Lexicon & Line to best understand insights from their reports through data sessions. To encourage departments to address the findings found in their department-specific reports, all departments submitted at minimum one department goal aimed towards employee engagement and 2-3 actions to meet the identified goal. We are currently in process of identifying a process for tracking and reporting to ensure departments are accountable to reaching their goals.

The organizational approach ensures we identify actions that address the four overarching themes identified in the agency-wide report related to providing increased opportunities for connection and engagement, "staying the course" for professional development and growth opportunities, and better understanding the experiences of our most impacted employee groups including onsite, remote/hybrid, variable hour, BIPOC, and LGBTQ+. Processes and actions to address the organizational themes are currently being identified.

ATTACHMENTS

- Is legislation required for Council action? Yes No
- If yes, is draft legislation attached? Yes No
- What other materials are you presenting today?
 - 2023 Metro Employee Engagement Survey Data Report – Full survey data report developed by Lexicon and Line. This survey report has been shared with all Metro employees.
 - 2023 Quick Survey Data Highlights and Themes- Two-page document to quickly summarize key survey findings and themes.
 - Update on Metro’s Employee Engagement PowerPoint Presentation

OREGON METRO | 2023 EMPLOYEE ENGAGEMENT SURVEY HIGHLIGHTS

INTRODUCTION

The Employee Engagement Project Team made up of representatives from HR, DEI, Employee Communications, and the Office of the COO conducted a 2023 Employee Engagement Survey with collection support from Gallup and data analysis by Lexicon & Line. The 2023 Metro Employee Engagement Survey was completed by 920 employees reaching a 68% participation rate. The survey was open to participants over the course of 2 weeks with 42 questions total.

SURVEY DATA HIGHLIGHTS

- Metro's overall Q12 Employee Engagement Score showed an increase from 3.83 (2021) to 3.92 (2023).
- Q12 categories with notable increases from 2021 include categories of Opportunity to do my Best, Development, Progress, and Learn and Grow.
- Demographics that saw an increase in overall Q12 mean scores include employees who identify as women, asexual, pansexual, regular/part time, and VHE less than 600 hours. Decreases were seen amongst employees who identify as non-binary, genderqueer or third gender, and employees who selected "sexuality not listed".
- Significant overall Q12 mean score increases of 0.1 or more were found amongst all racial and ethnic demographics, with the exception of Black or African American employees where there was no significant change.
- It should be noted that engagement looks different for each employee group and may require tailored approaches to address the needs of different employees across the organization.

KEY THEMES

Theme 1: Need for increased opportunities for employee interactions and engagement.

The analysis of qualitative responses from the survey found suggestions to improve workplace culture (15% to 20.6%), a need for Metro to demonstrate more unity and less division (1.2% to 17.8%), and a desire for more interaction with events and activities (15% to 19.5%).

Percentages reflect the number of participants who mentioned such comments.

Notably, 1 in 4 BIPOC employees desired more interaction with events and activities when compared to all Metro groups suggesting lower engagement scores.

Theme 2: The data show unique findings for three key groups: remote/hybrid employees, onsite employees, and variable hour employees.

Survey findings described how remote and hybrid employees are highly engaged when compared to on-site employees.

- On-site employee engagement increased from 3.59 (2021) to 3.74 (2023), remote employees increased from 4.01 (2021) to 4.16 (2023), hybrid employees increased from 3.71 (2021) to 4.02 (2023), and variable-hours employees who work less than 600 hours increased from 4.01 (2021) to 4.12 (2023).
- Q12 scores for variable-hour employees who work more than 600 hours decreased from 3.7 (2021) to 3.64 (2023). Moreover, VHE (600+) data shows an overall decrease since 2019 in Recognition and Praise (Q4), Development (Q6), Opinions Count (Q7), Learn and Grow (Q12), and DEI data.

Theme 3: Metro made some strong gains in employee engagement, management, and development metrics, but there is room for improvement.

Gallup’s overall benchmark suggests that Metro can improve on three Q12 items – Know What’s Expected of Me (Q1), Opportunity to Do Best (Q3), and Learn and Grow (Q12). Suggestions for improvement involve bettering the onboarding system, goal-setting systems, communications with management, employee autonomy, utilizing employees’ unique talents, and professional development.

Survey data suggests Metro to continue to stay the course in further supporting employee development, learning opportunities, and the performance review process.

Theme 4: Quantitative results for DEI remained fairly consistent, but qualitative results indicate a range of awareness and individual experience. There needs to be a continued investment in training, coaching, communication, and leadership modeling of DEI as a priority.

- Increases to the DEI Agreement Mean from 2021 to 2023 were found in the following two statement questions: “Metro measures its progress on DEI effectively to improve performance” (from 3.15 to 3.25) and “I feel informed about important issues at Metro” (from 3.52 to 3.89).
- Decreases found when comparing 2021 to 2023 were found in – “DEI is a high priority at Metro” (4.30 to 4.13) and “I have clear and accessible avenues to get involved in work to advance DEI (3.81 to 3.71).

Qualitative DEI data found 31.5% of comments on the challenge of leadership follow-through, 27.5% of comments related to praise for Metro's strategy and commitment to DEI, 24.6% to Metro’s DEI training/education, 20% to Metro’s improved hiring practices, 18% of comments from BIPOC employees (1 in 5) reflected a lack of awareness about Metro’s accomplishments, and 15.5% of comments related to employee desire for Metro to “show” more DEI work.



Metro

**EMPLOYEE
ENGAGEMENT
SURVEY
FINDINGS
2023**

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Section 1: Survey Methodology

Project Team

The Engagement and DEI findings featured in this report stem from data collected by Gallup, Inc. via the 2023 Employee Engagement Survey. The 2023 survey was successfully conducted through efforts by the Human Resources team, Internal Communications team, and the DEI Department. Lexicon and Line President/Principal Investigator Mary Johnstun led the reporting, analysis, and consultation components of the project. Team members Dr. Dana Krueger, and Julia Schildwachter supplied analysis, consultation, research, and recommendations.

Survey Administration

Gallup's Employee Engagement survey officially opened the morning of July 28th and closed August 11th. Employees were provided web access to the survey. Metro Leadership offered full support and encouragement for the survey. Furthermore, the Metro Employee Experience project group and their networks supported the survey by sharing information and encouraging participation in remote and onsite meetings and events.

Gallup supplied final aggregate data (for Metro as a whole, by department, and by key demographics) for the Q¹² and other survey items. Gallup also calculated the Q¹² mean scores and overall engagement mean scores. These final, aggregate data were supplied to Ms. Johnstun at Lexicon and Line for overall reporting and for additional Employee Engagement and DEI-focused data analysis. Additional analysis involved the creation of the following: Overall Mean Agreement scores from DEI-focused agreement questions, Overall Mean Reporting Confidence scores from questions centered on employee confidence in reporting procedures, and a revised DEI-focused (i.e., harassment, discrimination, or ethics reporting) Reporting Confidence Means. Additional study was completed to carefully compare 2023 data to previous data (from 2018, 2019, and 2021) across all subgroups, as well as study the data from the perspective of statistical significance. Specific study of the percent of change was conducted to identify data changes of significance.

Survey Participants

Participation was successful for the 2023 Metro Employee Engagement Survey, with 920 employees (68% of the employee population) participating. This participation rate was more comparable to pre-pandemic administrations of the survey. An overview of participation across all demographic categories is provided on the following pages. Note that data for demographic groups/subgroups with six or fewer participants are not featured in this report.

It is important to note, when comparing 2021 and 2023 data, that the 2021 survey was conducted when some departments were not yet at full operating capacity due to the COVID-19 pandemic. While the 2023 Survey participation represents departments at full capacity, some departments' 2021 and 2023 data might not be directly comparable. For these departments, comparisons from 2019 to 2021 should be approached with caution. Departments are encouraged to study their subgroup-level participation to better understand how their data from 2021 compare to those of previous administrations of the survey. For example, in 2021, 34 individuals from Oregon Convention Center participated in the survey, and in 2023, participation increased to 96. Likewise, for Portland's, 2021 participation nearly doubled -- 35 in 2021 and 68 in 2023.

Table 2 presents survey participation across the Metro Employee Engagement Survey's nine additional demographics items: race/ethnicity, gender identity, sexual orientation, disability status, employment status, job type, compensation status, work unit, and work location. Two years of data are available by work location. In 2021, 36% of employees were working onsite, 55% working remotely, 4% working in a hybrid capacity, 3% working as new hires, and 2% preferring not to respond. In the latest 2023 data, those working arrangements shifted to 52% onsite, 33% remote, 12% hybrid, 2% working as new hires, and 2% preferring not to respond.

The 2023 survey demographics were similar to those found in 2021. There were increases in the numbers of variable hour employee participating participation (8.6% of participants in 2021, 14.6% of participants in 2023), which can be attributed to the differences in the sample population at the time of the 2021 survey and at the time of the 2023 survey.

Table 1: Agency and Department-level Participation

	2018	2019	2021	2023		
	# of Survey Respondents	# of Survey Respondents	# of Survey Respondents	# of Survey Respondents	Employee Counts at the Time of the Survey	% of Employee Population Surveyed
Metro Agency Overall	874	994	629	920	1359	68%
Capital Asset Management	—	—	21	31	34	91%
Communications	30	26	22	13	32	41%
Council Office/COO/GAPD	27	33	29	31	42	74%
Diversity Equity & Inclusion	—	—	—	7	8	88%
Portland Expo Center	16	21	6	18	23	78%
Finance and Regulatory Services	39	42	40	47	71	66%
Housing	—	—	—	15	17	88%
Human Resources	21	23	23	28	28	100%
Information Services	19	21	15	27	34	79%
Office of Metro Attorney	13	9	14	17	18	94%
Oregon Convention Center	94	151	34	96	134	72%
Oregon Zoo	222	246	125	195	286	68%
Parks and Nature	88	93	75	93	141	66%
Planning	47	32	57	56	80	70%
Portland'5 Center for the Arts	76	125	35	68	201	34%
Waste Prevention and Environmental Services	161	149	115	152	210	72%
Prefer not to respond	—	—	—	27	—	—

Table 2: Participant Demographics

Please note: Due to non-responses and/or rounding, percentages/numbers provided will not always add to the sum of 920 participants and 100%.

	2018		2019		2021		2023	
	N	% of Survey Population	N	% of Survey Population	N	% of Survey Population	N	% of Survey Population
Metro Agency Overall	874	100%	994	100%	629	100%	920	100%
Race/Ethnicity								
Asian or Asian American	24	2.80%	22	2.20%	18	2.90%	34	3.70%
Black or African American	34	3.90%	50	5.00%	26	4.10%	48	5.22%
Hispanic or Latino/a/x	48	5.50%	47	4.70%	42	6.70%	66	7.17%
Native American, American Indian or Alaska Native	*	*	8	0.80%	8	1.30%	11	1.20%
Native Hawaiian or Pacific Islander	*	*	*	*	*	*	*	*
White	608	69.70%	674	67.90%	440	70.00%	604	65.65%
I identify with more than one option listed	53	6.10%	58	5.80%	29	4.60%	55	5.98%
Prefer not to respond	91	10.40%	130	13.10%	64	10.20%	98	10.65%
Gender Identity								
Woman	439	50.30%	485	49.20%	332	52.80%	473	51.41%
Man	348	39.90%	394	40.00%	230	36.60%	319	34.67%
Non-Binary gender, genderqueer or third gender	14	1.60%	14	1.40%	16	2.50%	29	3.15%
Transgender	*	*	*	*	*	*	7	0.76%
Gender not listed	*	*	*	*	*	*	8	0.87%
Two Spirit	---	---	---	---	---	---	*	*
Prefer not to respond	63	7.20%	92	9.30%	49	7.80%	77	8.37%
Sexual Orientation								
Asexual	29	3.30%	25	2.50%	14	2.20%	27	2.93%
Bisexual	35	4.00%	54	5.40%	38	6.00%	58	6.30%
Gay/Lesbian	46	5.30%	49	4.90%	43	6.80%	61	6.63%
Heterosexual	578	66.10%	648	65.30%	407	64.70%	572	62.17%
Pansexual	14	1.60%	26	2.60%	19	3.00%	38	4.13%
Sexuality not listed	17	1.90%	13	1.30%	11	1.70%	11	1.20%
Prefer not to respond	155	17.70%	178	17.90%	97	15.40%	153	16.63%
Disability Status**								
Yes, Indicated having a disability	119	13.80%	150	15.10%	56	8.90%	175	19.02%
No, Indicated presently not having a disability	623	71.50%	715	72.50%	523	83.10%	649	70.54%
Prefer not to respond	129	14.8	121	12.30%	50	7.90%	97	10.54%

(Continued on page 5)

*Demographics-level findings for subgroups with six or fewer participants have been removed from this report in order to protect the confidentiality and anonymity of participants.

**2018 and 2019 Surveys used a demographics item for Disability that listed separate disability types. Because the 2021 and 2023 surveys merely provided participants with three options — Yes, No, and Prefer not to respond — the 2018 and 2019 demographics data have been rolled up for comparison.

Table 2: Participant Demographics

Please note: Due to non-responses and/or rounding, percentages/numbers provided will not always add to the sum of 920 participants and 100%.

	2018		2019		2021		2023	
	N	% of Survey Population	N	% of Survey Population	N	% of Survey Population	N	% of Survey Population
Employment Status								
Regular or Part-time employees who have worked at least 600 hours over the past 12 months	675	77.20%	769	77.40%	547	87.00%	749	81.41%
Variable hour employees who have worked more than 600 hours over the past 12 months	94	10.80%	101	10.20%	22	3.50%	70	7.61%
Variable hour employees who have worked less than 600 hours over the past 12 months	105	12.00%	124	12.50%	32	5.10%	64	6.96%
Prefer not to respond	—	—	—	—	28	4.50%	38	4.13%
Job Type								
Manager/Supervisor	176	20.10%	199	20.00%	150	23.80%	182	19.78%
Non-Manager/Non-Supervisor	698	79.90%	795	80.00%	454	72.20%	690	75.00%
Prefer not to respond	—	—	—	—	25	4.00%	49	5.33%
Compensation status								
Hourly	517	59.20%	613	61.70%	274	43.60%	446	48.48%
Salaried	357	40.80%	381	38.30%	332	52.80%	433	47.07%
Prefer not to respond	—	—	—	—	23	3.70%	42	4.57%
Work Location								
Onsite, at one of Metro’s facilities	—	—	—	—	228	36.20%	475	51.63%
Remote, not at a Metro facility	—	—	—	—	347	55.20%	301	32.72%
I evenly split my time between working remotely and onsite	—	—	—	—	24	3.80%	111	12.07%
I did not work here last year	—	—	—	—	19	3.00%	15	1.63%
Prefer not to respond	—	—	—	—	11	1.70%	19	2.07%

Questionnaire

This report focuses largely on data from the 2018, 2019, 2021, and 2023 administrations of the Metro Employee Engagement Survey, though data from 2017 and prior are included when available. Before 2018, the Metro Employee Engagement Survey and Metro’s diversity, equity, and inclusion (DEI) survey were administered separately. In 2018, the Metro Employee Engagement Survey began to include both employee engagement and DEI items on one survey form. The 2023 questionnaire received minimal changes to the demographics questions included in the form: department titles were updated/added as needed, and reporting confidence items were decreased from 12 items (2019, 2021) to 6 items, by keeping safety reporting questions as-is, but grouping discrimination, harassment, and unethical behavior into one set of questions.

The survey utilizes Gallup’s Q¹² scale to measure employee engagement through one overall satisfaction item and 12 items across four themes: basic needs, teamwork, accomplishment, and growth. For DEI data collection, 13 agreement/knowledge statements related to DEI understanding, buy-in, and support are included in the survey, along with 6 confidence statements related to reporting confidence (three of these questions specifically related to reporting of harassment and discrimination). Three open-ended questions regarding DEI and one open-ended question regarding engagement are included at the end of the survey.

Analysis of Mean Scores

The data of this report largely focus on the analysis of mean scores. A majority of quantitative questions on the survey asked employees to express their level of agreement on a 5-point Likert scale where 5 meant “Strongly Agree” and 1 meant “Strongly Disagree.” Questions regarding reporting confidence used a 5-point Likert scale where 5 meant “Confident” and 1 meant “Not confident.” Additionally, there was one 5-point knowledge scale that was used to determine employee knowledge of Metro’s Strategic Plan to Advance Racial Equity, Diversity, and Inclusion. Mean scores for all of these items have been created, as well as categorical “overall” mean scores for the following:

1. All Q¹² questions and the four Q¹² level categories, referred to as the “Q¹² mean” in this report
2. All DEI-focused items, referred to as “DEI mean agreement” in this report
3. All reporting confidence items, referred to as “Overall reporting confidence” in this report
4. DEI-focused reporting confidence items (harassment and discrimination only)

The analyses in this report focus on the data for the Agency as a whole, by Department, and by demographics subgroup. Data were not analyzed for demographic groups totaling 6 or fewer participants in order to protect employee confidentiality and anonymity.

Section 2: Findings

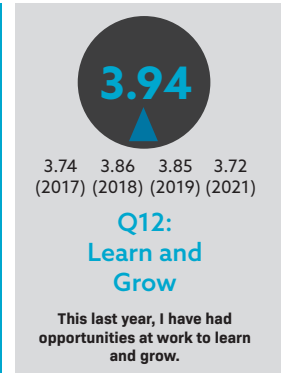
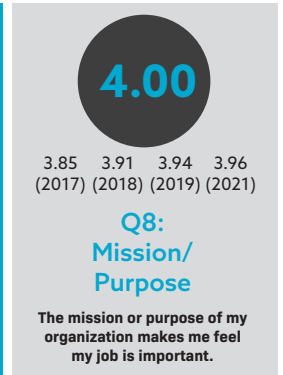
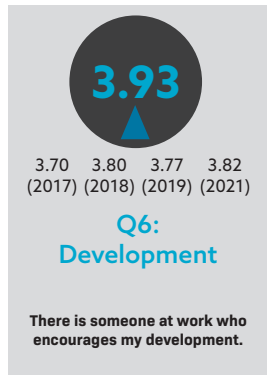
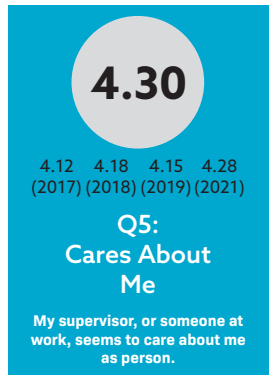
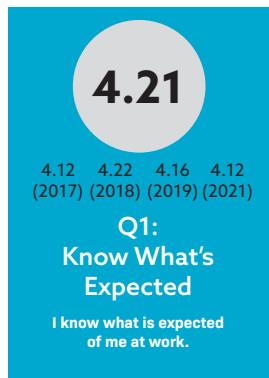
Metro's overall Q¹² Employee Engagement score showed an increase from 2021 to 2023.

Metro has seen significant gains in employee engagement and job satisfaction since 2017 when it began to use Gallup's Q¹² question set to measure engagement. Metro's Q¹² engagement mean score increased from 3.7 in 2017 to 3.92 in 2023, and the mean score for Overall Satisfaction increased from 3.68 in 2017 to 3.87 in 2023. From 2021 to 2023, Metro's Q¹² Engagement Mean increased significantly from 3.83 in 2021 to 3.92; and overall satisfaction increased from 3.75 in 2021 to 3.87 in 2023.

Four items showed notable increases (of 0.1 point or more):

- Q3: Opportunity to Do My Best (3.70 mean in 2021, 3.92 in 2023).
- Q6: Development (3.82 mean in 2021, 3.93 in 2023).
- Q7: Progress (3.50 mean in 2021, 3.76 in 2023).
- Q9: Learn and Grow (3.72 mean in 2021, 3.94 in 2023).

No items showed a significant decrease (i.e., a decrease of 0.1 or more), and the only Q12 items to show any decrease at all was Best Friend at Work (decreased from 3.2 in 2021 to 3.16 in 2023).



Q¹² Hierarchy: Improvements at All Levels of Employee Engagement

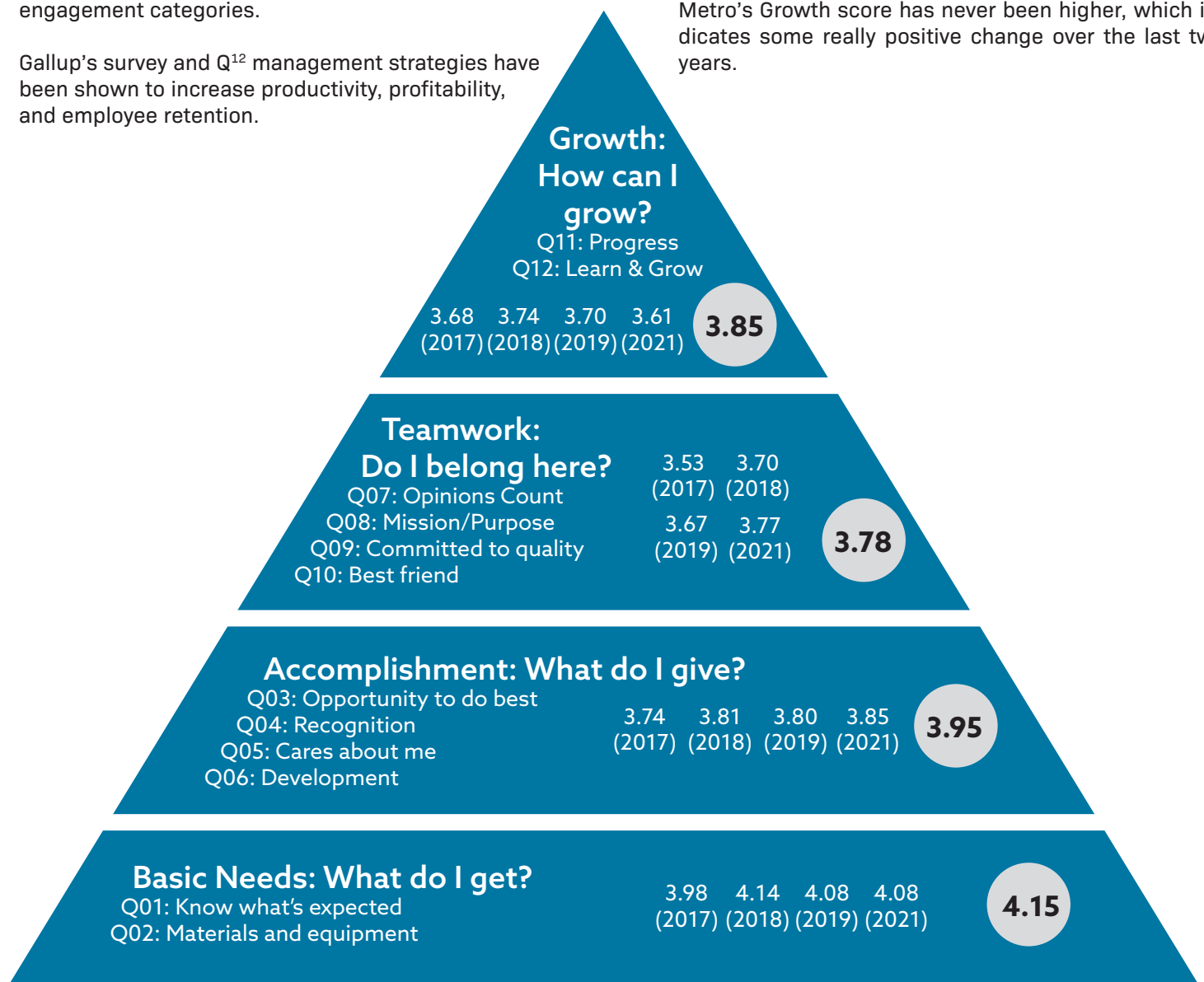
The Gallup Q¹² Survey is based on 30 years of scientific research with more than 35 million employees. To determine what employees require for growth, Gallup interviewed more than 1 million managers to identify the highest predictors of team and employee performance.

From this research, Gallup was able to determine 12 unique items which represent four fundamental employee engagement categories: (1) Basic Needs (*What do I get?*), (2) Accomplishment (*What do I give?*), (3) Teamwork (*Do I belong here?*), and (4) Growth (*How can I grow?*). The triangle below demonstrates the hierarchy of these four engagement categories.

Gallup's survey and Q¹² management strategies have been shown to increase productivity, profitability, and employee retention.

The image below displays Metro data from 2017 to present across the Gallup Q¹² four hierarchical levels.

- **Basic Needs** showed an insignificant increase (4.08 in 2021 to 4.15 in 2023), but it has increased significantly since 2017.
- **Accomplishment** showed a significant increase (3.85 in 2021 to 3.95 in 2023) and is significantly higher than where it began in 2017 (3.74).
- **Teamwork** showed an insignificant increase from 3.77 in 2021 to 3.78 in 2023 (an increase of .25 since 2017).
- **Growth** showed the most significant increase since the last administration (3.64 in 2021, 3.85 in 2023). Metro's Growth score has never been higher, which indicates some really positive change over the last two years.



See Section 4 for Key Themes related to Q¹² means and findings.

Q¹² Comparing Shifts in Ranking

The tables below rank each Q¹² each question in order from greatest satisfaction to least satisfaction by administration year. The 2023 Survey showed a significant positive shift in rankings for with Q¹² **Learn and Grow and Progress**, which place these rankings more in-line with pre-pandemic/2019 rankings. Make no mistake — each of these questions/concepts is an important component of the Q¹² Model. This ranking comparison merely allows us to identify star performers and key shifts in employee engagement at Metro over time.

2018 Q ¹² Rankings		2019 Q ¹² Rankings		2021 Q ¹² Rankings		2023 Q ¹² Rankings	
1	Q1 4.12 I know what is expected of me at work.	1	Q1 4.16 I know what is expected of me at work.	1	Q5 4.28 My supervisor, or someone at work, seems to care about me as person.	1	Q5 4.30 My manager, or someone at work, seems to care about me as a person.
2	Q5 4.12 My supervisor, or someone at work, seems to care about me as person.	2	Q5 4.15 My supervisor, or someone at work, seems to care about me as person.	2	Q9 4.17 My colleagues are committed to doing quality work.	2	Q1 4.21 I know what is expected of me at work.
3	Q9 3.9 My colleagues are committed to doing quality work.	3	Q9 4.00 My colleagues are committed to doing quality work.	3	Q1 4.12 I know what is expected of me at work.	3	Q9 4.18 My colleagues are committed to doing quality work.
4	Q8 3.85 The mission or purpose of my organization makes me feel my job is important.	4	Q2 4.06 I have the materials and equipment I need to do my work right.	4	Q2 4.04 I have the materials and equipment I need to do my work right.	4	Q2 4.09 I have the materials and equipment I need to do my work right.
5	Q2 3.84 I have the materials and equipment I need to do my work right.	5	Q8 3.94 The mission or purpose of my organization makes me feel my job is important.	5	Q8 3.96 The mission or purpose of my organization makes me feel my job is important.	5	Q8 4.00 The mission or purpose of my organization makes me feel my job is important.
6	Q12 3.74 This last year, I have had opportunities at work to learn and grow.	6	Q12 3.86 This last year, I have had opportunities at work to learn and grow.	6	Q6 3.82 There is someone at work who encourages my development.	6	Q12 3.94 This last year, I have had opportunities at work to learn and grow.
7	Q6 3.7 There is someone at work who encourages my development.	7	Q6 3.8 There is someone at work who encourages my development.	7	Q7 3.73 At work, my opinions seem to count.	7	Q6 3.93 There is someone at work who encourages my development.
8	Q3 3.68 At work, I have the opportunity to do what I do best every day.	8	Q3 3.75 At work, I have the opportunity to do what I do best every day.	8	Q12 3.72 This last year, I have had opportunities at work to learn and grow.	8	Q3 3.92 At work, I have the opportunity to do what I do best every day.
9	Q11 3.61 In the last six months, someone at work has talked to me about my progress.	9/10	Q7 3.62 At work, my opinions seem to count.	9/10	Q7 3.58 At work, my opinions seem to count.	9	Q7 3.80 At work, my opinions seem to count.
10	Q7 3.53 At work, my opinions seem to count.	9/10	Q11 3.62 In the last six months, someone at work has talked to me about my progress.	10	Q11 3.56 In the last six months, someone at work has talked to me about my progress.	10	Q11 3.76 In the last six months, someone at work has talked to me about my progress.
11	Q4 3.46 In the last seven days, I have received recognition or praise for doing good work.	11	Q4 3.51 In the last seven days, I have received recognition or praise for doing good work.	11	Q4 3.49 In the last seven days, I have received recognition or praise for doing good work.	11	Q4 3.67 In the last seven days, I have received recognition or praise for doing good work.
12	Q10 2.82 I have a best friend at work.	12	Q10 3.19 I have a best friend at work.	12	Q10 3.15 I have a best friend at work.	12	Q10 3.16 I have a best friend at work.

Q¹² Employee Engagement Department Highlights

This section features Q¹² Employee Engagement data by Department. Department-level analysis will consider both Gallup's Overall Satisfaction item and its 12 individual Q¹² items, with a focus on departments that are leading for each item in terms of presenting high scores, as well as those making notable gains in engagement from 2021 to 2023. As was discussed in Section 1: Survey Methodology, some departments showed a significant increase in employees/participants in the 2023 survey, in comparison to 2021 survey. Please study participation changes in Tables 1 and 2 to gain perspective on data changes from 2021 to 2023. The Office of the Metro Attorney and Council Office/COO/GAPD have historically been excluded from this highlights summary.

In terms of overall Q¹² engagement scores, department-level leaders were the following: Human Resources (4.48 Q¹² mean), Information Services (4.29 Q¹² mean), Capital Asset Management (4.25 Q¹² mean), and Capital Asset Management (4.25). Top scorers by individual Q¹² item are highlighted below.

- **How satisfied are you with your organization as a place to work?**
 - Leading departments include Capital Asset Management (4.39), Human Resources (4.38), and Information Services (4.37).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Communications, Finance and Regulatory Services, Human Resources, Information Services, Oregon Zoo, Parks and Nature, Planning/Development/Research (PDR), Portland Expo Center, and Portland'5.
- **I know what is expected of me at work.**
 - Leading departments include Portland Expo Center (4.78), Finance and Regulatory Services (4.53), Human Resources (4.52), and Capital Asset Management (4.42).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Communications, Finance and Regulatory Services, Information Services, Oregon Zoo, PDR, and Portland Expo Center.
- **I have the materials and equipment I need to do my work right.**
 - Leading departments include Finance and Regulatory Services (4.47), Human Resources (4.54), Information Services (4.44), Housing (4.33), and Planning/Development/Research (4.41).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, Parks and Nature, PDR, and Portland Expo Center
- **At work, I have the opportunity to do what I do best every day.**
 - Leading departments include Portland Expo Center (4.41), Human Resources (4.37), Capital Asset Management (4.35), and Finance and Regulatory Services (4.34).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Communications, Finance and Regulatory Services, Human Resources, Oregon Zoo, Parks and Nature, PDR, Portland'5 Center for the Arts
- **In the last seven days, I have received recognition or praise for doing good work.**
 - Leading departments include Human Resources (4.58), Portland Expo Center (4.57), DEI (4.14), and Housing (4.15).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, PDR, and Portland Expo Center
- **My supervisor, or someone at work, seems to care about me as person.**
 - Leading departments include Communications (4.85), Human Resources (4.82), DEI (4.71), Housing (4.67), and Portland Expo Center (4.67).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, PDR, and Portland Expo Center
- **There is someone at work who encourages my development.**
 - Leading departments include Human Resources (4.70), Portland Expo Center (4.53), Communications (4.38), Capital Asset Management (4.19), and Finance and Regulatory Services (4.17).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, Oregon Zoo, Parks and Nature, and Waste Prevention and Environmental Services.
- **At work, my opinions seem to count.**
 - Leading departments include Human Resources (4.59), PDR (4.45), Capital Asset Management (4.45), Information Services (4.15), and Housing (4.07).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Oregon Zoo, and PDR.
- **The mission or purpose of my organization makes me feel my job is important.**

- Leading departments include Housing (4.73), Human Resources (4.46), Capital Asset Management (4.45), PDR (4.29), and Parks and Nature (4.25).
- Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Communications, Finance and Regulatory Services, Parks and Nature, PDR, and Portland’s Center for the Arts.
- **My colleagues are committed to doing quality work.**
 - Leading departments include Housing (4.73), Human Resources (4.59), Information Services (4.59), PDR (4.57), DEI (4.57), Capital Asset Management (4.55), and Portland Expo Center (4.50).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Communications, Information Services, and Parks and Nature.
- **I have a best friend at work.**
 - Leading departments include Portland Expo Center (3.80), Communications (3.73), Information Services (3.55), Oregon Zoo (3.52), and Human Resources (3.48).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, Oregon Zoo, and Portland’s Center for the Arts.
- **In the last six months, someone at work has talked to me about my progress.**
 - Leading departments include Human Resources (4.58), Information Services (4.50), DEI (4.29), Capital Asset Management (4.23), and Finance and Regulatory Services (4.22).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Human Resources, Information Services, Oregon Zoo, Parks and Nature, PDR, Waste Prevention and Environmental Services.
- **This last year, I have had opportunities at work to learn and grow.**
 - Leading departments include Human Resources (4.50), Capital Asset Management (4.45), Information Services (4.41), DEI (4.29), and FSR (4.26).
 - Notable gains (0.1 or more) from 2021 to 2023 were found in the following departments: Finance and Regulatory Services, Information Services, Oregon Zoo, PDR, and Waste Prevention and Environmental Services.

Finance and Regulatory Systems showed a significant increase (i.e., increases of 0.1 or greater) in all Q12 items from 2021 to 2023. Other departments showing significant improvement across many engagement areas were Information Services (improvement for ten items), PDR (improvement for ten items), and Oregon Zoo (improvement for nine items). Lexicon and Line suggests careful study of all departments that showed sizable employee engagement gains to better identify the root causes of these successes.

Q¹² Employee Engagement Demographics Subgroup Highlights

Table 3 on the following page provides demographics-level findings for Q¹² Mean Employee Engagement scores. These scores represent an overall measurement of Employee Engagement across one job satisfaction item and 12 individual employee engagement items. Subgroups with six or fewer participants were eliminated from analysis to ensure anonymity in reporting. Takeaways and highlights are as follows.

Race/Ethnicity: The following are Q¹² Employee Engagement means, ranked highest to lowest, for race/ethnicity subgroups: Multiracial (4.13), Hispanic/Latino/a/x (4.11), Asian/Asian American (4.00), White (3.99), Black or African American (3.81), Native American/American Indian (3.75). Those marking “prefer not to respond” showed a slight decrease in engagement, while the Black/African American employee group showed no significant change.

Gender Identity: Q¹² Employee Engagement means, ranked highest to lowest for gender identity: women (4.04); men (3.90); transgender (3.90); non-binary, gender queer, or third gender (3.89); “prefer not to respond” (3.34); and gender not listed (3.08). Employee Engagement for women increased from 3.87 in 2021 to 4.04 in 2023; while engagement for non-binary employees decreased from 4.17 in 2021 to 3.98 in 2023.

Disability: Q¹² mean employee engagement was higher for those without a disability (4.04) compared to those reporting a disability (3.68). There was no change in overall employee engagement from 2021 to 2023 for employees with disabilities, but a positive change was seen for those without a disability.

Sexual Orientation: Q¹² Employee Engagement means, ranked from highest to lowest across six sexual orientation subcategories: Bisexual (4.12), Gay/Lesbian (4.06), Heterosexual (3.99), Asexual (3.98), Pansexual (3.96), Sexuality not listed (3.97), and “prefer not to respond” (3.52). Q12 mean scores increased from 2021 to 2023 for Asexual,

Pansexual, and “prefer not to respond” employees, but decreased for those marking “sexuality not listed”.

Job Type: Managers/Supervisors (4.11) indicated a higher level of employee engagement than non-managers/non-supervisors (3.92). Both groups saw an increase of 0.1 in mean score from 2021 to 2023. .

Employment Status: Variable hour employees who have worked less than 600 hours over the past 12 months indicated the highest Q¹² employee engagement mean score (4.12) compared to variable hour employees working more than 600 hours (3.64) and regular/part-time employees (3.95). An increase from 2021 to 2023 was found for variable hour employees working less than 600 hours (4.01 in 2021, 4.12 in 2023), and for regular/part-time employees (3.85 in 2021, 3.95 in 2023). Variable hour employees working 600+ hours indicated a slight decrease in engagement.

Compensation Status: Salaried employees scored higher in overall employee engagement (4.13) compared to hourly employees (3.77). Salaried employees showed a significant change in engagement (3.99 in 2021, 4.13 in 2023).

Work Location: Q¹² Employee Engagement means, ranked from highest to lowest across four work location categories: New employees (4.21), Remote (4.16), Hybrid (4.09), and Onsite (3.74). Most groups showed a significant increase from 2021 to 2023, with hybrid employees showing the biggest increase (3.71 in 2021, 4.09 in 2023), followed by onsite employees (3.59 in 2021, 3.74 in 2023), and remote employees (4.01 in 2021, 4.16 in 2023).

Table 3: Q¹² Overall Employee Engagement Mean Scores by Demographics

		Q12 Means				Change 2021—2023 (Changes of +/- 0.1 flagged as significant)
		2018	2019	2021	2023	
Metro Agency Overall		3.81	3.79	3.83	3.92	0.09
Race/Ethnicity	Asian or Asian American	3.46	3.74	3.68	4	0.32
	Black or African American	3.7	4.04	3.78	3.81	0.03
	Hispanic or Latino/a/x	3.93	3.9	3.94	4.11	0.17
	Native American, American Indian or Alaska Native	4.35	4.31	3.54	3.75	0.21
	White	3.88	3.87	3.89	3.99	0.10
	I identify with more than one option listed	3.86	3.74	3.93	4.13	0.20
	Prefer not to respond	3.36	3.26	3.39	3.33	-0.06
Gender Identity	Woman	3.85	3.91	3.87	4.04	0.17
	Man	3.87	3.81	3.87	3.9	0.03
	Non-Binary gender, genderqueer or third gender	3.88	3.69	4.17	3.89	-0.28
	Transgender				3.9	
	Gender not listed				3.08	
Prefer not to respond	3.28	3.16	3.24	3.34	0.10	
Disability	Yes	3.78	3.7	3.66	3.68	0.02
	No	3.6	3.6	3.88	4.04	0.16
	Prefer not to respond	3.4	3.47	3.42	3.56	0.14
Sexual Orientation	Asexual	3.87	3.53	3.42	3.98	0.56
	Bisexual	3.82	3.75	4.04	4.12	0.08
	Gay/Lesbian	4.06	3.9	4	4.06	0.06
	Heterosexual	3.89	3.89	3.91	3.99	0.08
	Pansexual	3.36	3.61	3.39	3.96	0.57
	Sexuality not listed	3.66	3.71	4.29	3.97	-0.32
	Prefer not to respond	3.5	3.51	3.42	3.52	0.10
Job	Manager/Supervisor	4.16	4.01	4.01	4.11	0.10
	Non-Manager/Non-Supervisor	3.73	3.74	3.82	3.92	0.10
	Prefer not to respond	-	-	2.9	3.24	0.34
Employment Status	Regular or Part-time employees who have worked at least 600 hours over the past 12 months	3.78	3.79	3.85	3.95	0.10
	Variable hour employees who have worked more than 600 hours over the past 12 months	3.87	3.76	3.7	3.64	-0.06
	Variable hour employees who have worked less than 600 hours over the past 12 months	4.01	3.86	4.01	4.12	0.11
	Prefer not to respond	-	-	3.22	3.45	0.23
Compensation Status	Hourly	3.64	3.68	3.71	3.77	0.06
	Salaried	4.06	3.97	3.99	4.13	0.14
	Prefer not to respond	-	-	2.82	3.32	0.50
Remote/Onsite	Onsite, at one of Metro's facilities	-	-	3.59	3.74	0.15
	Remote, not at a Metro facility	-	-	4.01	4.16	0.15
	I evenly split my time between working remotely and from onsite	-	-	3.71	4.09	0.38
	I did not work here last year	-	-	4.14	4.21	0.07
	Prefer not to respond	-	-	2.64	3.51	0.87

Additional Employee Engagement Data

The 2021 Employee Engagement Survey also collected other employee engagement data that have been gathered through previous Metro surveys since 2012. These additional questions focused on department leadership, department pride, work/life balance flexibility, and workload.

Additional Employee Engagement Items

As with Q¹² scores, additional employee engagement items showed slight decreases since 2018. Of the five questions featured below, “I am proud to work for my department” received the highest agreement mean (4.10). Key findings follow.

I have confidence that my department has the leadership in place to be successful.

- 2023 mean score is 3.70 (compared to 3.52 in 2017, 3.69 in 2018, 3.55 in 2019, 3.52 in 2021)
- Leading departments include Portland Expo Center (4.44), Human Resources (4.37), Capital Asset Management (4.35), Finance and Regulatory Services (4.30), and Information Services (4.26).
- Departments showing some of the biggest increases for this item from 2021 to 2023 were as follows: Finance and Regulatory Services, Information Services, Oregon Zoo, PDR, Waste Prevention and Environmental Services.
- By race/ethnicity, the following subgroups showed significant decreases from 2021 to 2023: Asian/Asian American (4.17 in 2021 to 3.97 in 2023) and “prefer not to respond” (2.83 in 2021 to 2.69 in 2023). All other race/ethnicity categories showed a significant increase of 0.1 or higher.
- By employee status, variable hour employees working less than 600 hours indicated the highest confidence (4.11), followed by regular/part-time employees (3.71). Variable hour employees working 600+ hours had the lowest confidence (3.36). All three of these employee status subgroups saw an increase in confidence from 2021 to 2023.
- When looking at these data by worker location, new employees scored the highest (4.20), followed by remote workers (4.03) and hybrid (3.88). Those working in a hybrid fashion saw the biggest shift from 2021 to 2023 (3.04 in 2021, 3.88 in 2023).

I am proud to work for my department.

- 2023 mean score is 4.20 (compared to 4.11 in 2017, 4.12 in 2018, 4.10 in 2019, 4.14 in 2021)
- Leading departments include Housing (4.73), Portland Expo Center (4.72), Human Resources (4.57), and Capital Asset Management (4.52)
- Departments showing some of the biggest increases for this item from 2021 to 2023 were as follows: Finance and Regulatory Services, Information Services, Oregon Zoo, PDR, Waste Prevention and Environmental Services
- By race/ethnicity, most subgroups saw positive changes from 2021 to 2023 for this item. For example, the Black/African American employee score increased from 4.00 in 2021 to 4.21 in 2023, the Hispanic/Latino/a/x score increased from 4.29 in 2021 to 4.45 in 2023, and the score for White employees increased from 4.19 in 2021 to 4.28 in 2023. That said, the Native American score decreased (4.43 in 2021, 4.00 in 2023).
- When looking at these data by worker location, new employees scored the highest (4.71, up from 4.37 in 2021), followed by remote workers (4.39, up from 4.27 in 2021). Those working in onsite scored the lowest of the four subgroups (4.07, up slightly from 4.0 in 2021).

I have enough flexibility in my job to maintain work/life balance.

- 2023 mean score is 4.07 (compared to 3.72 in 2017, 4.02 in 2018, 3.88 in 2019, and 3.90 in 2021)
- Leading departments were Information Services (4.78), DEI (4.57), Human Resources (4.46), Capital Asset Management (4.45), PDR (4.43), and FRS (4.40).
- This question showed some of the biggest changes by department from 2021 to 2023. Communications’ mean score increased from 4.05 in 2021 to 4.15 in 2023, Information Services’ score increased from 4.13 in 2021 to 4.78 in 2023, Oregon Zoo’s score increased from 3.20 in 2021 to 3.89 in 2023, Portland Expo’s score increased from 3.17 in 2021 to 4.12 in 2023, Portland’5’s score increased from 3.61 in 2021 to 4.16 in 2023, and WPES’ score increased from 3.76 in 2021 to 3.96 in 2023.
- By race/ethnicity, Native Hawaiian/Pacific Islander employees scored the lowest (3.80), followed by Black/African American employees (3.83). All race/ethnicity subgroups saw positive change or no change from 2021 to 2023 for this item. The biggest increases were found for multi-racial employees (3.97 in 2021, 4.33 in 2023), Black/African American employees (3.5 in 2021 to 3.83 in 2023), and Asian/Asian American (3.94 in 2021, 4.26 in 2023).
- When looking at these data by worker location, remote workers scored the highest (4.39 in 2023, up from 4.25 in 2023). Those working onsite scored the lowest of the four subgroups (3.85 in 2023, up from 3.38 in 2021).

Table 4: Additional Employee Engagement and Communication Items

		2012	2014	2017	2018	2019	2021	2023	Change from 2021 to 2023
Employee Engagement and Communication	I have confidence that my department has the leadership in place to be successful.	3.4	3.5	3.52	3.69	3.55	3.52	3.7	0.18
	I am proud to work for my department.	4.1	3.9	4.11	4.12	4.1	4.14	4.2	0.04
	I have enough flexibility in my job to maintain work/life balance.	3.7	3.8	3.72	4.02	3.88	3.9	4.07	0.17
	In general, the amount of work I am asked to do is reasonable.	3.7	3.7	3.7	3.87	3.84	3.53	3.89	0.36
	I feel informed about workplace events, policies, changes, budget or other Metro news.	-	-	-	-	-	3.84	3.89	0.05
Employee-Preferred Communication Tools	During a work week, how often do you have access to a computer and are provided paid time to read Metro email updates or access information on MetroNet.								
	I have regular access every week.	-	-	-	-	-	91%	87%	-4%
	I sometimes have access but not every week.	-	-	-	-	-	4%	6%	2%
	I do not have regular access.	-	-	-	-	-	5%	7%	2%
	How would you prefer to receive information about benefits, resources and updates about Metro? (Select all that apply)								
	Email Messages	-	-	40%	54%	48%	26%	54%	28%
	MetroNet	-	-	7%	5%	5%	9%	12%	3%
	Supervisor or Manager	-	-	16%	16%	18%	22%	20%	-2%
	Workplace bulletin board or handouts	-	-	-	-	-	20%	8%	-12%
	Text	-	-	-	-	-	16%	4%	-8%
Other	-	-	9%	6%	7%	-	3%	-	

In general, the amount of work I am asked to do is reasonable.

- 2023 mean score is 3.89 (compared to 3.7 in 2017, 3.87 in 2018, 3.84 in 2019, 3.53 in 2021)
- Leading departments include Capital Asset Management (4.48), Finance and Regulatory Services (4.17), Portland’5 (4.10), and Housing (4.07). Human Resources (3.83), Capital Asset Management (3.9)
- From 2021 to 2023, 9 of 13 departments reported decreases for this item; from 2021 to 2023, however, all but one department showed a significant improvement for this item. The OCC is the only department to show a decrease (from 3.82 in 2021 to 3.68 in 2023).
- By race/ethnicity, all subgroups showed significant increases in their scores for this item, with the biggest increase found for Hispanic/Latino/a/x employees (3.48 in 2021, 4.19 in 2023).
- When looking at these data by worker location, new employees scored the highest (4.27, down from 4.39 in 2021), followed by remote workers (3.95, up from 3.64 in 2021). Those working onsite scored the lowest of the four subgroups (3.85, up from 3.36 in 2021).

Employee Preferences for Communication and Learning

Metro earned positive gains in communication/listening-related Q¹² and DEI items from 2019 to 2021. This subsection discusses data gathered from the 2021 Employee Engagement Survey’s additional communication items regarding employee access to Metro communications and their information sources.

During a work week, how often do you have access to a computer and are provided paid time to read Metro emails/updates or attend virtual town halls?

- In 2023, 87% of respondents reported “I have regular access every week,” 6% reported “I sometimes have access but not every week,” and 7% reported “I do not have regular access.” When comparing 2021 and 2023 data, the percent of students reporting having regular access every week has decreased slightly (91% in 2021, 87% in 2023).
- By department, employees at the Oregon Zoo, the Expo Center, OCC, and Portland’5 were more likely to indicate that they either “sometimes have access” or “do not have regular access” (29% at the Expo Center, 26% at the Zoo, 22% at P’5, 20% at the OCC).
- By race, Black or African American participants and Native Hawaiian/Pacific Islanders participants were more likely to indicate that they either “sometimes have access” or “do not have regular access” (17% of Black/African Americans, 20% of Hispanic/Latino/a/x participants).
- Looking at the data by gender, 21% of non-binary gender, genderqueer, or third gender employees reported “sometimes have access” or “do not have access” -- the highest reporting this of all gender identity groups.
- By sexual orientation, Asexual employees, Bisexual employees, and Gay/Lesbian employees reported the highest rates of having irregular or no access (26%, 16%, and 18% respectively).

How would you prefer to receive information about benefits, resources and updates about Metro?

Table 3 on the previous page reports response options for this item across several administrations of the survey. In 2023, respondents indicated getting information from the following sources:

- Email messages (54% in 2023, up from 26% in 2021)
- MetroNet (12% in 2023, up from 9% in 2021)
- Supervisor or Manager (20% in 2023, down slightly from 22% in 2023)
- Workplace bulletin board or handouts (8% in 2023, down from 20% in 2021)
- Text (4% in 2023, down from 16% in 2021)
- All departments reported a preference for email messages, with responses for this option ranged from as high as 75% for DEI to 46% for those in WPES. The second-highest information source was supervisor/manager (as high as 27% for Capital Asset Management to as low as 0% for DEI).
- By race/ethnicity, preference for email messages as their go-to for information ranged from as high as 57% for White employees and as low as 37% for Native American/American Indian, or Alaska Native employees.
- Nonbinary gender, genderqueer, and third gender employees indicate that email messages as their top option for receiving information (37%), with supervisor/manager as the second highest option (26%).
- Regardless of employee status, there is a preference to receive information via email (55% for regular/part-time employees, 50% for variable hour (600+) employees, 46% for variable hour (<600) employees, and 48% for those who prefer not to respond.

Diversity, Equity, and Inclusion (DEI)

DEI Agreement Across 13 Items: Agency

Starting in 2018, Metro's Employee Engagement survey began to include questions regarding diversity, equity, and inclusion (DEI), some of which were continued from the Cultural Compass Diversity Survey (CCDS, in 2013 and 2015). Means for these DEI findings are presented in Table 5 with trend data from previous administrations where available/comparable.

The 2023 DEI data (see Table 5 on the following page) present the 13 DEI-focused questions, as well as an overall DEI Agreement Mean. Metro's overall DEI Mean Agreement score for 2023 is 3.77, identical to what it was in 2021. In general, DEI data from 2021 to 2023 either changed little or showed small decreases.

This section highlights some key DEI findings from the 2023 survey.

Agreement Statements Ranked

The 13 DEI-focused agreement items are presented in ranked order (from highest mean to lowest) below.

- #1: DEI is a high priority for Metro. (4.13 in 2023, down from 4.30 in 2021)
- #2: Metro clearly communicates the importance of diversity, equity and inclusion (DEI) to the agency's mission (4.08 in 2023, down from 4.14 in 2021)
- #3: My immediate supervisor actively engages in advancement of DEI strategies. (3.97 in 2023, down from 3.98 in 2021)
- #4: My department's leadership actively engages in advancement of DEI strategies. (3.92 in 2023, down from 3.95 in 2021)
- #5: I understand how my role relates to the overall goals and directions of Metro. (3.94 in 2023, up from 3.85 in 2021)
- #6: I have clear and accessible avenues to get involved in work to advance DEI. (3.71 in 2023, down from 3.81 in 2021)
- #7: It is clearly communicated how recruiting and retaining a diverse workforce is important for the work of Metro. (3.72 in 2023, down from 3.78 in 2021)
- #8: I feel I've received an appropriate level of professional skills development to advance DEI in my own work. (3.72 in 2023, up from 3.68 in 2021)
- #9: There is a clear strategy to work on DEI within Metro. (3.58 in 2023, down from 3.64 in 2021)
- #10/11: I believe that Metro is living our values of Public Service, Excellence, Teamwork, Respect, Innovation and Sustainability on a daily basis. (3.61 in 2023, up from 3.56 in 2021)
- #10/11: How knowledgeable about the agency-wide strategic plan to advance racial equity, diversity, and Inclusion are you? (3.48 in 2023, down from 3.56 in 2021)
- #12: I feel informed about workplace events, policies, changes, budget, or other Metro news. (3.89 in 2023, up from 3.52 in 2021) NOTE: This question wording changed slightly in 2023. The original wording used in 2021 and before was "I feel informed about important issues within Metro."
- #13: Metro measures its progress on DEI effectively to improve its performance. (3.25 in 2023, up from 3.15 in 2021)

Nine of 13 items showed little/no movement (i.e., changes of 0.9 or less). The most significant changes in scores were found for four items: “DEI is a high priority for Metro” (decreased from 4.30 in 2021 to 4.13 in 2023), “I have clear and accessible avenues to get involved in work to advance DEI” (decreased from 3.81 in 2021 to 3.71 in 2023), “Metro measures its progress on DEI effectively to improve its performance” (increase from 3.15 in 2021 to 3.25 in 2023), and “I feel informed about workplace events, policies, changes, budget, or other Metro news.” (increased from 3.52 in 2021 to 3.89 in 2023).

That said, all DEI scores are still significantly higher than when this work first began (see Table 5); and we see these decreases more as being stalled, rather than as moving backwards. Likewise, the significant increases regarding Metro’s DEI measurement and employees feeling informed should be applauded, as those two metrics have been stagnant for some time.

The change in scores from 2021 to 2023 appear to be mostly insignificant, with 2 items increasing scores by a significant amount, and 2 items decreasing scores by a significant amount. DEI efforts are still paying off in significant ways in the form of employee understanding of DEI, employee observations of DEI in action, and employee DEI involvement and access.

Please see the Qualitative data section for more insights regarding DEI at Metro.

Table 5: Diversity, Equity, and Inclusion (DEI) Agreement Item Mean Scores (2012 to present)

Diversity, Equity, and Inclusion (DEI) Agreement Statements	2012	2014	2017	2018	2019	2021	2023	Change 2021—2023 (Changes of +/- 0.1 flagged as significant)
I believe that Metro is living our values of Public Service, Excellence, Teamwork, Respect, Innovation and Sustainability on a daily basis.	3.5	3.4	3.48	3.6	3.56	3.56	3.61	0.05
Metro clearly communicates the importance of diversity, equity and inclusion (DEI) to the agency’s mission.	3.2	3.3	3.52	3.94	3.99	4.14	4.08	-0.06
My immediate supervisor actively engages in advancement of DEI strategies.	3.63	3.91	4.14	3.87	3.85	3.98	3.97	-0.01
My department’s leadership actively engages in advancement of DEI strategies.				3.84	3.82	3.95	3.92	-0.03
DEI is a high priority for Metro. (2013/2015 trend data reported here are from the CCDS)	3.65	3.72	-	4.08	4.08	4.30	4.13	-0.17*
I understand how my role relates to the overall goals and directions of Metro.	3.7	3.6	3.7	3.84	3.80	3.85	3.94	0.09
I have clear and accessible avenues to get involved in work to advance DEI.	3.3	3.3	3.64	3.63	3.66	3.81	3.71	-0.10*
I feel I’ve received an appropriate level of professional skills development to advance DEI in my own work.				3.48	3.49	3.68	3.72	0.04
How knowledgeable about the agency-wide strategic plan to advance racial equity, diversity, and Inclusion are you?				3.30	3.32	3.56	3.48	-0.08
There is a clear strategy to work on DEI within Metro. (2013/2015 trend data reported here are from the CCDS)	3.35	3.53	-	3.53	3.47	3.64	3.58	-0.06
It is clearly communicated how recruiting and retaining a diverse workforce is important for the work of Metro. (2013/2015 trend data reported here are from the CCDS)	3.48	3.63	-	3.63	3.60	3.78	3.72	-0.06
Metro measures its progress on DEI effectively to improve its performance. (2013/2015 trend data reported here are from the CCDS)	2.65	3.16	-	3.16	3.11	3.15	3.25	0.10
I feel informed about important issues within Metro.	3.2	3.3	3.42	3.42	3.33	3.52	3.89	0.19*
Overall DEI Agreement Mean	3.3 (2013 CCDS)		3.6	3.65	3.63	3.77	3.77	0.00

Diversity, Equity, and Inclusion (DEI)

DEI Agreement Across 13 Items: Department

Given the wealth of DEI questions, a simple way to assess Overall DEI understanding, buy-in, and support is through a look at an overall DEI Agreement Mean, which is an average of all 13 DEI items. This section focuses on these data at the department level.

For Overall Mean DEI Agreement, top scoring departments included Capital Asset Management (4.20), Information Services (4.20), Human Resources (4.19), Finance and Regulatory Services (4.19) and Council Office/COO/GAPD (4.08).

Question-by-question analysis by department also illustrated the following highlights and takeaways.

Of the 13 DEI items, the items that showed the greatest change (amount greater than 0.10) from 2021 across most departments were the following:

I believe that Metro is living our values of Public Service, Excellence, Teamwork, Respect, Innovation and Sustainability on a daily basis. (Significant increases in 8 departments and decreases in 2 departments)

I have clear and accessible avenues to get involved in work to advance DEI. (Significant increases in 3 departments and decreases in 6 departments)

There is a clear strategy to work on DEI within Metro. (Significant increases in 7 departments and decreases in 5 departments)

Metro measures its progress on DEI effectively to improve its performance. (Significant increases in 8 departments and decreases in 4 departments)

I feel informed about important issues within Metro. (Significant increases in 7 departments and decreases in 4 departments)

Table 6: Overall DEI Agreement Means by Department

	Overall DEI Agreement Mean				
	2018	2019	2021	2023	Change 2021—2023 (Changes of +/- 0.1 flagged as significant)
Metro Agency Overall	3.65	3.63	3.77	3.77	0.00
Asset Management and Capital Planning	-	-	4.00	4.20	0.20
Communications	3.86	3.76	3.75	3.53	-0.22
Council Office/COO/GAPD	4.08	4.29	3.99	4.08	0.09
Finance and Regulatory Services	3.82	3.63	3.90	4.19	0.29
Human Resources	3.38	3.06	4.30	4.19	-0.11
Information Services	3.87	3.69	3.52	4.20	0.68
Office of Metro Attorney	4.29	3.99	4.09	4.26	0.17
Oregon Convention Center	3.16	3.30	3.97	3.52	-0.45
Oregon Zoo	3.36	3.42	3.49	3.43	-0.06
Parks and Nature	3.78	3.81	3.82	3.81	-0.01
Planning	3.86	3.81	3.90	3.95	0.05
Portland Expo Center	3.86	4.02	3.97	3.93	-0.04
Portland's Center for the Arts	3.50	3.71	3.62	3.80	0.18
Waste Prevention and Environmental Services	3.97	3.87	3.74	3.78	0.04

Diversity, Equity, and Inclusion (DEI)

DEI Agreement Across 13 Items: Demographics Subgroups

Table 7 on the following page provides demographics-level findings for Metro's overall DEI mean agreement score, which accounts for employee responses across 13 DEI items. The higher the score, the greater the measurement of DEI understanding, buy-in, and support. Subgroups with six or fewer participants were eliminated from analysis to ensure anonymity in reporting. Takeaways and highlights are as follows:

Race/Ethnicity: The following are 2023 DEI agreement means, ranked highest to lowest, for race/ethnicity subgroups: Multiracial (3.91), White (3.86), Asian/Asian American (3.80), Native American/American Indian (3.78), Hispanic/Latino/a/x (3.77), Black or African American (3.55). Multiracial employees showed a significant increase in DEI understanding, buy-in, and support (3.56 in 2021 to 3.91 in 2023), as did Asian/Asian Americans (3.56 in 2021 to 3.80 in 2023). Most notably, Native American/American Indian employees saw the largest increase in over DEI agreement mean score (3.34 in 2021 to 3.78 in 2023). Only one subgroup showed significant decreases in overall DEI mean agreement from 2021 to 2023: Those preferring not to respond (3.51 in 2021 to 3.18 in 2023).

Gender Identity: Overall DEI Agreement means, ranked highest to lowest for gender identity are subgroups: women (3.88), men (3.78), non-binary, genderqueer, or third gender (3.59). Scores increased for women and men employees at an insignificant amount, while scores for non-binary, genderqueer, or third gender decreased significantly (3.90 in 2021, 3.51 in 2023).

Disability: Overall DEI Agreement was higher for those without a disability (3.89) compared to those reporting a disability (3.21). Individuals with a disability demonstrated a significant decrease in overall DEI means (3.61 in 2021 to 3.51 in 2023).

Sexual Orientation: Overall DEI Agreement means, ranked from highest to lowest across six sexual orientation subcategories: Sexuality not listed (3.90), Heterosexual (3.87), Asexual (3.87), Bisexual (3.80), Gay/Lesbian (3.74), Pansexual (3.59). The overall DEI Agreement mean increased significantly from 2021 to 2023 for those identifying as Asexual (3.30 in 2021 to 3.87) but decreased or increased for all other orientations by an insignificant amount.

Job Type: Managers/Supervisors (3.96) indicated a higher level of DEI understanding, buy-in, and support than non-managers/non-supervisors (3.75).

Employment Status: Variable hour employees who have worked less than 600 hours over the past 12 months indicated the highest DEI Agreement mean (4.03), followed by regular/part-time employees (3.80), and variable hour employees who have worked more than 600 hours over the past 12 months (3.43). Notable increases from 2021 to 2023 were found for variable hour employees who have worked less than 600 hours over the past 12 months (3.64 in 2021 to 4.03 in 2023).

Compensation Status: Salaried employees scored higher in overall DEI understanding, buy-in, and support (3.95) compared to hourly employees (3.60). The only significant increase in the overall DEI mean was from employees who chose not to respond with their compensation status (3.08 in 2021 to 3.49 in 2023).

Work Location: Overall DEI Agreement means, ranked from highest to lowest across four work location categories: New hires (4.06), hybrid workers (4.01), remote workers (3.99), onsite workers (3.55). The greatest increase in scores can be seen in hybrid workers (3.63 in 2021 to 4.01 in 2023), and new hires (3.83 in 2021 to 4.06 in 2023).

Table 7: Overall DEI Agreement Mean Scores by Demographic Subgroups

		Overall DEI Agreement Mean by Demographic Subgroups				
		2018	2019	2021	2023	Change 2021—2023 (Changes of +/- 0.1 flagged as significant)
Metro Agency Overall	Metro Agency Overall	3.65	3.63	3.77	3.77	0.00
Race/Ethnicity	Asian or Asian American	3.35	3.52	3.56	3.80	0.24
	Black or African American	3.45	3.72	3.56	3.55	-0.01
	Hispanic or Latino/a/x	3.71	3.68	3.71	3.77	0.06
	Native American, American Indian or Alaska Native	3.71	4.14	3.34	3.78	0.44
	White	3.72	3.73	3.86	3.86	0.00
	I identify with more than one option listed	3.80	3.47	3.56	3.91	0.35
	Prefer not to respond	3.10	3.06	3.51	3.18	-0.33
Gender Identity	Women	3.68	3.75	3.82	3.88	0.06
	Man	3.70	3.66	3.76	3.78	0.02
	Non-Binary gender, genderqueer or third gender	3.32	3.43	3.90	3.59	-0.31
	Prefer not to respond	3.04	2.91	3.51	3.21	-0.30
Disability	Yes	3.55	3.50	3.61	3.51	-0.10
	No	3.63	3.44	3.82	3.89	0.07
	Prefer not to respond	3.33	3.20	3.42	3.38	-0.04
Sexual Orientation	Asexual	3.67	3.43	3.30	3.87	0.57
	Bisexual	3.50	3.44	3.80	3.80	0.00
	Gay/Lesbian	3.75	3.73	3.79	3.74	-0.05
	Heterosexual	3.75	3.76	3.86	3.87	0.01
	Pansexual	3.02	3.56	3.51	3.59	0.08
	Sexuality not listed	3.53	3.52	3.90	3.92	0.02
	Prefer not to respond	3.33	3.20	3.49	3.39	-0.10
Job	Manager/Supervisor	4.06	3.91	4.00	3.96	-0.04
	Non-Manager/Non-Supervisor	3.54	3.55	3.73	3.75	0.02
	Prefer not to respond	-	-	3.13	3.28	0.15
Employment Status	Regular or Part-time employees who have worked at least 600 hours over the past 12 months	3.68	3.65	3.81	3.80	-0.01
	Variable hour employees who have worked more than 600 hours over the past 12 months	3.40	3.33	3.57	3.43	-0.14
	Variable hour employees who have worked less than 600 hours over the past 12 months	3.68	3.75	3.64	4.03	0.39
	Prefer not to respond	-	-	3.31	3.40	0.09
Compensation Status	Hourly	3.42	3.50	3.64	3.60	-0.04
	Salaried	3.95	3.83	3.92	3.95	0.03
	Prefer not to respond	-	-	3.08	3.49	0.41
Remote/Onsite	Onsite, at one of Metro's facilities	-	-	3.54	3.55	0.01
	Remote, not at a Metro facility	-	-	3.95	3.99	0.04
	I evenly split my time between working remotely and from onsite	-	-	3.63	4.01	0.38
	I did not work here last year	-	-	3.83	4.06	0.23
	Prefer not to respond	-	-	2.95	3.85	0.90

Employee Reporting Confidence

Reporting Confidence: Agency

This section discusses Metro employees' confidence regarding reporting 1) safety concerns and 2) harassment, discrimination, and unethical behavior. Metro's 2023 Employee Survey revised the way these topics were presented, decreasing the number of items from 12 to 6 — three questions on reporting knowledge, confidence in Metro's ability to handle reports appropriately, and confidence in reporting without receiving retaliation regarding safety concerns; and three similar questions related to reporting of harassing, discriminating, or unethical behavior. Changes between 2021 and 2023 safety reporting questions were minor and data should be comparable across all years. However, we suggest exercising caution in comparing 2023 and prior individual harassment, discrimination, and unethical behavior questions as those individual items are not directly comparable to older questions.

That said, we encourage data reviewers to consider comparing the "DEI Reporting Confidence" mean scores, which have historically rolled up like questions (in 2021 and prior, questions related to harassment and discrimination; and in 2023, questions regarding harassment, discrimination, and unethical behavior") into one DEI Confidence Mean.

Confidence in reporting safety concerns:

- *Knowing how to report:* Mean score of 4.27 in 2023 (down slightly from 4.31 in 2021) with 83% indicating they felt Confident/Very Confident.
- *Believing Metro will take appropriate action:* Mean score of 3.87 in 2023 (down from 4.29 in 2021) with 69% indicating they felt Confident/Very Confident.
- *Trusting they can make a report without encountering retaliation:* Mean score of 4.06 in 2023 (down from 4.22 in 2021) with 76% indicating they felt Confident/Very Confident.

Harassment, Discrimination, or Unethical Behavior reporting:

- *Knowing how to report:* Mean score of 4.17 in 2023 with 81% indicating they felt Confident/Very Confident.
- *Believing Metro will take appropriate action:* Mean score of 3.56 in 2023 with 59% indicating they felt Confident/Very Confident
- *Trusting they can make a report without encountering retaliation:* Mean score of 3.73 in 2023 with 66% indicating they felt Confident/Very Confident

Mean Reporting Confidence

As mentioned above, confidence mean scores were created across 1) all reporting topics, and 2) across only discrimination, harassment, or unethical behavior items. These mean scores allow us to get a sense of overall employee confidence. See Tables 8, 9, and 10 for these overall reporting confidence mean scores for the agency, by department, and by demographics categories.

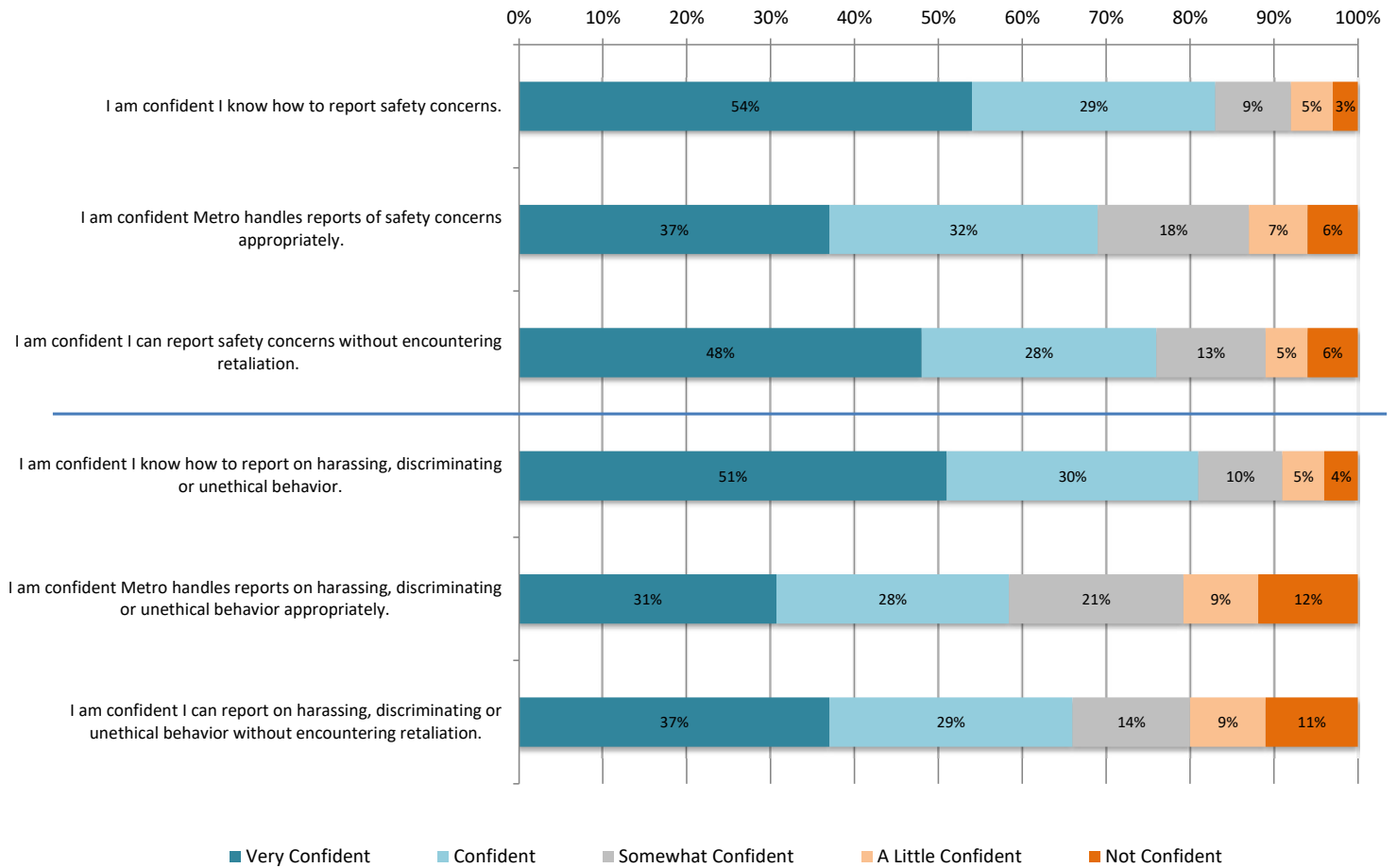
Overall reporting confidence increased from a 3.91 mean score in 2021 to 3.94 in 2023. DEI-focused reporting confidence decreased slightly from 3.91 in 2021 (mean score focused on discrimination and harassment only) to 3.82 in 2023 (mean score focused on discrimination, harassment, and unethical behavior). These findings suggest little change in the past two years, and there is still room for improvement, particularly when it comes to reporting confidence for minority and marginalized groups. See page 23 for more information.

Table 8: Reporting Confidence Items (2012 to Present)

	Reporting Confidence Questions	2012	2014	2017	2018	2019	2021	2023	Change 2021 to 2023 (Changes of +/- 0.1 flagged as significant)
Safety	I am confident I know how to report safety concerns. (2023) <i>I am confident I know how to report on physical/safety hazards. (2012-2021)</i>	3.75	3.8	3.72	4.23	4.23	4.31	4.27	-0.04
	I am confident Metro handles reports of safety concerns appropriately. (2023) <i>I am confident Metro takes appropriate action when dealing with problems reported involving physical/safety hazards. (2012-2021)</i>				3.78	3.81	4.29	3.87	-0.42
	I am confident I can report safety concerns without encountering retaliation. (2023) <i>I am confident I could report problems involving physical/safety hazards without encountering retaliation. (2012-2021)</i>				4.12	4.11	4.22	4.06	-0.16
Harassment, Discrimination, or Unethical Behavior	I am confident I know how to report on harassing, discriminating or unethical behavior. (2023)							4.17	-
	I am confident Metro handles reports on harassing, discriminating or unethical behavior appropriately. (2023)							3.56	-
	I am confident I can report on harassing, discriminating or unethical behavior without encountering retaliation. (2023)							3.73	-
Reporting Confidence Aggregates	DEI (Harassment and Discrimination) Reporting Confidence Mean (2018-2021)				3.7	3.68	3.87		-0.05
	DEI (Harassment, Discrimination, or Unethical Behavior) Reporting Confidence Mean (2023)							3.82	
	Overall Reporting Confidence Mean				3.8	3.74	3.91	3.94	0.03
Previously gathered individual harassment, discrimination, unethical behavior data	<i>I am confident I know how to report on harassment. (2021)</i>	4.1	4.1	3.96	4.08	4.05	4.29		
	<i>I am confident I know how to report on discrimination. (2021)</i>				4.02	3.95	4.22		
	<i>I am confident I know how to report on unethical behavior. (2021)</i>				3.95	3.92	4.14		
	<i>I am confident Metro takes appropriate action when dealing with problems reported involving harassment. (2021)</i>				3.49	3.45	3.61		
	<i>I am confident Metro takes appropriate action when dealing with problems reported involving discrimination. (2021)</i>				3.53	3.46	3.66		
	<i>I am confident Metro takes appropriate action when dealing with problems reported involving unethical behavior. (2021)</i>				3.39	3.34	3.5		
	<i>I am confident I can report safety concerns without encountering retaliation. (2021)</i>				3.64	3.58	3.7		
	<i>I am confident I could report problems involving discrimination without encountering retaliation. (2021)</i>				3.65	3.56	3.72		
	<i>I am confident I could report problems involving unethical behavior without encountering retaliation. (2021)</i>				3.53	3.42	3.62		

Figure 1:

2023 Reporting Confidence Items: Metro Agency



Employee Reporting Confidence

Reporting Confidence: Department

This subsection features a brief overview of 2023 reporting confidence (overall reporting confidence and harassment/discrimination reporting confidence) by Department. Departments are ranked in order from highest confidence to lowest confidence.

- Office of Metro Attorney (4.60 Overall, 4.59, DEI)
- Human Resources (4.51 Overall, 4.461, DEI)
- Capital Asset Management (4.48 Overall, 4.40, DEI)
- Information Services (4.29 Overall, 4.23, DEI)
- Portland Expo Center (4.28 Overall, 4.21, DEI)
- Planning, Development and Research (4.25 Overall, 4.23, DEI)
- Portland'5 Center for the Arts (4.18 Overall, 4.10, DEI)
- Council Office/COO/GAPD (4.09 Overall, 4.02, DEI)
- Finance and Regulatory Services (4.06 Overall, 3.95, DEI)
- Waste Prevention and Environmental Services (4.02 Overall, 3.92, DEI)
- Oregon Zoo (3.76 Overall, 3.56, DEI)
- Parks and Nature (3.73 Overall, 3.55, DEI)
- Oregon Convention Center (3.71 Overall, 3.60, DEI)
- Diversity, Equity and Inclusion (3.55 Overall, 3.48, DEI)
- Housing (3.52 Overall, 3.46, DEI)
- Prefer not to respond (3.35 Overall, 3.28, DEI)
- Communications (3.0 Overall, 2.71, DEI)

Table 9: Overall Reporting Confidence and DEI Reporting Confidence Mean Scores by Department

	Overall Reporting Confidence Mean Scores (Full Set) 2018-2021=12 Questions 2023=6 Questions				DEI Reporting Confidence Mean Scores 2018-2021=Harassment and Discrimination 2023=Harassment, Discrimination, & Unethical Behavior			
	2018	2019	2021	2023	2018	2019	2021	2023
Metro Agency Overall	3.79	3.74	3.91	3.94	3.74	3.68	3.87	3.82
Capital Asset Management	-	-	4.34	4.48	-	-	4.37	4.40
Communications	3.78	3.68	3.54	3.00	3.76	3.55	3.43	2.71
Council Office/COO/GAPD	4.01	4.06	3.78	4.09	3.92	3.98	3.72	4.02
Diversity, Equity and Inclusion	-	-	-	3.55	-	-	-	3.48
Finance and Regulatory Services	3.82	3.49	3.93	4.06	3.75	3.33	3.86	3.95
Housing	-	-	-	3.52	-	-	-	3.46
Human Resources	3.88	3.41	4.42	4.51	3.97	3.34	4.49	4.46
Information Services	3.89	4.02	3.84	4.29	3.82	3.98	3.87	4.23
Office of Metro Attorney	4.15	4.17	4.31	4.60	3.97	3.98	4.26	4.59
Oregon Convention Center	3.4	3.51	3.92	3.71	3.37	3.48	3.87	3.60
Oregon Zoo	3.64	3.61	3.7	3.76	3.58	3.56	3.62	3.56
Parks and Nature	3.8	3.84	3.9	3.73	3.75	3.75	3.84	3.55
Planning, Development and Research	4.07	3.74	4.1	4.25	4.03	3.65	4.08	4.23
Portland Expo Center	4.06	4.2	4.44	4.28	4.02	4.17	4.42	4.21
Portland'5 Center for the Arts	3.85	3.99	4.16	4.18	3.82	3.94	4.09	4.10
Waste Prevention and Environmental Services	3.96	3.82	3.91	4.02	3.9	3.75	3.89	3.92
Prefer not to respond	-	-	-	3.35	-	-	-	3.28

Employee Reporting Confidence

Reporting Confidence: Demographic Subgroups

Table 10 on the following page provides demographics-level findings for Metro's two reporting confidence mean scores. Overall Reporting Confidence mean accounts for the reporting of 1) safety concerns or 2) harassment, discrimination, and unethical behavior. Our "DEI Reporting Confidence Mean" covers only a limited set of confidence questions (related to harassment and/or discrimination in 2021; and harassment, discrimination, or unethical behavior in 2023). Subgroups with six or fewer participants were eliminated from analysis to ensure anonymity in reporting. Takeaways and highlights are as follows.

Race/Ethnicity: Both Overall Reporting Confidence and Limited/DEI Reporting Confidence follow the same ranking order for race/ethnicity subgroups: Multiracial (4.22 Overall Reporting Confidence, 4.12 DEI Reporting Confidence), Hawaiian/Pacific Islander (4.13 Overall reporting confidence, 3.95 DEI reporting confidence), White (4.06 Overall Reporting Confidence, 3.95 DEI Reporting Confidence), Asian/Asian American (3.90 Overall Reporting Confidence, 3.75 DEI Reporting Confidence), Hispanic/Latino/a/x (3.87 Overall Reporting Confidence, 3.68 DEI Reporting Confidence), Black or African American (3.86 Overall Reporting Confidence, 3.75 DEI Reporting Confidence), Native American/American Indian (3.37 Overall Reporting Confidence, 3.30 DEI Reporting Confidence). Multiracial, Asian or Asian American, Black or African American, and Hispanic/Latino/a/x employees showed an increase in both Overall Reporting Confidence and DEI Reporting Confidence from 2021 to 2023; whereas Native American/American Indian employees saw a decrease in both reporting confidence measures.

Gender Identity: Men were the most confident in reporting (4.12 Overall, 4.04 DEI Reporting Confidence), followed by women (3.99 overall, 3.87 DEI reporting confidence). Transgender and those marking "gender not listed" reported the lowest confidence (3.5 overall and 3.4 DEI for Transgender employees, 3.18 overall and 3.13 DEI for those marking "gender not listed"). Non-binary employees saw a decrease in reporting confidence from 2021 to 2023 (3.58 overall reporting confidence in 2021 to 3.43 in 2023; 3.39 DEI reporting confidence in 2021, 3.15 in 2023).

Disability: Individuals without disabilities have significantly higher reporting confidence scores (4.10 Overall, 4.00 DEI) compared to individuals with a disability (3.64 overall, 3.45 DEI).

Sexual Orientation: Reporting Confidence Means, ranked highest to lowest by sexual orientation are as follows: Heterosexual (4.07 Overall Reporting Confidence mean, 3.96 DEI Reporting Confidence mean), Bisexual (4.05 Overall, 3.96 DEI), Asexual (3.99 Overall, 3.92 DEI), Gay/Lesbian (3.92 Overall, 3.77 DEI), Pansexual (3.71 Overall, 3.49 DEI), and Sexuality not listed (3.51 Overall, 3.33 DEI). Most sexual orientation subgroups showed either positive change or no change from 2021 to 2023 for reporting confidence. Employees marking "Sexuality not listed" showed a decrease in overall reporting confidence from 2021 (3.94) to 2023 (3.51).

Job Type: Managers/Supervisors indicated higher Overall Reporting Confidence and DEI Reporting Confidence (4.29 and 4.16, respectively) than non-managers/non-supervisors (3.90 and 3.78, respectively). Managers/supervisors saw a slight decrease in DEI-related reporting confidence (4.29 in 2021, 4.16 in 2023).

Employment Status: Variable hour employees who have worked less than 600 hours over the past 12 months indicate the highest Overall Reporting Confidence (4.16) and DEI Reporting Confidence (4.16), followed by Regular/part-time employees (3.94 Overall Reporting Confidence, 3.82 and DEI Reporting Confidence, and Variable hour employees working less than 600 hours a year (3.93 Overall Reporting Confidence, 3.77 DEI Reporting Confidence).

Compensation Status: Salaried employees scored higher in Overall Reporting Confidence (4.12) and DEI Reporting Confidence (4.01) compared to hourly employees (3.84 Overall, 3.71 DEI).

Work Location: Reporting Confidence means, ranked from highest to lowest across four work location categories: Hybrid (4.22 Overall, 4.09 DEI), New employees (4.07 Overall, 3.95 DEI), Remote (4.00 Overall, 3.90 DEI), and Onsite (3.85 Overall, 3.71 DEI).

Table 10: Overall Reporting Confidence and DEI Reporting Confidence Means by Demographics Subgroups

		Overall Reporting Confidence Mean Scores (Full Set) 2018-2021=12 Questions 2023=6 Questions					DEI Reporting Confidence Mean Scores 2018-2021=Harassment and Discrimination 2023=Harassment, Discrimination, & Unethical Behavior				
		2018	2019	2021	2023	Change 2021— 2023 (Changes of +/- 0.1 flagged as significant)	2018	2019	2021	2023	Change 2021— 2023 (Changes of +/- 0.1 flagged as significant)
Metro Agency Overall		3.79	3.74	3.91	3.94	0.03	3.74	3.68	3.87	3.82	-0.05
Race/ Ethnicity	Asian or Asian American	3.56	3.69	3.54	3.90	0.36	3.43	3.61	3.44	3.75	0.31
	Black or African American	3.62	3.95	3.46	3.83	0.37	3.61	3.87	3.36	3.75	0.39
	Hispanic or Latino/a/x	3.79	3.57	3.61	3.87	0.26	3.72	3.48	3.58	3.68	0.10
	Native American, American Indian or Alaska Native	4.33	4.16	3.66	3.37	-0.29	4.33	4	3.65	3.30	-0.35
	Native Hawaiian or Pacific Islander	*	*	*	4.13	*	*	*	*	4.00	*
	White	3.88	3.87	4.05	4.06	*	3.84	3.82	4.02	3.95	-0.07
	I identify with more than one option listed	3.82	3.58	3.82	4.22	0.40	3.71	3.46	3.74	4.12	0.38
	Prefer not to respond	3.21	3.1	3.51	3.25	-0.26	3.15	3.03	3.44	3.09	-0.35
Gender Identity	Women	3.76	3.75	3.87	3.99	0.12	3.7	3.65	3.83	3.87	0.04
	Man	3.95	3.92	4.09	4.12	0.03	3.92	3.9	4.06	4.02	-0.04
	Non-Binary gender, genderqueer or third gender	3.41	3.53	3.58	3.43	-0.15	3.29	3.36	3.39	3.15	-0.24
	Transgender	*	*	*	3.50	*	*	*	*	3.40	*
	Gender not listed	*	*	*	3.18	*	*	*	*	3.13	*
	Prefer not to respond	3.14	3.02	3.5	3.25	-0.25	3.1	2.94	3.44	3.11	-0.33
Disability	Yes	3.7	3.51	3.6	3.64	0.04	3.57	3.44	3.47	3.45	-0.02
	No	3.49	3.48	3.99	4.10	0.11	3.44	3.35	3.96	4.00	0.04
	Prefer not to respond	3.5	3.29	3.45	3.43	-0.02	3.43	3.2	3.39	3.31	-0.08
Sexual Orientation	Asexual	3.94	3.67	3.52	3.99	0.47	3.95	3.62	3.51	3.92	0.41
	Bisexual	3.57	3.64	3.98	4.05	0.07	3.53	3.53	3.9	3.96	0.06
	Gay/Lesbian	3.84	3.84	3.81	3.92	0.11	3.77	3.76	3.78	3.77	-0.01
	Heterosexual	3.91	3.88	4.04	4.07	0.03	3.86	3.83	4.01	3.96	-0.05
	Pansexual	3.01	3.12	3.33	3.71	0.38	2.77	2.96	3.23	3.49	0.26
	Sexuality not listed	3.89	3.7	3.94	3.51	-0.43	3.87	3.52	3.85	3.33	-0.52
	Prefer not to respond	3.41	3.35	3.55	3.52	-0.03	3.36	3.27	3.48	3.36	-0.12
Job	Manager/Supervisor	4.28	4.14	4.32	4.29	-0.03	4.26	4.12	4.29	4.16	-0.13
	Non-Manager/Non-Supervisor	3.66	3.64	3.83	3.90	0.07	3.61	3.57	3.78	3.78	0.00
	Prefer not to respond	-	-	2.94	3.29	0.35	-	-	2.94	3.16	0.22
Employment Status	Regular or Part-time employees who have worked at least 600 hours over the past 12 months	3.78	3.71	3.92	3.94	0.02	3.73	3.64	3.88	3.82	-0.06
	Variable hour employees who have worked more than 600 hours over the past 12 months	3.77	3.76	4.05	3.93	-0.12	3.73	3.7	3.99	3.77	-0.22
	Variable hour employees who have worked less than 600 hours over the past 12 months	3.88	3.94	4.01	4.16	0.15	3.83	3.89	3.95	4.16	0.21
	Prefer not to respond	-	-	3.48	3.57	0.09	-	-	3.46	3.48	0.02
	Hourly	3.6	3.66	3.79	3.84	0.05	3.56	3.59	3.74	3.71	-0.03
	Salaried	4.05	3.88	4.08	4.12	0.04	4.01	3.82	4.05	4.01	-0.04
	Prefer not to respond	-	-	2.9	3.25	0.35	-	-	2.81	3.09	0.28
Remote/ Onsite	Onsite, at one of Metro's facilities	-	-	3.83	3.85	0.02	-	-	3.76	3.71	-0.05
	Remote, not at a Metro facility	-	-	3.99	4.00	0.01	-	-	3.96	3.90	-0.06
	I evenly split my time between working remotely and from onsite	-	-	3.86	4.22	0.36	-	-	3.78	4.09	0.31
	I did not work here last year	-	-	4.03	4.07	0.04	-	-	4.08	3.95	-0.13
	Prefer not to respond	-	-	3.02	3.78	0.76	-	-	2.91	3.79	0.88

Section 3:

Qualitative Findings

The 2023 Employee Engagement Survey had four open-ended questions, which allowed individuals to provide additional feedback on employee engagement suggestions, DEI challenges, DEI accomplishments, and DEI actions. Qualitative coding was completed in order to better understand general feedback themes and ideas. Open-ended responses are redacted to exclude any feedback that names individuals or identifies them by specific title/details.

Please provide us with any additional suggestions you have for increasing employee engagement here at Metro.

Table 11: Text Analysis

<i>Please provide us with any additional suggestions you have for increasing employee engagement here at Metro.</i>	Percent	Count
Improve Work Culture	20.60%	82
More Interaction through Events and Activities	19.50%	78
We Need a Sense of Unity/Too Much Division	17.80%	71
More Communication	16.30%	65
Need Stronger/Better Leadership	10.00%	40
More Recognition, Praise, and Inclusion	7.50%	30
More/better training/learning	7.30%	29
Better implementation of DEI work	6.00%	24
Need more Resources (support, finances, positions)	5.80%	23
We Need to Return to the Office	5.00%	20
Better Hiring Practices	4.30%	17
More Personal Development and Education Opportunities	4.00%	16
Need Less Emphasis on DEI	3.50%	14
Need Better Work/Life Balance	3.30%	13
Include Variable Hour Staff in Engagement Efforts/Services	3.00%	12
Better Reporting System Ensuring Safety and Accountability	1.50%	6
No suggestions- happy with DEI work	4.80%	19
Don't know/unsure	5.30%	21
N/A	7.50%	30

Key Takeaways

One in five comments (20.6%) wished to see an improvement in Metro's company culture. Additionally, 19.5% of comments related to a wish for more interaction with peers across departments and levels via events and activities. 17.8% focused on creating a sense of unity and overcoming barriers that divide Metro, and 16.3% of comments focused on a need for more communication. For example:

- *Listen to people of color, listen to women. Zero tolerance for workplace and sexual harassment and the "boys" club mentality.*
- *By fostering a culture of continuous learning and professional development, we can enhance employee engagement and overall organizational success.*
- *Require that departments/managers/supervisors connect regularly with their teams both in-person and hybrid. Establish a committee focused on workplace culture. Empower engagement team members to help lead engagement in their departments.*
- *Additional on site opportunities for staff to engage with leadership and build relationships and trust with leaders outside of their immediate circle will be invaluable in building a culture of accountability where staff feel empowered to take concerns to management and leadership. There are few resources for staff who are having issues with their immediate managers and don't have those connections to leadership beyond those managers and it's difficult to make sure that retaliation is not occurring in the form of reduced hours.*
- *Allocate resources judiciously, initiate true collaboration, and dissolve barriers. Only then can Metro overcome these frustrations, galvanize its workforce, and propel progress.*
- *I think it would be great to celebrate more employee work and functions across all of the departments. There are some teams I hear very little from or about and it would be great to magnify those voices and the importance of that work. I would also like more options to meet and collaborate with employees in other departments and groups in informal and fun settings.*

What do you believe Metro’s greatest accomplishment has been in reaching goals related to DEI?

Table 12: Text Analysis

<i>What do you believe Metro’s greatest accomplishment has been in reaching goals related to DEI?</i>	Percent	Count
Praise for Strategy and Commitment	27.50%	140
Great DEI Training/Education	23.10%	118
Nice Hiring Practices	20.60%	105
Specific Approval of Metro DEI Policy or Staff Member	20.00%	102
Negative Feedback	10.60%	54
Creating Positive Cultural Change at Metro	5.90%	30
Dedicated Resources for DEI	4.70%	24
Community Outreach	4.50%	23
Communication, Listening, and Valuing Feedback	4.30%	22
Don't know/unsure	11.40%	58
N/A	4.50%	23

Key Takeaways

Employees are taking notice of Metro’s DEI efforts, with 24.9% of comments providing general praise for DEI’s commitment to strategic DEI work, and 23.1% of comments praising DEI training and education efforts. Additionally, 20.0% of comments provided praise for specific Metro DEI policies or staff members. For example:

- *I really think that the strategy has been helpful to employees that are interested in forwarding the work and I think there have been really great training opportunities provided to really support that as well.*
- *Setting goals at a time when not many public agencies had made strong commitments to advancing DEI, back when the SPAREDI was approved. Metro has also made progress in advancing DEI internally by creating ERGs and other actions*
- *Clear changes to recruiting processes for the long term are evident and show a real commitment to working to reach and recruit from a variety of communities and backgrounds. We aren’t getting it 100% right yet, but the process has seen major changes and improves with time.*
- *Metro has been great about educating employees on DEI! I’ve learned a lot and so have coworkers, and we can talk about things openly and gracefully, thanks to a lot of the trainings opening those doors and starting those conversations.*
- *Integrating policy values like centering the voices of BIPOC and underrepresented communities into program decisions and implementation i.e. Parks and Nature Bond, SHS local implementation plans.*
- *While only being able to speak for DEI at the Zoo, the ZAP program seems like the most tangible and least performative DEI accomplishment.*

What do you believe Metro's greatest challenges are in achieving goals related to DEI?

Table 13: Text Analysis

<i>What do you believe Metro's greatest challenges are in achieving goals related to DEI?</i>	Percent	Count
Leadership and Follow-Through	31.50%	165
Keep in mind Outside Influences	26.00%	136
Recruitment/Hiring/Retention	21.90%	115
DEI needs more Consistency and Coordination	17.20%	90
Bias/Discrimination/Exclusion	16.80%	88
Need More Training or Different/Better Training	16.40%	86
Negative feedback, in general, for DEI	10.30%	54
Need for Stronger Community Outreach	4.00%	21
Need Stronger Staff Buy-in, Safety, and Understanding	3.40%	18
Need to move faster	1.30%	7
Don't know/unsure	5.70%	30
N/A	4.20%	22

Key Takeaways

When asked to identify Metro's greatest challenge in achieving DEI goals, 31.5% of comments focused on the need for more leadership follow-through, less talk and more action, and stronger agency-level and department-level leadership. Additionally, 26.0% thought the greatest challenge to Metro's DEI goals were outside influences beyond Metro's control, including Portland not having a very diverse applicant pool, and systematic biases and stereotypes that get in the way of employee support of DEI initiatives. 21.9% discussed the challenges of recruiting diverse candidates, increasing diverse hiring, and retaining diverse hires. For example:

For example:

- *Not all managers are aware of the goals and do not keep them in mind during recruiting and/or communicating to employees.*
- *Metro's culture is very performative and centered around Portland politeness. This means that folks focus mostly on thinking or talking about DEI, but not actually implementing or doing. Furthermore, there are a lot of discretionary opportunities for management and leadership to interpret policies through a white supremacist lens and not carry out the DEI policies.*
- *Holding [redacted] leadership accountable because MERC isn't doing it. Are they holding to Metro's values? NO! I know three co-worker who are being bullied, intimidated and harassed for speaking out and they all are people of color.*
- *Follow-up and follow-through of feedback loops communicating out metro's progress on achieving goals, the steps being taken, decisions being made. Increased communication that allows us to feel like we are all moving together in this work.*
- *Metro is unwilling to hold leadership accountable for its DEI deficits and harmful practices.*
- *Unrealistic about the Portland market's ability to provide a diverse workforce or resource with the proper training and/or abilities. Goals with escalating metrics haven't been re-assessed post-COVID to account for shifts in the workforce and Portland market, thereby making it appear we may be underperforming.*
- *Helping everyone understand the importance of these goals and not alienating those who are not part of a marginalized community*
- *Instituting career development tracks rather than just offering jobs.*
- *Creative approaches to hiring a more diverse workforce. Where we post things, how we word job descriptions, and who is on the panel could be looked at especially for higher level positions.*

Please share one action you believe Metro needs to take to better address DEI moving forward

Table 14: Text Analysis

<i>Please share one action you believe Metro needs to take to better address DEI moving forward</i>	Percent	Count
Show Us: Stronger Measurements, Clarify Goals, Share Successes	15.50%	74
Need for Additional/Mandatory Training and Events	14.30%	68
Need for better Recruitment/Hiring/Retention Practices	14.30%	68
Employee Offered Own Unique Suggestions	13.00%	62
Need to get back to some DEI Foundational/Fundamentals	11.60%	55
Need More Listening and Inclusion of All Groups at the Table	9.20%	44
Need to Increase Funding, Support, and Reach	9.20%	44
Fix Company Culture/Fear of Retaliation	9.20%	44
Less Talk, more Action from All (Including Leadership)	7.80%	37
Need to open DEI up beyond Race/Avoid Exclusion	6.10%	29
Negative, in general (i.e. too much DEI focus, dislike DEI-centered hiring, etc.)	5.30%	25
Need more/Better Community Outreach	4.00%	19
No Advice/All is going well	3.40%	16
Greater Focus on Services for Part-Time/Temp Employees	2.50%	12
Don't know/unsure	8.00%	38
N/A	5.70%	27

Key Takeaways

When asked to share one action they believe Metro needs to take to better address DEI moving forward, the responses were in line with the most commonly reported accomplishments and challenges. 15.5% expressed wanting to see stronger measurements, clearer goals, and sharing success stories of Metro DEI initiatives to better see progress. 14.3% focused on wanting to see Metro instate better recruitment, hiring, and retention practices, and 14.3% indicated a wish for more training events (and the desire to make this training mandatory). For example:

- *1) drawing connections from broader, agency-wide goals and outcomes to individual team's work and goals, and determining what compliance looks like for staff and leadership so as to provide progress markers; 2) holding teams and leadership accountable to those goals; 3) being transparent when individuals, teams, or divisions do not meet DEI goals or show satisfactory progress; 4) ensure critical DEI work is done with or lead by folks who have relevant experience in DEI.*
- *Measurable targets for progress for departments and deadlines to meet those targets*
- *Further expand recruitment strategies that encourage applicants of diverse backgrounds to apply. For example, recruiting in non traditional spaces, providing more training opportunities for staff to build upon interviewing skills or receive job coaching. Provide more job shadowing opportunities, particularly for frontline staff.*
- *Prioritize retention over recruitment. address inequity of pay for bipoc managers. i am not a manager but this inequity ensures that I will not apply for a management position. even if this is out of Metro's direct control, metro should be advocating statewide to address this.*
- *Metro is FAR more progressive than any other workplace I have experienced when it comes to gender inclusion (THANK YOU), however, I would like to see more progress made toward inclusivity to it's LGBTQ employees and community. Specifically, trainings and resources regarding unconscious bias toward gender identity, and sexual orientation. And addressing assumptions and stereotypes (whether conscious or unconscious) about gender expression.*
- *More mandatory DEI related training, especially in-person meetings because they have a bigger impact than online courses alone.*
- *More mandatory participation in workshops and team-by-team development based trainings*
- *Offer more training and information about "white fragility". I have noticed that many people verbally and (I believe) sincerely support DEI but are not prepared for what that looks like in the workplace. How that will impact their position, teams, etc...*

Section 4:

Key Themes

The 2023 Employee Engagement Survey produced another insightful, thoughtful set of Employee Engagement and DEI-focused data, both in the form of rich Agency- and Department-level quantitative data and enlightening qualitative data. The 2023 data represent 920 respondents, a majority of which completed the five open-ended survey items. This section attempts to boil this data down to four key Employee Engagement and DEI themes illuminated by the 2023 Survey.

This section will discuss four themes that were consistent throughout the data. These themes are not presented in any priority order:

Theme 1: Qualitative data suggest two compelling messages:

- When employees were asked about how Metro can improve engagement, addressing work culture and internal division were top-of-mind.
- Employees are hungry for more/different interactions and collaboration; while not every employee wants to have a best friend at work, the data suggest a desire to engage with each other and build relationships.

Theme 2: The data show unique findings for three key groups: remote/hybrid workers, onsite workers, and variable hour employees (working 600+ hours per year). This theme will explore the way engagement looks for these two groups.

Theme 3: In the past year, Metro made some strong gains in employee engagement, management, and development metrics, but there's still room for improvement

Theme 4: There appears to be some division about DEI, with more employees asking for either A) increased accountability or B) less DEI work.

Theme 1:

Qualitative data suggest three key messages:

- **When employees were asked about how Metro can improve engagement, addressing work culture and internal disconnects were top-of-mind.**
- **Employees are hungry for more/different interactions and collaboration; while not every employee wants to have a best friend at work, the data suggest a desire to engage with each other and build relationships.**
- **Employees are eager for pathways to become more closely involved in Metro's DEI work.**

At the end of the Employee Survey, employees were asked to provide additional suggestions for increasing employee engagement at Metro. The comments supplied there were coded by theme, redacted for identifying information, and are presented in this report in **Section 3: Qualitative Findings** and **Section 6: Full Qualitative Feedback**. For this question, many employees spoke to a desire for more improvements in workplace culture and conditions, as well as a desire for more/better interactions and relationship building in the workplace.

Of all employee comments, 20.6% of comments suggested improving workplace culture (compared to 15% in 2021), with 19.5% of comments specifically focused on a desire for more interaction with events and activities (compared to 15% in 2021). While in 2021, 1.2% of comments suggested a need for Metro to demonstrate more unity and less division, 17.8% of comments in 2023 suggest this theme.

We see this focus on work culture/conditions and engagement/relationship building across all race/ethnicity groups. About one in five Black/African American, Asian/Asian American, Native American/American Indian/Alaska Native,

Hawaiian/Pacific Islander, and Multiracial employee comments mentioned a need for more unity/less division (about 3% higher than White/Hispanic employees); while 1 in 4 employee of this race grouping suggested a need for more interactions through events, activities, and collaboration with other departments (about 8% higher than White/Hispanic employees).

Quantitative data align with these as quantitative findings as well. The Gallup **Best Friend at Work** item was the only Q12 item to show a decrease from 2021 (3.20) to 2023 (3.16). While both quantitative and qualitative data show employees have good access to, and perceptions of, DEI-related training, the open-ended feedback suggest employees are hungry for more interactions outside of DEI trainings and professional development.

Examples regarding Work Culture/Conditions feedback:

- *Staff here are incredibly passionate, but that can lead to overworking and burnout if we don't have a culture of work life balance. We have the tools in place, but not always the encouragement needed to use them.*
- *Safe spaces ought to mean that no one is tracking the discontented or the disenfranchised, and that when someone speaks up with a dissenting voice they are welcomed into the conversation as essential to the curing process of our collective improvement. Having dangerous or problematic information in a climate of fragility is stressful and un-nerving. Public agencies are far too often engaged in journeys of disappointment embarked upon by coalitions of the willing, led by people with best intentions who aren't willing to accept responsibility for the negative consequences of their supposed altruisms. "Do not print, store or copy this page," is a sinister way to end a difficult conversation and represents a truth that the individual is not protected from the institution.*
- *We need to not fill up all 40 hours of non-salaried staff's time. We need to prioritize connection to each other, the agency, etc. Let's make a commitment to frontline staff.*
- *Employee engagement can be fostered through greater ability to collaborate and individual autonomy in the workplace. Supervisors seem to be the biggest hurdle to change and engagement. Employees with greater autonomy to make changes in their work and "play with" ideas while trying them out in practice would improve how engaged we are with the work we do. In my own experience, my ideas have been shot down because of a fear that they might make others upset - those concerns are legitimate, and I should learn to better collaborate my work, but perhaps there's a way to create a playground where I can try out ideas without it impacting others immediately.*
- *Following our own approach to public engagement and making sure there is meaningful participation and engagement with employees that frames decision-making- like when thinking about how the office is remodeled and how we think about returning to the office (there are so many other ways to do this besides an arbitrary one day a week mandate for example that are more intentional/beneficial). Would also again say making sure employees aren't under water with work so there is time and space to engage too. That's only going to increase as we also start facing the outside pressures that are coming from rapidly rising inflation that have unfortunately erased the gains from the last contract.*
- *Increasing compensations across all employee categories proportionate to increases in the cost of living/interest rates/inflation so that we can continue to live in the communities that we serve.*

Examples regarding Employee Relationship Building/Interaction/Engagement:

- *Any continued assistance with building teams connections with one another, that includes helping managers build relationships within their own programs and outside of them.*
- *Metro is very siloed. There need to be more cross departmental teams and engagement opportunities during work hours.*
- *Remote employees should have the opportunity to work with team mates when performing tasks. Meet together to do tasks, not just a monthly or quarterly team meetings. Having more time together with collaboration on duties and using the time to develop skills and discuss ways to be more efficient. Accountability of communication should be a priority.*
- *Dept/site specific engagement like a BBQ, or Picnic, group gatherings that might be more informal for folks to get to engage each other in conversation.*
- *More opportunities that aren't so extrovert-forward like stressful large participatory group activities for engagement, but maybe some smaller, more self-selected opportunities to engage and make connection.*
- *Regular all staff meetings focused on instilling shared purpose (all Metro). Team engagement training for managers. Require that departments/managers/supervisors connect regularly with their teams both in-person and hybrid. Establish a committee focused on workplace culture. Empower engagement team members to help*

lead engagement in their departments.

- *I think more strategic in-person activities would be nice. I like the flexibility of remote work, but I also miss seeing my coworkers in-person. I don't want a mandatory return to office, but I would love to see more people in-person. Work is my primary source of socialization/interacting with folks I know/am friendly with, so while working remotely, it is very easy for me to not see people I know/am friendly with in-person for 3 - 4 days in a row.*
- *I think it would be great to celebrate more employee work and functions across all of the departments. There are some teams I hear very little from or about and it would be great to magnify those voices and the importance of that work. I would also like more options to meet and collaborate with employees in other departments and groups in informal and fun settings.*
- *Create more opportunities for collaboration and meeting people from other departments. For example, more lunch and learn opportunities about work in different parts of the agency, not just showing the good things, but also discussing challenges and learning opportunities. Could record presentations so that they are available to staff who are unable to attend or listen in. Even better: more lunch and learn events presenting the results and challenges of applying a racial equity lens to x and y program or policy.*

Examples regarding eagerness for pathways to become more closely involved in Metro's DEI work.

- *1) drawing connections from broader, agency-wide goals and outcomes to individual team's work and goals, and determining what compliance looks like for staff and leadership so as to provide progress markers; 2) holding teams and leadership accountable to those goals; 3) being transparent when individuals, teams, or divisions do not meet DEI goals or show satisfactory progress; 4) ensure critical DEI work is done with or lead by folks who have relevant experience in DEI.*
- *Focus on the totality of our constituents by engaging with other public works agencies in an open dialogue of what we need to work on together. A greater representation of our communities, clear access to affordable housing for our work force. The affect of gentrification has disproportionately affected BIPOC public employees from being able to afford to live in the communities of which they serve. There needs to be a study as to who and why public employees are not allowed to live in the communities of which they serve. This is a matter of building stronger communities of which our constituents can feel they are serviced and our colleagues can engage in a better work life balance.*
- *Require committees, advisory groups, etc. have representation from BIPOC/LGBTQI staff or if public, members of the public.*
- *The required online trainings were too basic to be of value. Many Metro employees are looking for meaningful ways to advance DEI and the trainings were not a good use of time.*
- *Being a white person, I don't feel there is an avenue that is clear for me to take to actively participate and help achieve meaningful goals. I can read and learn, but I am not always sure how I can translate that into my daily work.*
- *Of a department that is seemingly growing each year, there seems to be little direct face to face engagement w/ people at our facility. On-line classes/trainings are a great introduction to DEI import and simple steps for staff to engage in. But skilled and direct interaction/trainings directly w/ staff on 'real world' practice and techniques to enhance their day-to-day growth are rare.*

Theme 2:

Metro appears to be successfully building out the hybrid experience:

- Remote and hybrid employees are highly engaged, and hybrid employee engagement has increased substantially since 2021.
- On-site employee engagement increased as well, although overall engagement was lower than remote and hybrid employees.
- Engagement data for variable-hour employees (working more than 600 hours per year) continued to decrease from 2021 to 2023.
- Data for other subgroups showed some improvement from 2021.
- Engagement looks different for each group, and may require tailored approaches to address the needs of different employees across the organization.

Differing Engagement for Remote/Hybrid and Onsite employees:

Both 2021 and 2023 data demonstrate that remote and hybrid workers are more engaged than onsite workers. With the shifts of more workers to onsite or hybrid work, the 2023 data show some interesting insights that might allow Metro to pinpoint better support for employees based on where they work.

In 2023, remote and hybrid workers showed significantly higher Q12 engagement scores in comparison to onsite workers (4.16 mean Q12 score for remote workers, 4.09 for hybrid, and 3.92 for onsite), and all work location subgroups demonstrated an increase in Q12 engagement mean scores from 2021 to 2023. Hybrid workers showed the most significant positive changes across Gallup's Q12 scale items, for DEI items, and for reporting confidence items from 2021 to 2021. With more employees working in a hybrid capacity, these increases are great news for Metro, and speak to some success in building engagement for hybrid workers.

Q12 items where hybrid employees showed significant increases for Q12 items included increases for **Overall Satisfaction** (3.58 mean in 2021, 4.02 mean in 2023), **Materials and Equipment** (3.87 in 2021, 4.30 in 2023), **Opportunity to Do Best** (3.58 in 2021, 4.06 in 2023), **Opinions Count** (3.67 in 2021, 4.08 in 2023), **Mission/Purpose** (3.33 in 2021, 4.28 in 2023), **Commitment to Quality** (4.08 in 2021, 4.49 in 2023), **Best Friend at Work** (2.83 in 2021, 3.28 in 2023), **Progress** (3.5 in 2021, 3.93 in 2023), and **Learn and Grow** (3.52 in 2021, 4.18 in 2023). Hybrid employees saw significant increases in 7 of 12 DEI items as well.

It's important to note that the number of employees reporting hybrid work has significantly increased from 2021 to 2023, so these comparisons are not looking at a true apples-to-apples populations. That said, these data suggest some fine improvements for the hybrid experience for Metro employees and it will be interesting to see how this hybrid group of employees continues to show up in terms of engagement and interaction with DEI. Likewise, as organizations across the United States are working to make the best hybrid work environments they can (environments that work both for employees and the organization), it is interesting to note that Metro appears to be doing well here.

If hybrid is a future that Metro is committed to, the organization might choose to take a closer look at how they can improve the hybrid work experience for the following Q12 areas: **Know What's Expected**, **Recognition**, **Cares about Me**, and **Development** — four Q12 items that showed little/no change or negative change from 2021 to present. These could potentially be areas in which Metro could work to improve its hybrid experience. All four of these areas speak to building strong onboarding systems, stronger employee/manager communication and feedback loops, and stronger attention to making sure hybrid employees aren't missing out on development opportunities.

In contrast, Metro employees working **onsite** continue to indicate the lowest Q12 engagement of all work location types — scoring 3.74 for the Q12 overall engagement mean, compared to 4.16 for remote workers, 4.09 for hybrid workers, and 4.21 for new employees who did not work at Metro in the past year. That said, this group (along with all other subgroups) saw an increase in Q12 engagement, with their score increasing from 3.59 in 2021 to 3.74 in

2023. Despite this small (but significant) increase in overall engagement, onsite employees saw little change in data for many individual Q12 items, for DEI items, or for reporting confidence items.

Onsite employee's most significant positive changes for the Q12 scale were for **Progress** (3.15 in 2021, 3.51 in 2023) and **Learn and Grow** (3.29 in 2021, 3.70 2023). When we look at Gallup's benchmarking, onsite employees are scoring particularly low for the items **Know What's Expected of Me**, **Opportunity to Do Best**, and **Learn and Grow** -- all of which scored low in the 23rd percentile of the overall Gallup database. These low-performing items suggest that stronger management support and involvement, as well as employee development, could benefit this group of employees.

Likewise, it's interesting to note that onsite employees reported low scores (3.31 in 2023) for the additional engagement question **I have confidence that my department has the leadership in place to be successful**. When we consider this item with other management-related items, these data suggest employees could benefit from greater opportunities to get to know their leaders and stronger communication about the work being done at Metro and in their departments. Managers might also need management training to meets the needs of onsite employees working in post-pandemic times. As one onsite employee wrote when asked to provide advice about employee engagement, onsite employees can perceive a difference in the way they are engaged or treated:

We as an organization need to take care of our working class employees and what would traditionally labeled as "blue collar workers". We need to stop hiring variable hour employees and create permanent benefitted part-time, seasonal, and full-time positions. Because our work force is made up of community members, so when we prioritize them we prioritize our community.

To better engage onsite employees, consider ways to engage them differently in a way that meets them where they work onsite.

Variable Hour Employees (600+ hours) Employee Engagement Insights:

Gallup's Q12 **Overall Satisfaction** score for variable-hour employees working more than 600 hours (referred in this Key Themes section as "VHE 600+") has been steadily decreasing since 2019 (3.97 in 2019, 3.7 in 2021, 3.54 in 2023). Individual Q12 items have also been steadily trending downward from 2019 to present include the following: **Recognition and Praise** (3.64 in 2019, 3.55 in 2021, 3.35 in 2023), **Development** (3.83 in 2019, 3.76 in 2021, 3.60 in 2023), **Opinions Count** (3.55 in 2019, 3.38 in 2021, 3.29 in 2023), and **Learn and Grow** (3.70 in 2019, 3.50 in 2021, 3.33 in 2023). Of these flagged decreases, the most significant from 2021 to 2023 for VHE 600+ employees were the following: **Recognition** and **Progress**.

That said, VHE 600+ employees did show increases for additional engagement items like **I have enough flexibility in my job to maintain work/life balance**, and **In general, the amount of work I am asked to do is reasonable**. The mean scores for these two questions were higher than Part Time/Full-time employees, which suggest that VHE 600+ employees appreciate the workload/flexibility of their job.

VHE 600+ employee data also showed interesting changes overtime in DEI data. VHE 600+ employee data showed decreases from 2021 to 2023 in 10 of 13 DEI items (the greatest number of decreases across all employee status groups). Of the decreases flagged, the most significant DEI decreases from 2021 to 2023 for this group were as follows: **Metro clearly communicates the importance of diversity, equity and inclusion (DEI) to the agency's mission**, **My department's leadership actively engages in advancement of DEI strategies**, **DEI is a high priority for Metro**, and **There is a clear strategy to work on DEI within Metro**.

A working theory about the VHE 600+ experience could be that these employees might be devoting significant time to Metro, but might not quite be feeling fully "looped in," engaged, or developed at the same level of regular or part-time employees. Good first steps for Metro could be to identify who these employees are and understand the role they play in Metro's operations, and then build a plan for engaging them more specifically. As with onsite employees, the VHE 600+ data suggest that these employees are being engaged differently in a way that is not landing well with them. If Metro can find these employees and meet them where they are, the data could shift in the 2025 survey.

Theme 3: **Kudos to Metro, in particular, for gains in the realm of professional development and employee autonomy.**

- **Metro has some room to grow when it comes to setting clear work expectations; a return to improving onboarding systems, job descriptions, and ongoing goal setting could be helpful.**

Engagement in general increased across the Q12 scale and Metro's own engagement items, particularly for survey items related to management and development. In addition to agency-level positive change, many Metro demographics groups saw positive changes as well. This key theme will focus on notable areas of improvement for engagement, and areas of continued opportunity for focused work.

First, let's take a look at the biggest changes from 2021 to 2023 that stood out in the analysis:

- **Overall Q12 Agreement Mean**
 - 3.83 mean in 2021, 3.92 mean in 2023
 - Significant increases of .1 or more for Asian/Asian American employees, Hispanic/Latino/a/x employees, Native American/American Indian/Alaska Native employees, White employees, and Multiracial employees. Note: Black/African American employees saw a small increase from 3.78 to 3.81 for overall Q12.
 - Increased Q12 mean scores for women employees, asexual employees, pansexual employees, regular/part-time employees, variable hour (less than 600 hour) employees, and employees of all work locations
 - Some decreases noted for: non-binary gender, gender queer, or third gender employees and those who marked "sexuality not listed" for their sexual orientation
- **At work, I have the opportunity to do what I do best every day.**
 - 3.70 in 2021, 3.92 in 2023
 - Marked increase for Hispanic/Latino/a/x and multiracial employees, women employees, asexual employees, gay/lesbian employees, and pansexual employees, hybrid work location employees, and new employees
 - There were no marked decreases for any subgroup for this item.
- **There is someone at work who encourages my development.**
 - 3.82 in 2021, 3.93 in 2023
 - Marked increases for Native American/American Indian/Alaska Native employees, Hispanic/Latino/a/x employees, asexual employees, and pansexual employees
- **In the last six months, someone at work has talked to me about my progress.**
 - 3.50 in 2021, 3.76 in 2023
 - Marked increases for Asian/Asian American employees, Hispanic/Latino/a/x employees, women, asexual and pansexual employees, and onsite and hybrid employees
- **In the last year, I have had opportunities to learn and grow.**
 - 3.72 in 2021, 3.94 in 2023
 - Marked increases for Asian/Asian American employees, Hispanic/Latino/a/x employees, women, asexual and pansexual employees, and onsite and hybrid employees

There were also positive changes in additional employee engagement items such as:

- **I have enough flexibility in my job to maintain work/life balance.**
 - 3.90 in 2021, 4.07 in 2023
 - Marked increases for Black/African American employees, Asian/Asian American employees, multiracial employees, and all work locations
- **In general, the amount of work I am asked to do is reasonable.**
 - 3.53 in 2021, 3.89 in 2023
 - Marked increases for Hispanic/Latino/a/x employees, remote workers, and onsite workers.

These positive improvements aside, the following are general engagement areas related to management and development that continue to present opportunities for improvement:

- It is worth noting that **Black/African American engagement** metrics generally showed little movement from 2021. Given the positive changes seen for other groups, and the fact that engagement data fell significantly for this employee group from 2019-2021, there is opportunity to continue working on boosting engagement here.
- In Gallup's benchmarking for **Q01: I know what is expected of me at work**, Metro as an agency is ranked in the 26th percentile. While Gallup's overall database is made up on both private and public businesses, and therefore

not directly comparable, this low benchmark speaks to room for improvement, perhaps through stronger onboarding, goal-focused performance reviews and check-ins, and more clear job descriptions and instructions.

Theme 4: Quantitative results for DEI remained fairly consistent from 2021. However, qualitative results indicate a range of awareness and individual experience in this work while other Metro employees raised a range of challenges regarding Metro's prioritization of DEI.

- **There needs to be a continued investment in training, coaching, communication and leadership modeling of DEI as a priority.**

DEI quantitative data showed little change from 2021 to 2023, but qualitative sentiment from 2021 to 2023 suggest that employees might have increasingly different opinions about DEI initiatives.

The Overall DEI Agreement Mean score for both 2021 and 2023 was 3.77, and most of Metro's 13 DEI-centered items saw no significant change. Two items showed a positive increase: **Metro measures its progress on DEI effectively to improve its performance** (3.15 in 2021, 3.25 in 2023), and **I feel informed about important issues at Metro** (3.52 in 2021, 3.89 in 2023). Two items showed a significant decrease: **DEI is a high priority at Metro** (4.30 in 2021, 4.13 in 2023) and **I have clear and accessible avenues to get involved in work to advance DEI** (3.81 in 2021, 3.71 in 2023). For the latter question, Black/African American, Asian/Asian American, and Hispanic/Latino/a/x employees showed demonstrable decreases as well. DEI sentiment for those marking "prefer not to respond" to the race/ethnicity question showed marked decreases for 11 of 13 DEI items.

Likewise, there were some interesting shifts in thematically coded comments from the survey's three DEI-centered open-ended questions. Namely, there was an increase in negative feedback regarding DEI, and also a continued high number of comments about the need for more DEI (particularly more leadership follow-through). A look at some coded themes for each of the three DEI questions:

Regarding Metro's Greatest Challenge Related to DEI:

- In 2023, 31.5% of comments related to the challenge of leadership follow-through, compared to 28.7% in 2021.
- In 2023, 10.3% were comments that were negative toward Metro's DEI initiatives, compared to 5.4% in 2021.
- By race, in 2023, nearly 18% of comments from Black/African American, Asian/Asian American, Native American/American Indian/Alaska Native, and Multiracial employees reflected sentiment that Metro was not doing enough to see through the implementation of its DEI plan, and nearly 16% of comments for these individuals centered on a need for different or more effective training for employees.

Regarding Metro's Greatest Accomplishment Related to DEI:

- In 2023, 27.5% of comments related to praise for Metro's strategy and commitment to DEI, 24.6% to Metro's great DEI training/education, 20% to Metro's improved hiring practices, and 20% specific call-outs for various DEI initiatives and leaders.
- In 2023, 10.6% were comments that were negative toward Metro's DEI initiatives, compared to 7.5% in 2021.
- By race, in 2023, over 18% of comments from Black/African American, Asian/Asian American, Native American/American Indian/Alaska Native, and Multiracial employees reflected a lack of awareness about Metro's accomplishments and 10% indicated general pessimism about Metro's efforts.

Regarding Employee Ideas for One Action to Advance DEI:

- In 2023, 15.5% of comments related to employee desire for Metro to “show” more DEI work in terms of building stronger measurements, clarifying goals, and sharing successes; 14.3% wanted additional and/or mandatory DEI training and events, and 14.3% wanted stronger recruitment/hiring/retention practices.
- In 2023, 11.6% of comments suggested the need to focus on DEI foundational/fundamental practices (up from 2.7% in 2021).
- As with other questions, the number of negative comments increased slightly, from 2.4% of comments in 2021 to 5.3% in 2023.

To be very clear, the DEI qualitative data overwhelmingly lean toward positive perceptions about DEI and Metro’s work there. The slight shifts evidenced in the qualitative comments hint that Metro is doing amazing with DEI with some employees (who hunger for more), while slightly more employees are bringing negativity to the work.

Given these findings in a current political climate that is more negative toward DEI initiatives, it’s important to stay the course for DEI initiatives, but L&L encourages Metro to stay curious in its DEI work, do more listening over the next two years, and consider looking at the agency’s DEI strategy from a fresh 2023 angle. The next two years could provide a great opportunity for some out-of-the-box/innovative thinking about DEI with the aim of figuring out how to provide more opportunities for the employees that want to see DEI grow, while also building more buy-in from naysayers.

Section 5:

Recommendations

1) Regarding Theme 1: Responding to employee open-ended feedback about a desire for more interaction, agency unity, and DEI involvement

Lexicon & Line recommends Metro start with a thorough study the qualitative feedback offered by employees, as the feedback offers both interesting perspectives on DEI and employee engagement AND some great ideas for employee interactions, collaboration, and relationship building. Some ideas suggested by employees in their feedback include the following:

- Meals shared between management and employees
- More smaller events and opportunities to make connections and engage in smaller groups
- Creation of cross-departmental teams
- Host story telling events around DEI themes
- Return to hosting town halls
- Informal engagement events like BBQs or picnics
- Regular all-staff meetings
- Metro day of celebration
- Volunteer program offerings
- More interaction between MRC employees and venues
- Team building events
- Lunch and learn/ Grub and gather opportunities
- Pride parade representation
- More collaboration and interaction across departments
- A Metro Book Club
- Employee-led events such as Parks & Nature staff-led walks for staff; WPES Q&A on recycling, etc.
- More in-person gatherings and retreats in general
- Pizza Party Thursdays
- Continue/expand the Tuesday Coffee events
- Employee Night opportunities to engage outside of work
- Opportunities to connect employees with similar hobbies/interests (e.g., game nights, playing pickle ball or other team sports, schedule outdoor activities, knitting/crafting circles)

When employees feel listened to, they are significantly more likely to be engaged in the workplace. As Metro explores new ways to provide employees with opportunities to interact and form relationships, should you build off of any specific employee suggestions, we recommend making that specifically known when advertising those events.

Regardless of the type of events/engagements planned, work to make events as interactive as possible, especially getting individuals from different departments to interact with each other. Metro employees often voice concern that Metro is too “siloesd” and seek more cross-departmental engagement. Also, employees appear to be especially seeking events that help them to make connections, build stronger teams, and establish relationships.

2) Regarding Theme 2: Exploring how Metro can engage employees differently based on work location and VHE/regular/part-time status

Onsite and variable hour (600+) employees are not engaged at the same level that remote/hybrid and regular/part-time employees are engaged. Employees that fall within the former categories voiced a desire to be engaged differently.

The Q12 data showed a particular need to address low scores for onsite/VHE employees for the following: **Know What's Expected of Me**, **Opportunity to Do Best**, and **Learn and Grow**.

Know What's Expected of Me can be best addressed by reviewing onboarding systems, job descriptions, and regular employee review/goal-setting strategies. Departments with a significant number of onsite/VHE employees should critically review the protocols/practices in place for these across all employees and ask two key questions: 1) Are my onsite/VHE employees receiving significant/meaningful onboarding and goal setting? 2) How does onboarding and goal setting look/work differently from onsite/VHE employees in comparison to remote/hybrid and regular/part-time employees? Studying the difference in experience and the needs of this group can help you to build systems that are uniquely designed for onsite and VHE employees. As management is largely responsible for onboarding and goal-setting, consider providing training to managers about how to enhance those offerings.

Opportunity to Do Best most often speaks to employee autonomy, inclusion, and innovation. A good first step to address this is for managers to schedule one-on-ones with employees that are designed from a lens of curiosity, rather than critique. When managers work to understand the work employees are doing, their unique strategies for doing the work, and any areas in which employees feel they are being underutilized, they can better understand how to let employees shine.

Addressing **Learn and Grow** is fairly straightforward, and we recommend conducting an audit of onsite/VHE employee learning and development opportunities. Are these employees given equal/meaningful opportunities to continue to grow their skills and abilities? Are those opportunities to learn and grow offered during working hours? Are accommodations provided for joining in learning and development opportunities? Are managers building out growth/development goals and plans during regular performance reviews? We recommend Metro consider the areas in which learning and development offerings and systems are deficient for onsite and VHE employees and then work to correct those. Further, it's important to take into account the situations in which onsite/VHE employees work; for example, providing computer access to employees who do not work with a computer in their day-to-day work, providing desk space and access to meeting space for employees who don't have a desk or an office, providing time during their regularly scheduled working hours to participate in learning activities, etc.

Further, as a continuation of Theme 1's recommendations, we suggest looking for ways to interact with, collaborate with, and involve onsite/VHE workers differently. For example, consider hosting in-person opportunities to engage and interact with management and MRC staff or team-building events for onsite staff. For VHE employees, make certain to include these individuals in ALL Metro events.

3) Regarding Theme 3: Staying the course on engagement and working to build stronger onboarding and goal-setting

Addressing relatively low scores for **Know What's Expected of Me** is not only something that needs to be done for onsite and VHE employees -- Metro-wide attention and care to increasing this score is needed. As was suggested above, we recommend Metro take a critical look at whether its onboarding systems are thorough, engaging, memorable, and long-lasting (in terms of the number of months that onboarding lasts); whether its job descriptions are detailed and accurate; and whether regular performance reviews include meaningful goal-setting strategies and continuous improvement strategies. Communication plays a key role in this item as well, and it's important that managers develop the type of communication skills that will allow them to clearly express work expectations. As such, in addition to improving onboarding, job descriptions, and performance review processes, we would suggest providing management with ongoing communications training to continue developing their skills there.

4) Regarding Theme 4: Investing in DEI training, coaching, communication, and leadership modeling

Our recommendation for DEI is to stay the course in their work, but to work to look at existing DEI trainings, offerings, and opportunities for involvement with fresh eyes and out-of-the-box ideas. While some employees are hungry for new DEI offerings, others wish for existing trainings to be fine-tuned and improved. Making DEI trainings available to ALL employees is important, and as employees are also seeking more in-person interactions, aim to make new DEI trainings as interactive and collaborative as possible.

Likewise, employees continue to give feedback that they often see a disconnect between Metro's agency wide goals for DEI and how management is embracing those goals. Ongoing DEI training and coaching for management should be an agency goal, as not all management-level staff have a strong level of comfort in that area. Senior-level coaching for mid-level/low-level management would be beneficial and would provide new and rising managers with department-specific leadership on how to DEI should show up in their work and in their management. Given the increase in DEI-related push-back, it is more important than ever that leadership (at all levels) be modeling strong DEI practices.

Regional Housing Funding Discussion
Other Business

Metro Council Meeting
Thursday, August 1st, 2024

REGIONAL HOUSING FUNDING: CONTINUED DISCUSSION OF CHIEF OPERATING OFFICER RECOMMENDATION

Date: July 26, 2024
Department: Office of the COO, Housing,
Finance and Regulatory Services
Work Session Date: August 1, 2024

Presenters: Marissa Madrigal
(she/her/ella), Chief Operating Officer;
Patricia Rojas (she/her), Regional
Housing Director; Brian Kennedy
(he/him), Chief Financial Officer

Prepared by: Craig Beebe,
craig.beebe@oregonmetro.gov

Length: 60 minutes

ISSUE STATEMENT

On July 9, 2024, Metro Chief Operating Officer Marissa Madrigal presented her recommendations for future housing and homeless services funding (“COO Recommendation”) to the Metro Council. Following a discussion at work session on July 25, the Metro Council has requested staff provide further information on key performance indicators/metrics and potential scenarios for changes to the Supportive Housing Services personal income tax, as described in the COO Recommendation.

ACTION REQUESTED

No action requested at this work session. Council discussion and direction will inform staff work related to the COO Recommendation.

IDENTIFIED POLICY OUTCOMES

At a work session on January 11, 2024, the Metro Council directed COO Madrigal and staff to advance five primary outcomes in the consideration of options. These include:

- **Urgency:** Identifying and addressing real, persistent housing instability and its effects on communities in the region
- **Stability:** Supporting the stability of existing housing and homelessness funding and programs in the region, including the 2018 Metro Affordable Housing Bond and the 2020 Supportive Housing Services measure (SHS)
- **Pragmatism:** Recognizing and being responsive to public attitudes, priorities and experiences with these issues and the region’s work to address them
- **Equity:** Advancing Metro’s racial equity goals through engagement, decision-making and assessment of potential investments and structures
- **Accountability and transparency:** Learning from past measures and community/stakeholder feedback to improve implementation and tracking impacts

POLICY QUESTION(S)

- What further information about policy responses to housing and homelessness challenges nationally and locally would be useful to Council to help inform their response to the COO Recommendation? ~~position on the Aff~~ ~~purpose and potential of~~

~~developing key performance indicators (KPIs) as part of the evolution of advancing oversight and accountability in regional housing and homeless services programs?~~

- What information would be useful to Council in understanding the potential policy implications of changes to the SHS personal income tax?

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

This effort has brought together the lessons and potential of two key funding measures approved by Metro region voters: the 2018 Affordable Housing Bond and the 2020 Supportive Housing Services measure. SHS and bond funding work closely together to serve deeply-impacted households – providing funding for both physical housing, and the services and rent assistance to create stability and opportunity for people in great need.

After several years of successful implementation, the Metro housing bond is nearing the expected exhaustion of its funding. There continues to be a great need for creating and preserving affordable housing. However, a new bond measure – which would be a tax increase – is not viable at this time, while SHS funds cannot currently be used to create permanent affordable housing. Together, these factors create the risk of a serious gap in regional affordable housing funding that impacts a wide variety of populations as well as the success of SHS spending.

At work session on July 25, Metro Council President Peterson led the Council in a discussion of the COO Recommendation to identify priorities and direction to staff. In particular, the Council discussed the importance of partnership and continued conversation with county implementation partners, as well the need to further explore governance changes that could improve outcomes. Council also discussed potential options for increasing or indexing the SHS personal income tax threshold so that it remains focused on higher-income households over time, including raising questions about the potential impact of such a change on available program revenue.

At this work session, Council will receive two informational presentations on aspects of the COO Recommendation. First, the Metro Council has requested a presentation on key performance indicators (KPIs) as described in the COO recommendation, to inform future conversations with county partners. Housing Department leadership will provide an overview of KPIs as described in the COO Recommendation's discussion of oversight and accountability. The COO Recommendation proposes that the development of KPIs be part of the establishment of a new regional oversight and accountability structure, including collaboration with implementation partners and stakeholders. The presentation will discuss KPIs' definition, purpose and potential for building on current outcomes and metrics already in use in SHS and Affordable Housing Bond implementation. The presentation will also include examples of how KPIs are used in other areas. Council will have the opportunity to ask questions and request further information to inform their thinking on how to advance the COO Recommendation.

Additionally, Finance and Regulatory Services staff will provide an overview of a May 2024 analysis prepared by the department, outlining potential revenue implications of various tax policy options that were discussed by the Stakeholder Advisory Table this spring, as well as Councilors at the July 25 work session. A May 2 analysis memo is attached to this Staff Report.

BACKGROUND AND NEXT STEPS

The COO Recommendation includes a range of broad and specific actions to secure sustainable funding for affordable housing and services, and to improve accountability and impact of these investments to continue addressing the homelessness and housing crisis in the greater Portland region.

The recommendations are supported by a broad coalition of subject matter experts, community members and business leaders who have worked closely with Metro to develop these recommendations.

The heart of the COO Recommendation is three-fold:

- Renegotiate portions of the Intergovernmental Agreements between Metro and the three counties to immediately address transparency and accountability challenges, with the goal of finalizing amendments by December 2024.
- Consider referring a measure to the May 2025 ballot to further strengthen accountability of the SHS program; expand its uses to include creation, acquisition and preservation of deeply affordable housing for those experiencing or at greatest risk of homelessness; and extend the sunset long enough to create efficiencies and leverage rent assistance to finance affordable housing projects.
- Reduce the SHS personal income tax rate as part of the above measure.

Details and supporting documentation for these findings are provided in the full recommendation document, which is attached to this staff report and available online at <http://oregonmetro.gov/housingfunding>. As of July 30, 2024, appendices will be added to the report online providing further detail on the Stakeholder Advisory Table process, community engagement and public opinion research. A detailed technical investments report is expected to be complete in late August.

Next steps

The Metro Council has several options for the aspects of the COO Recommendation that it wishes to advance. The Metro Council may wish to direct Councilors and/or staff to proceed with engagement or negotiations with county, city and other partners to advance Council's desired policy outcomes or specific actions. The Council could do this formally via a resolution in the near-term, or informally.

Any change to the SHS tax sunset or allowable uses would require voter approval through a measure referred by the Metro Council. Some recommendations, however, can be enacted by the Metro Council via legislation, although the Council may choose to ask voters to consider such actions through a ballot measure. These include adjustments to the personal income tax threshold, a reduction in the income tax rate, and/or changes to oversight and governance.

Following Council work sessions on July 25 and August 1, conversations with county partners and other stakeholders will continue in the coming weeks. Per Council discussion on July 25, staff will also work to prepare potential legislative options to advance Council's desired outcomes for oversight and accountability and adjustments to the income tax threshold, for further discussion and consideration in September.

ATTACHMENTS

- Chief Operating Officer Recommendation: Future of regional housing funding (July 9, 2024) [Also available at <http://oregonmetro.gov/housingfunding>]
- Finance and Regulatory Services Memo to the COO (May 2, 2024): SHS Taxes – Tax Policy Considerations
- Is legislation required for Council action? **Yes** **No**
- If yes, is draft legislation attached? **Yes** **No**



Metro



Chief Operating Officer Recommendation

Future of regional housing funding

Updated July 30, 2024

oregonmetro.gov/housing

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FRONT COVER

Built with funds from Metro's affordable housing bond, Nueva Esperanza in Hillsboro provides homes for 150 households with an emphasis on meeting the needs of farmworkers and immigrant families, among others.

The new apartment community, located in Washington County, brings a mix of housing for households with an income at or below 30% and 60% of the area medium income.

Matthew is a case manager at Do Good Multnomah's Findley Commons, a 35-apartment permanent supportive housing complex in Northeast Portland for veterans who have experienced chronic homelessness and have a disability.

This document update represents the addition of several appendices not included in the July 9, 2024 version.



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.

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.

Metro Council President

Lynn Peterson

Metro Councilors

Ashton Simpson, District 1

Christine Lewis, District 2

Gerritt Rosenthal, District 3

Juan Carlos González, District 4

Mary Nolan, District 5

Duncan Hwang, District 6

Auditor

Brian Evans

COO Recommendation on regional housing funding

Council President Peterson and Metro Councilors,

Thank you for the opportunity to issue this recommendation to you today. I am grateful to have been able to apply myself and the collective expertise of our community to topics that are deeply personal and meaningful to so many of us – affordable housing and homelessness.

Over the last six months, Metro conducted a process that was at times highly technical and in the policy weeds. At the end of the day, however, my recommendation to you is given in service to people: the people experiencing chronic homelessness in our community today, those who are on the verge of becoming chronically homeless, and those suffering from skyrocketing rent and housing instability. My recommendation includes a suggested path to fund deeply affordable housing, and addresses the future of the Supportive Housing Services program through improvements to its governance and oversight. I look forward to receiving your guidance on next steps.

In January, at your direction, Metro staff began a process with stakeholders, community members and the public, with a straightforward question: How should Metro address a looming gap in affordable housing funding in the region? However, the conversation quickly evolved into so much more. Finding agreement on how to fund affordable housing turned out to be the easy part – most agreed that expanding the uses of the existing Supportive Housing Services tax to allow investment in affordable housing (with some key parameters) was a good and urgently-needed idea.

The harder conversations were about the region's seemingly shaky future, the lack of accountability in our systems, and plummeting trust that government can accomplish what it promises.

To be clear – people in our community are not suffering from a lack of compassion. They still believe in the values that have made this region so uniquely special. They recognize the challenges we face as a society are complex and there are some things that are outside of government's control. They don't expect government to perform miracles, but they do expect transparency, logical thinking, clear outcomes and clear progress from their public institutions. They want their compassion, and the sense of urgency they feel when they see someone suffering on the street or their favorite local shop struggling to get by, to be very obviously reflected in government's approach and actions. They want government to show compassion for and understanding of their frustrations. And they want to see results.



Marissa Madrigal
Metro Chief Operating Officer

Today the region stands at an inflection point because of these sentiments. For decades, greater Portland was booming, attracting new people and businesses who wanted to enjoy our high quality of life, world-class recreation, top-notch food scene and progressive politics. Residents new and old around the region were willing to approve leading-edge policies and new investments to support ambitious regional social goals, especially for the most vulnerable among us. From parks to affordable housing to investments in climate resilience, voters in the region have trusted government with a portion of their incomes and asked businesses to pay more to support healthy, thriving communities. But the social compact between the public and the government – in which the public chooses to pay somewhat higher taxes to benefit everyone – has been tested by post-pandemic inflation and the perception that government is not doing enough.

The results of some regional tax measures have been strong and tangible. Metro's Parks and Nature bonds have protected almost 19,000 acres of precious habitat. Metro's 2018 Affordable Housing Bond is on track to exceed its goals, with nearly 5,000 new affordable housing units open, under construction or in the development pipeline. Since 2021, the Supportive Housing Services program has placed nearly 5,400 households into housing and prevented more than 14,000 households from being evicted.

However, the Supportive Housing Services program has considerable room for improvement. Like other new local single-purpose taxes, SHS has suffered from a trust-busting combination of slow-to-start programs and higher than anticipated revenues. The public has watched hundreds of millions of dollars accrue to government bank accounts, while perceiving little change on the ground to show for it.

As a result, voter willingness to support new taxes is softening, while parts of the region are signaling a need for government investment and action. Decreasing housing affordability, continuing reputational damage to the region, a perceived lack of progress on reducing the number of people living outside, and what appears to be a hyper-local recession are driving individuals and families from the region. Population loss and stagnation negatively impact the local economy and also threaten the very tax revenues that every government in the region needs to put greater Portland back on the right track.

Fortunately, our region still has many strengths on which to build. Our focus on bringing people back to our downtowns and main streets is helping small businesses of all kinds. We've increased awareness of the importance of cultural and sports events and are exploring how to invest in those for the benefit of our communities. We've made huge strides in being conscious about the impacts of growth and change on communities of color as we work to more equitably manage those impacts. But the success of all this work, and other work on behalf of our communities' overall well-being, still comes down to how well we support those experiencing homelessness.

Major findings

A majority of stakeholders, community members and voters in the region:

- Support continued investment in homeless services and affordable housing.
- Believe local government is off track and should do better with its existing resources.
- Prefer expanding Supportive Housing Services investments, instead of a new property tax, to allow the acquisition, construction and preservation of deeply affordable housing – that is, housing for those experiencing or at greatest risk of homelessness.

- Believe the focus of all SHS investments should be for people experiencing or at risk of chronic homelessness, regardless of whether those funds are spent for services or housing.
- Believe the current SHS oversight and accountability structure is not sufficient to provide transparency and ensure the desired outcomes of the measure are met, which undermines support for SHS as a whole.
- Believe the SHS tax sunset in 2030 should be significantly extended or eliminated to create greater long-term certainty for communities and providers.

Some voters and stakeholders also support:

- A modest rate cut to the SHS personal income tax to address the reality that revenues are far higher than anticipated, so long as program outcomes can still be achieved.
- Adjusting the SHS personal income tax thresholds for inflation, so that the tax continues to be applied to high-income earners.

A minority of stakeholders and the public do not support any changes to the SHS tax, believing that Metro and the counties have more work to do to prove the efficacy of the existing program. These stakeholders have also expressed fear that changes now would undermine the hard work that has gone into building the program.

Details and supporting documentation for these findings are provided in the full report.

Recommendation overview

My recommendations to you are informed by this larger understanding of the moment and the areas of greatest alignment among our diverse community. They are supported by a broad coalition of subject matter

experts, community members and business leaders who have worked closely with Metro to develop these recommendations. The heart of my recommendation is three-fold:

- Renegotiate the Intergovernmental Agreements between Metro and the three counties to immediately address transparency and accountability challenges, with the goal of finalizing amendments by December 2024.
- Consider referring a measure to the May 2025 ballot to further strengthen accountability of the SHS program, expand its uses to include creation, acquisition and preservation of deeply affordable housing for those experiencing or at greatest risk of homelessness, and extend the sunset long enough to create efficiencies and leverage rent assistance to finance affordable housing projects.
- Reduce the SHS personal income tax rate as part of the above measure.

Public opinion surveys demonstrated a referral of this nature to the November 2024 ballot was likely viable. However, public opinion surveys also documented a worsening view of local government from previous surveys. Part of restoring trust is demonstrating that we are being thoughtful, careful and sober with the public's top priority. While there is broad stakeholder support for the recommendation as a whole, there remain a handful of details that need further discussion with stakeholders, advocates and subject matter experts. I believe Metro should measure twice and cut once, before asking voters to make changes to the SHS program. A misstep would not only foreclose our only real near-term path to avoiding a gap in affordable housing funding – it would undermine the ability to reform and extend the SHS program in the future.

Recommendation

Metro Council should consider the following actions:

1. Support regional, statewide and national efforts to reduce the cost of housing overall, the cost of affordable housing, identify infrastructure funds to support cities in developing land for affordable housing, etc.
2. Initiate a re-negotiation of the Supportive Housing Services Intergovernmental Agreements between Metro and each of the three counties to improve transparency, increase accountability and strengthen oversight of existing SHS programs to the extent possible within existing framework. Complete by December 2024.
3. Index the SHS personal income tax thresholds to inflation, starting in tax year 2024.
4. Consider referring a measure to voters for the May 2025 election to amend SHS in the following ways:
 - a. Expand the use of SHS funds to allow acquisition, construction and preservation of affordable rental housing and permanent supportive housing, with sufficient flexibility to complement county SHS investments.
 - b. Strengthen SHS commitment to serving those experiencing or at risk of chronic homelessness.
 - c. Establish clearer, more independent oversight of the program by creating a single, independent Investment Board appointed by the Metro Council and representing subject matter expertise in key areas of the system including but not limited to: lived experience, homeless services, healthcare, behavioral health care, substance use disorder and treatment services, affordable housing development, finance, the justice system, data and performance. This Investment Board would be responsible for making recommendations to the Metro Council regarding program goals, outcomes, affordable housing targets and data-driven key performance metrics as components of a new Regional Investment Strategy, to ensure homelessness is as rare, brief and non-recurring across the region as possible.
 - d. Implement a direct feedback channel to the independent oversight body for direct service providers and those with lived experience with homelessness and housing instability to inform the development of the Regional Investment Strategy.
 - e. Require counties to submit new Local Implementation Plans that conform with the Regional Investment Strategy and demonstrate feasible workplans to meet key performance metrics established by the Investment Board.
 - f. Require Metro to set regional reporting frameworks, standards and definitions for service types and delivery; prepare monitoring plans, accountability mechanisms; approve housing projects, fund regional investments to improve system alignment, coordination and standardization within existing 5% administrative cap.
 - g. Dedicate a minimum percentage of funds to capital investments in affordable housing and permanent supportive housing. A portion of existing carryover would be used for immediate investment opportunities, and future capital funding allocations would be driven by the Regional Investment Strategy and Local Implementation Plans.

- h. Extend the SHS sunset enough years to leverage rent assistance for affordable housing development and ensure long-term stability of services for people experiencing chronic homelessness.
- i. Address cities' needs for better support and coordination from SHS partners.
- j. Reduce the personal income tax rate.

Should the Metro Council choose to pursue a ballot measure, I recommend that the Council convene an elected-to-elected workgroup led by the Metro Council President or her designee, to finalize remaining details including length of extension, degree of personal income tax rate reduction, and the need for stronger partnership and alignment with the region's cities. Staff also recommends deeper engagement with those who have lived experience and those who serve those with lived experience to ensure that the reforms contemplated do not have unintended consequences.

While this is a formal recommendation of the Metro COO to the Metro Council, it is important for transparency to emphasize that it is not the opinion of one person, but rather the synthesis of feedback and advice from countless subject matter experts, community members, advocates, practitioners, stakeholder coalitions and Metro staff, who have worked diligently to apply the values Metro Council originally set forth for this process, including ensuring the stability of existing investments, pragmatism, urgency, equity and inclusion, and transparency and accountability. If approved by voters, a ballot measure of this nature would not only continue funding for deeply affordable housing. It would also provide a stable bedrock of funding for outreach, shelter and wrap-around services for a generation or more. Reformed governance would ensure that regional outcomes and key performance metrics are established in advance, while still allowing counties the

flexibility to design customized approaches for their communities. This recommendation represents an opportunity to demonstrate that our government is willing to listen, self-reflect, and consider different approaches in pursuit of better service to our community.

Metro is fortunate that the counties, recognize the need for all of us to build on the program's early successes, demonstrate tangible outcomes and increase trust with the public. Since the end of the Regional Housing Stakeholder Advisory Table in May, Metro has had productive discussions with staff from Clackamas, Multnomah and Washington counties. Our conversations have sought shared agreement addressing opportunities and risks presented by stakeholder and community feedback which called for increased accountability, funding for housing and an extension of the SHS tax. Those conversations continue, but Metro and county staff have begun to establish a framework at the staff level that could provide our respective elected bodies a number of reforms to consider either via changes to existing IGAs and/or a referral to voters. Metro Council may also wish to consider legislatively enacting improved oversight and accountability provisions.

Staff and I stand ready to receive your direction, including providing additional information, support the Metro Council in implementing this recommendation, refine the recommendation or pause work. Once again, thank you for the opportunity to share this recommendation with you today.

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Greater Portland faces a persistent, widespread housing and homelessness crisis.

The housing and homelessness crisis is deeply impactful to communities across our region because a safe and stable home is part of a person's basic, fundamental needs. On a broader scale, housing insecurity strains local resources and impacts community safety, public health, education, employment and more.

On January 11, 2024, the Metro Council directed Metro Chief Operating Officer Marissa Madrigal to engage in a formal process of technical work, research and broad stakeholder engagement. This work was intended to continue to identify solutions to address the need for regional affordable housing and opportunities to integrate affordable housing with supportive services investments that address homelessness.

This section provides an overview of the challenges that prompted this direction – and why now is the time to double down on our commitments and seek comprehensive, collaboratively-sourced and pragmatic policy solutions.

The region's housing and homelessness crisis is affecting everyone – especially our neighbors with low incomes, renters, and those who are Black, Indigenous and People of Color.

Housing cost burdens in the region affect renters and homeowners across the spectrum – particularly in a time of inflation, high interest rates and low housing supply. A Joint Center for Housing Studies of Harvard University found that Oregon has some of the highest percentages of cost-burdened renters in the United States, with 50 to 58 percent of renters identified as cost-burdened, spending more than 30 percent of their income on rent and utilities.

Renters with low and very low incomes experience those burdens more severely. Due to historic and ongoing practices and policies that have barred many people of color from full access to the economic benefits of a growing regional economy, we know that rent-burdened households are disproportionately include people who identify as Black, Indigenous and People of Color.



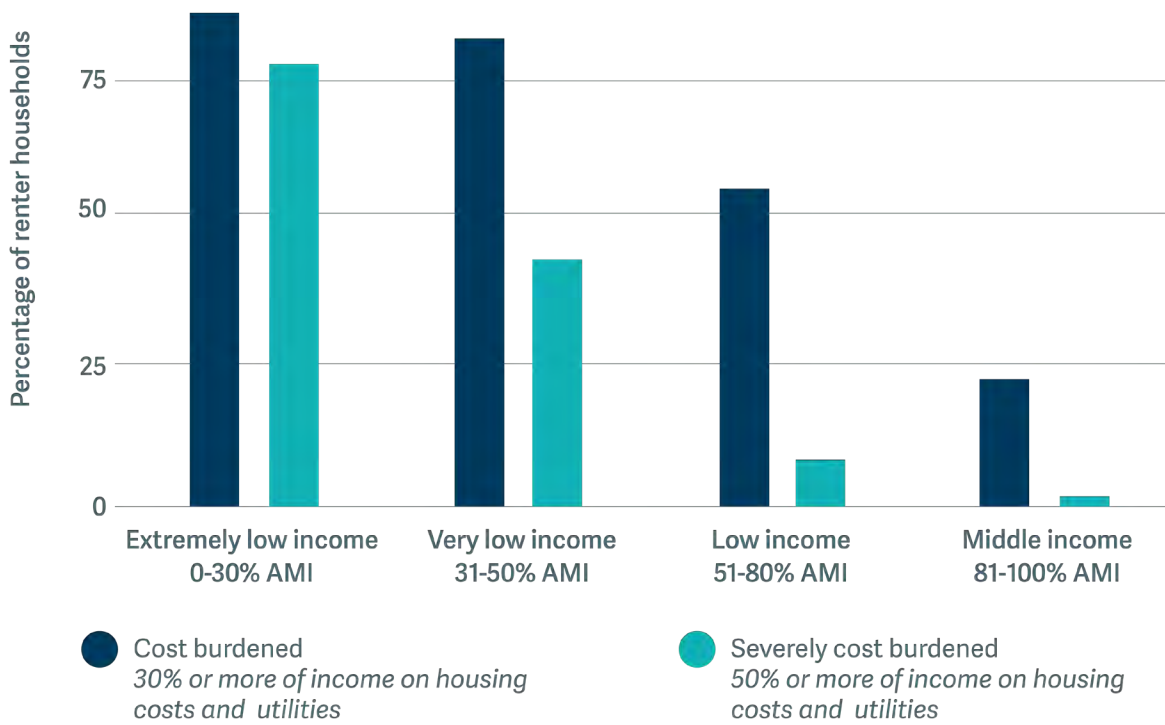
People need both affordable homes and supportive services

"You think it's never going to happen to you," Betsy said, but "I became homeless." After losing her husband and home, Betsy and her dog Vlad ended up sleeping in her car. She found hope when an agent at 211 connected her with Human Solutions (now Our Just Future). There, Betsy found a supportive environment and took a RentWell class, preparing her for successful rental housing.

Eventually, she secured an affordable apartment through Cascadia Health. At her new home, housing program coordinators continued to assist Betsy with navigation and referral support and financial resources, including rent assistance funded by Metro's Supportive Housing Services program. This combination of affordable housing, and supportive services has helped Betsy maintain stability and enjoy her home for several years.

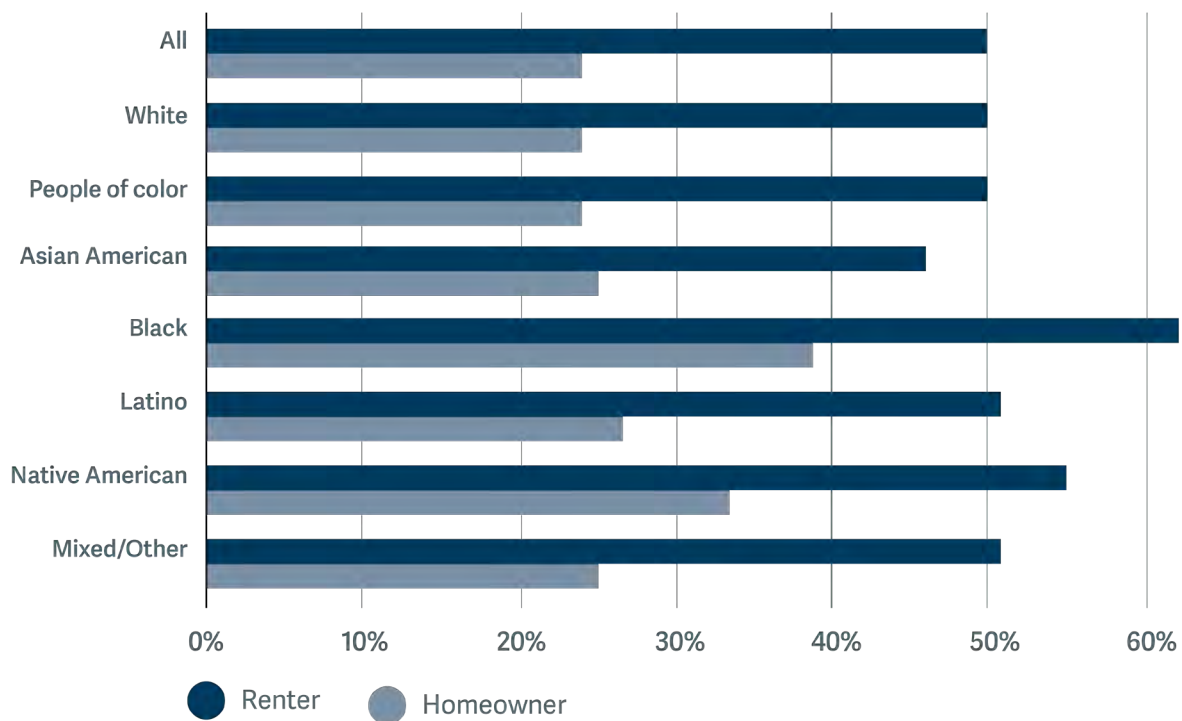
Percentage of cost burdened renter households in Oregon

Source: National Low Income Housing Coalition, 2022 <https://nlihc.org/gap/state/or>



Percentage of cost burdened households by race and ethnicity

Source: National equity atlas, Portland and Beaverton, OR and Vancouver, WA 2020. https://nationalequityatlas.org/indicators/Housing_burden



This is a crisis with several causes. Among the greatest: Incomes are not keeping up with rent.

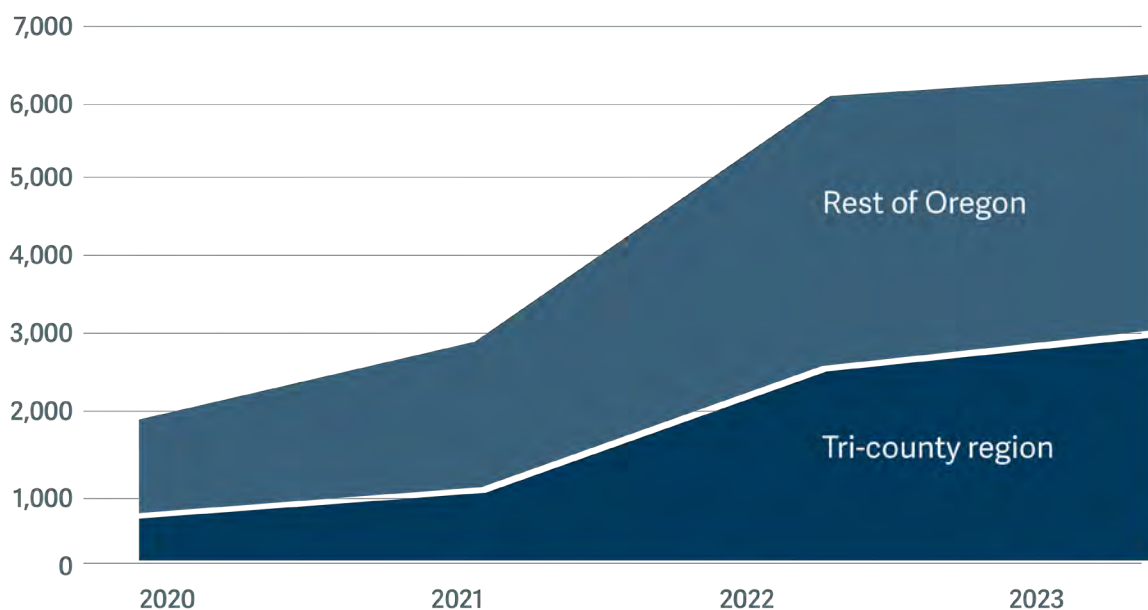
Average incomes in the greater Portland area are rising, like the rest of the country, but not quickly enough to catch up with rent increases going back years. Average rents are increasing to amounts that even moderate-income households struggle to afford.

The inability to keep up with rent is a major contributor to evictions, which have risen sharply since the end of the pandemic-era renter protections.

Eviction judgments, Tri-county region and Oregon, 2020 to 2023

Source: *Evicted in Oregon*, Oregon Judicial Department court records, June 2024.

www.evictedinoregon.com/outcomes



Note: Clackamas county data (incorporated into tri-county total) has multiple court-systems process eviction cases. Data represented only includes eviction cases filed in circuit courts, and therefore is only a partial representation of the eviction cases in those counties.

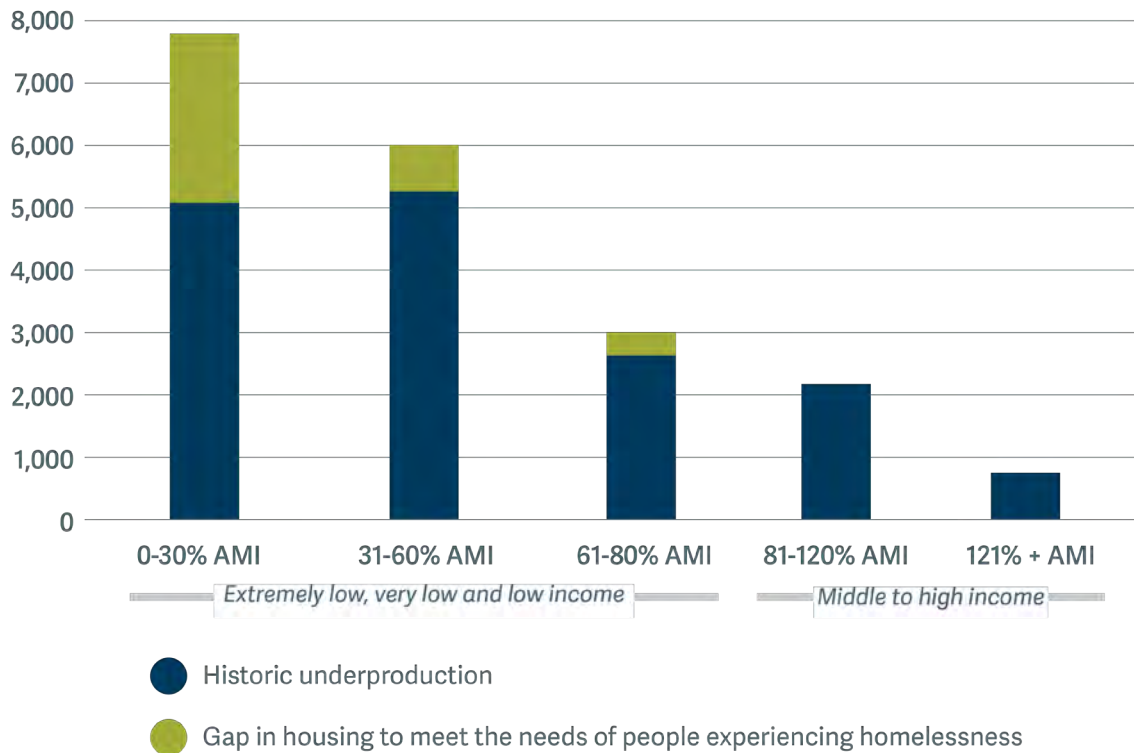
The supply of housing – especially affordable housing – is not keeping pace with the need.

For years, the region’s supply of housing has fallen short. There is already a significant gap to fill to meet existing housing needs, which without continued action will only widen over time.

Models estimate that greater Portland currently is nearly 24,000 units short of what’s needed to support existing population levels. In addition, the most recent estimate for future production shows that our region needs to produce 150,000 units of housing over the next 20 years to keep up with future growth.

Existing housing needs by income group, Metro region

Source: Metro, Urban growth report, July 2024. www.oregonmetro.gov/public-projects/2024-growth-management-decision



Note: Historic underproduction is based on U.S. Census data. The gap in housing to meet the needs of people experiencing homelessness is not counted by U.S. Census data.

Almost two-thirds of that future housing will need to be units affordable for people or households earning less than 80% AMI, as the need for affordable housing will continue to grow.

One contributor to the need for affordable housing is an aging population. Between now and 2044, the number of people over the age of 65 in the region will grow significantly.

Many households, often including those with people over the age of 65 and those with disabilities, rely on fixed incomes from sources like pensions or Social Security. These incomes do not increase at the same rate as expenses such as rent, utilities, healthcare and food. Unless a household has substantial savings or is able to supplement its income, this can create financial strain that makes it difficult or impossible to maintain housing.

Older adults represent the fastest-growing segment of the homeless population. According to the National Alliance to End Homelessness 2023 Point-in-Time count report, nationwide, almost one in four individuals experiencing homelessness last year were over the age of 55.

Although there are many tools to support housing creation, public investment is critical for deeply affordable housing.

As with other areas of regional concern, Metro plays a unique role in connecting the dots between long-term planning and the needs and experiences of people living here now.

Through urban growth management duties, land acquisition programs and grants to support planning for new homes and jobs, Metro helps to foster the conditions and land availability to support new construction of houses and apartments that are affordable across the income spectrum. Metro is also positioned to support strategic investments in housing investments along current and future transit corridors, ensuring long-term affordability follows opportunity.

Metro also works to support city and county partners in assessing housing needs and implementing zoning and code changes to speed up construction of housing in existing, developed areas – including areas with good access to transit, services and jobs.

However, affordable housing for those with the lowest income requires public subsidy due to both higher operating costs and income-restricted rents. This is an issue the market cannot solve alone.

Public investment is essential and required to build affordable homes

Public investment is essential for affordable housing development because these projects rely on a complex mix of public and private funding sources. Unlike market-rate projects that can secure long-term debt paid off through rental income, affordable housing projects face significant challenges. The rents charged in these buildings are not sufficient to cover operational and maintenance costs, nor are they high enough to repay the upfront investment and debt leverage required to fund the project. Public and affordable housing is not designed to be sold for a profit after asset appreciation. While the market plays a key role in housing construction, this financial gap makes it impossible for the market alone to create housing that remains affordable for low and very low-income households.

As a result, community and public funders play a critical role in bridging this gap. By providing the necessary financial support, public investment ensures the development and sustainability of affordable housing projects. Without this support, the market would be unable to produce housing that meets the needs of lower-income populations. Public funding is crucial not just for covering operating costs, but also for ensuring that the initial development and construction costs can be met without requiring prohibitively high rents.



Good Shepherd Village is the first affordable housing to be built in Happy Valley, and the largest affordable housing development in Clackamas County. In November 2023.

Voters have taken action to create housing – and the results are evident.

In 2016, City of Portland voters approved a bond to fund affordable housing creation with a goal of creating 1,300 newly affordable homes. While significant, this bond could only invest within the city limits. Housing affordability is a regional issue, however, and funding scarcity continued across the region.

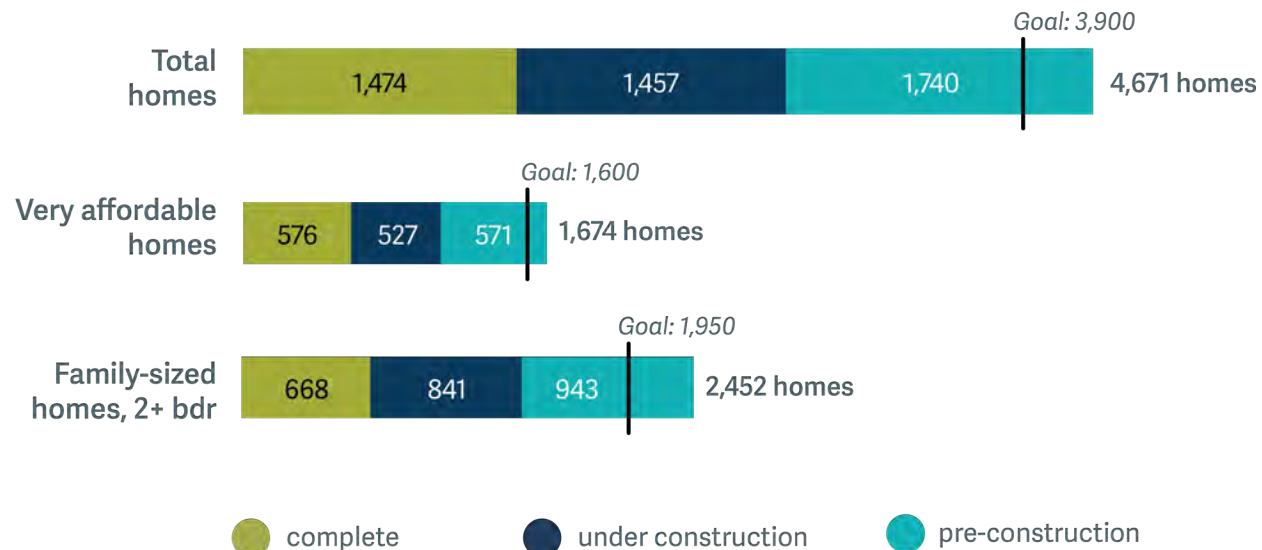
In 2018, the region’s voters overwhelmingly voted to approve Metro’s Affordable Housing Bond, signaling support for direct investment to address the housing gap in every part of the region. The bonds they authorized to build affordable housing have had a greater impact than we could have hoped.

With the help of seven local implementation partners and countless affordable housing providers and developers, construction and trades workers, community partners and others, Metro’s Affordable Housing Bond is on track to deliver nearly 4,700 affordable housing units – roughly 20 percent more than the original goal of 3,900. Exceeding goals for family-size units and deeply affordable units, this bond has maintained an important commitment to serve communities of color. These units are spread across the region, including in many communities that have historically been out of reach to people with lower incomes – who may nonetheless travel to these communities to perform essential jobs like teaching, childcare or staffing local businesses.

Thanks to voters, as many as 15,000 people in the region will have an affordable home, as well as many more people in generations to come.

Metro Affordable housing bond progress

Source: Metro, June 2024. www.oregonmetro.gov/public-projects/affordable-homes-greater-portland/progress



Within a few years, however, both the 2018 Metro Affordable Housing Bond and the 2016 Portland Housing Bond will have completed their investments – leaving the region with no local, dedicated funding source for creating affordable housing.

People with the greatest needs require more than housing– and once again, voters took action.

In May 2020, as the world grappled with simultaneous reckonings of pandemic and racial justice, voters passed Metro’s Supportive Housing Services measure (SHS). SHS is the country’s largest per-capita investment in providing housing services at a regional scale – creating a new high-earner and business income tax to dramatically increase resources available to fund a wide array of services.

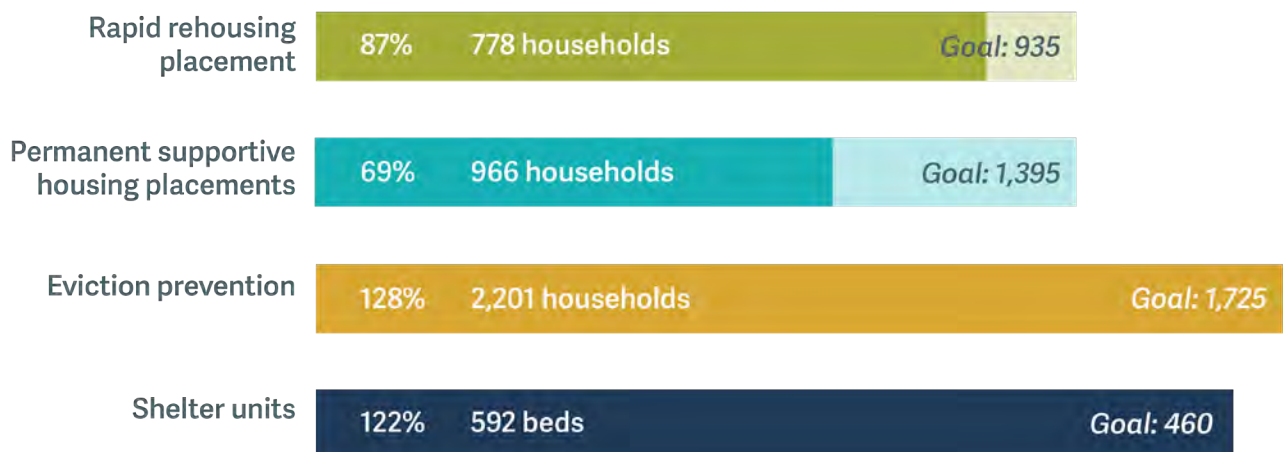
SHS was intended to complement the 2018 Metro Affordable Housing Bond. In development of the bond, inclusive engagement with diverse communities and stakeholders representing deep experience with housing needs informed a framework that recognized a commitment to deep housing affordability would also require funding for a wide variety of supportive services to support housing access and stability, particularly for people who are exiting or experiencing homelessness.

Thanks to voter approval of SHS, Metro now works with Clackamas, Multnomah and Washington counties to reduce homelessness through programs and services that help people find and keep safe and stable homes. These include but are not limited to:

- Emergency services such as outreach and shelter
- Placement into housing
- Help paying rent (emergency, short-term and long-term rent assistance)
- Advocacy, service coordination and case management
- Direct services in the areas of housing stability, mental health, physical health, language and cultural needs, education, employment, addiction and recovery, tenant rights and more.

Metro Supportive housing services progress

Source: Metro, Clackamas, Multnomah and Washington county. March 2024. www.oregonmetro.gov/public-projects/supportive-housing-services/progress



Progress and commitment call for action now, as an affordable housing funding gap looms.

As described above, voter support and hard work has led to considerable successes in affordable housing investment in the region. Within a few years, however, both the 2018 Metro Affordable Housing Bond and the 2016 Portland Affordable Housing Bond will have completed their investments – leaving the region with no local, dedicated funding source for creating affordable housing.

Community members and stakeholders aren't standing idly by in the face of this challenge. In summer 2023, stakeholders from the housing, advocacy and business communities began conversations with Metro Councilors and staff about taking action now. They articulated the threat that a lapse in affordable housing funding could pose to the momentum we've built together, dramatically reducing affordable housing production right when we need it most, and dismantling the infrastructure of affordable housing creation just as it reaches full steam.

These stakeholders also recognized an opportunity to think strategically about what SHS funding can do and an opportunity to apply what we've learned from both the affordable housing bond and SHS measures to improve oversight and accountability, and more fully meet the needs of people in our region.

These considerations and conversations initiated the recent stakeholder engagement and recommendation development process described throughout this document.

AT-A-GLANCE

2018 Affordable housing bond

2020 SHS Measure

Tax type

Property Tax

Personal Income Tax and Business Income Tax

Who pays

All property owners in the Metro District.

Property owners are taxed directly via county tax assessments.

Generally, these costs are also passed through to renters.

Personal Income Tax: Individuals who make more than \$125,000 annually and people filing jointly who make more than \$200,000 annually

Business Income Tax: Businesses with gross receipts above \$5 million. These costs are typically passed through to consumers where possible.

How the tax is calculated?

Metro issued \$652.8 million in general obligation bonds. The debt service to repay the bonds are funded by the property tax.

Property owners are assessed approximately 20 cents per \$1,000 of assessed value to pay for the annual debt service. The assessed value of the property is based on county tax assessments.

The 2018 Metro affordable housing bond is scheduled be fully paid-off in 2039; property owners will be taxed for payments until then.

Personal Income Tax: 1% marginal tax is applied to taxable income above \$125,000 for single filers or \$200,000 for joint filers. For Metro residents, it applies to income earned anywhere. For nonresidents, it only applies to income earned within the Metro district

Business Income Tax: 1% tax applied to Metro Taxable Income (net income)

Who receives the revenue?

The 2018 Metro affordable housing bond is scheduled be fully paid-off in 2039; property owners will be taxed for payments until then.

It is anticipated that all funds from this bond will be fully committed to housing projects by December 2024.

The capital spending timeline varies, but typically within 10 years. The debt service continues until the bond is repaid, generally within 20-30 years.

The tax is scheduled to end in tax year 2030.

Allowable uses

Funds are distributed to implementation partners for creation of affordable homes. The forecasted production goal for the bond was 3,900 units.

With limited exceptions, property tax bonds can be used only for capital projects, typically those requiring significant funding up front.

State law prohibits funding services and programs with property tax bonds.

Revenue can be used for the following: supportive housing services, long-term and short-term rent assistance, housing placement services, eviction prevention, transitional housing, and shelter.

The SHS measure does not currently allow revenue to be used for the construction or purchase of housing units.

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An issue this important needs an open, diverse conversation.

Housing and homelessness are deeply challenging, multifaceted issues. Therefore, it was critical from the beginning of this effort that we heard from, and applied, feedback from people with diverse experiences and broad expertise from across the region.

There are many heartfelt views among people who work with or on behalf of our neighbors struggling with these challenges, as well as their hard-won experience with effective interventions and solutions. Because the crisis has far-reaching impacts on our communities, Metro also made efforts to include perspectives that went beyond those directly experiencing homelessness or those working at the forefront.

Full consensus on a single path forward was not expected nor sought during this process – the top priority was to gather a wide diversity of views. There are key areas where this process uncovered broad alignment such as an enduring commitment to focus limited affordable housing resources on acquiring and building more deeply affordable housing. Other areas need ongoing conversation, as discussed in other chapters of this recommendation.

The collective care, deep experience and uncommon dedication shared by the participants and stakeholders who contributed time, energy and insight to this work is remarkable and an important contribution to our region.

This section details the various channels of this process and the key areas of alignment and concern that emerged.

This work began with clear values.

In January 2024, the Metro Council established five key values to guide this process, which Metro staff have advanced in every aspect of the work. These values include:

Urgency: Identifying and addressing real, persistent housing instability and its effects on communities in the region.

Stability: Supporting the stability of existing housing and homelessness funding and programs in the region, including the 2018 Metro Affordable Housing Bond and the 2020 Supportive Housing Services measure (SHS).

Pragmatism: Recognizing and being responsive to public attitudes, priorities and experiences with these issues and the region's work to address them.

Equity: Advancing Metro's racial equity goals through engagement, decision-making and assessment of potential investments and structures.

Accountability and transparency: Learning from current measures and community/stakeholder feedback to improve implementation and tracking impacts.

Areas of engagement

Stakeholder Advisory Table

Appointed by COO Madrigal, the Stakeholder Advisory Table brought together a broad diversity of interests, experiences and perspectives, including county and city elected officials, providers and advocates, community-based organizations, and business leaders from across the region. The group also included members of the Affordable Housing Bond and Supportive Housing Services oversight committees and Metro's Committee on Racial Equity.

Over approximately ten weeks, through five in-person meetings, two virtual subtopic discussions and two public opinion research briefings, the Advisory Table grappled with several topics, including the potential consequences of a gap in housing funding, revenue and taxation options, scenarios of priorities for populations and investments, and an exploration of program oversight and accountability. Conversations were structured to identify areas of convergence as well as divergence and were supported by facilitation from Drawbridge Innovations.

Community partner-led engagement

The current effort benefits from the considerable community engagement that shaped the 2018 Metro Affordable Housing Bond and 2020 SHS frameworks. Hundreds of community members have been engaged in implementation of both measures over the last several years helping shape a range of work from local investment strategies to specific housing and development projects.

For this recent effort, Metro contracted with the Coalition of Communities of Color to gain further, current perspectives from impacted communities, using engagement themes from the previous measures as a foundation.

The Coalition of Communities of Color conducted discussion groups in Clackamas, Multnomah and Washington counties in April and May 2024. Through over a dozen discussion groups, the Coalition affirmed and broadened our understanding of priorities and experiences of community members grappling with these challenges.

Community engagement themes

The following themes emerged from a community engagement on regional housing funding conducted through a partnership with Coalition of Communities of Color in spring 2024.

- Strong support for continuing funding for homeless services and a need for more affordable housing.
- Priority on homeless and housing investment for people experiencing chronic homelessness.
- Hope for investment in a spectrum of capital needs, from shelter to building and preserving affordable rental housing to homeownership opportunities.
- Articulating that future housing investments reflect community needs, focus on deep affordability, and build a culturally-responsive, welcoming, safe and stable community.
- Eagerness to engage directly with government and policymaking as investments move forward.

Engagement with regional committees

As with all areas of regional concern, Metro benefits from the time, collaboration and guidance of stakeholders, partners and experts who serve on advisory and oversight committees. We sought to apply that insight to this effort, providing updates and receiving input from these committees on multiple occasions.

Committee on Racial Equity. COO Madrigal and staff met several times with CORE to discuss the future of housing funding in our region. As the entity responsible for advising the Metro Council on the implementation of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion, CORE was an essential contributor to understanding strategies and priorities for supporting equity in decision-making, stakeholder engagement, recommendation development and in the implementation of any programmatic or funding changes for future housing investments.

Metro Policy Advisory Committee. With a key role advising Metro Council on growth management and land use issues and representation spanning cities and special districts, MPAC has a unique opportunity to provide input across a diversity of community experiences and needs. They shared insight on planning and transportation considerations, while also sharing needs specific to their constituencies.

SHS and Metro Affordable Housing Bond Oversight Committees.

These committees play a critical role in reviewing, monitoring and ensuring that implementing partners are meeting goals and requirements of the measure. COO Madrigal and other staff provided updates, answered questions and sought feedback from these committees during this process.

Committee members have provided valuable feedback from their first-hand expertise as we consider how to improve oversight and accountability. Additionally, co-chairs from each of the committees served on the Stakeholder Advisory Table.

Public partner engagement

Nearly every program, policy and investment Metro undertakes is done in close collaboration with our local government partners. For the Affordable Housing Bond, primary implementation partners included the three county housing authorities, the cities of Beaverton, Gresham, Hillsboro and Portland, and Metro's Site Acquisition Program team. Several other cities in the region contributed to the completion of bond-funded affordable housing projects through strategies like fee waivers and streamlined permitting. For supportive housing services, the three counties have developed implementation plans and been responsible for working with their cities, along with providers, community organizations and other partners on implementation.

Understanding local governments' needs, priorities and recent experience with housing and services funding has been an important part of developing a recommendation that creates the greatest potential for improved collaboration in the future. Throughout this process, COO Madrigal and Metro staff have met with officials at every level of local government, including elected leaders, city and county managers, revenue managers, planners, and housing and services implementers. All three counties and elected officials from Beaverton, Portland and Lake Oswego elected officials were represented on the Stakeholder Advisory Table.

Technical analysis on housing investments and revenue

To identify and understand investment priorities that meet this moment, Metro's Housing department worked with a consultant team to conduct research on national and regional best practices and review successes and challenges from implementation of the Affordable Housing Bond. The team also worked to develop models of impact to evaluate different housing investment strategies. Technical interviews with dozens of practitioners connected to housing and homelessness work in our region were also conducted to gain their expertise and insight on topics ranging from construction financing to community benefit opportunities. This recommendation, particularly the Investments chapter that follows, have been informed by findings from this work.

Metro's Finance and Regulatory Services department also conducted months of research, modeling and engagement with financial experts to assess revenue volatility, forecasts and considerations for investments. This work is discussed further in the Revenue chapter of this recommendation.

Public opinion research

Public opinion research is no replacement for the deep and broad engagement with community, stakeholders and practitioners described above. However, intentional research with representative samples of community members can illustrate the resonance and potential viability of funding proposals, particularly those that require voter approval. While our understanding of public opinion on these issues is informed by focus groups and quantitative surveys going back several years, Metro conducted specific additional surveys on housing and homelessness funding options several times between late fall 2023 and the release of this recommendation.

What we heard: Areas of alignment

As noted previously, the project team did not seek to find full consensus, and instead worked to identify and understand an array of concerns and questions. There were, however, several areas of broad alignment that emerged across channels of input:

- Agreement that ongoing state, local and regional funding for acquisition and construction of affordable housing is critical to the health and welfare of the entire community.
- Recognition of the dangers of the looming gap in regional affordable housing funding as existing bonds wind down – with rippling social, economic and community costs.
- General openness to expanding the allowable uses of SHS revenue to include affordable housing, while also maintaining commitments to fund services.
- Prioritizing any affordable housing investment to focus on serving people and families with the greatest need – namely, those experiencing chronic homelessness or at the greatest risk of it.
- Ensuring that services and housing investments continue to prioritize racial equity, recognizing that communities of color disproportionately experience homelessness, housing instability and their effects.
- Creating long-term stability and predictability for providers, partners and people in need of homeless services, rent assistance and affordable housing – in part by addressing the current 2030 sunset of SHS taxes and funding.
- Improving transparency, accountability and efficiency in the allocation, spending and reporting of regional housing and services tax dollars.

What we also heard

While there were several areas of broad agreement, it is also important to note concerns we heard from stakeholders. Some concerns can be addressed or answered within the scope of this project and Metro's role in the region, while others will take continued time and energy to explore.

We heard concerns about the timing of this effort, about stretching an already-strained system, and losing sight of commitments we've already made to voters. Stakeholders had diverging perspectives on the fairness, impact and efficacy of the SHS taxes on high-earning households and businesses. Some sought tax rate reductions in recognition of higher-than-expected revenues, or changes to the personal income tax threshold given increasing wages and inflation. Others raised concerns about such moves' potential impacts on revenue, given increasing costs to meet housing and services needs.

We also heard several ideas for potential investments that may be sound policy priorities, but are beyond the scope of a focus on those experiencing or at risk of chronic homelessness. These include investments in middle-income or workforce housing and affordable homeownership.

Finally, given the diversity of local conditions and needs in the region, we heard a range of ideas about how to restructure oversight and accountability to apply local knowledge and flexibility that advances clear regional goals and outcomes. To highlight one example, we heard strong interest from city stakeholders in ensuring that cities' needs are adequately considered as partners in housing and supportive services investments. These local-regional dynamics were central to 2018 Metro Affordable Housing Bond and 2020 SHS frameworks, but there were diverging opinions about how successful these models have been for each of these measures – and how they might be evolved to address concerns and increase integration.

Regional Housing Stakeholder Advisory Table, Spring 2024

Olga Acuña (she/her): Director of Federal Programs, Hillsboro School District; Board member, Community Housing Fund

Oscar Arana (he/him): Interim Chief Executive Officer, Native American Youth and Family Center

Mayor Lacey Beaty (she/her): Mayor of City of Beaverton

Andrea Bell (she/her): Executive Director, Oregon Housing and Community Services

Kabir Bhatia (he/him): Partner, BridgeWorks Capital; CEO, StoneStable; Board member, Habitat for Humanity, Portland Region

Keisha Brewster: Member, Metro Committee on Racial Equity

Mayor Joe Buck (he/him): Mayor of City of Lake Oswego

Lee P. Cha (he/him): Executive Director, Immigrant and Refugee Community Organization

Andrew Colas (he/him): President and CEO, Colas Construction

Jonath Colon Montesi (he/él): Deputy Director, Centro Cultural

Rachael Duke (she/her): Executive Director, Community Partners for Affordable Housing

Melissa Erlbaum (she/her): Executive Director, Clackamas Women's Services

Dan Field (he/him): Director, Joint Office of Homeless Services, *representing Chair Jessica Vega Pederson, Multnomah County*

Ernesto Fonseca (he/him): CEO, Hacienda CDC

Christina Ghan (she/her): Policy Director, City of Portland, *representing Office of Commissioner Carmen Rubio*

Stephen Green (he/him): Executive Director, Business for a Better Portland

Ezra Hammer (he/him): Attorney, Jordan Ramis

Chair Kathryn Harrington (she/her): Chair, Washington County Board of Commissioners

Sanai Hennessee (she/her): Western States Regional Council of Carpenters, *Nickeia Hunter alternate*

Molly Hogan (she/her): Executive Director, Welcome Home Coalition

Kymerly Horner (she/her): Executive Director, Portland Community Reinvestment Initiatives

Sean Hubert (he/him): Vice President and Chief Strategy Officer, Central City Concern

Jon Isaacs (he/him): Executive Vice President, Public Affairs, Portland Metro Chamber

Jenny Lee (she/her): Deputy Director, Coalition of Communities of Color

Kevin Lux (he/him): Executive Secretary-Treasurer, Columbia Pacific Building and Construction Trades Council

Angela Martin (she/her): Director, HereTogether Oregon

Elizabeth Mazzara Myers (she/her): Executive Director, Westside Economic Alliance

Alexander Phan (he/him): Principal Broker and Team Leader, Diverse Realty Group; Vice Chair of Board of Directors, HomePlate Youth Services

Steve Rudman (he/him): Co-chair, Metro Affordable Housing Bond Oversight Committee

Margaret Salazar (she/her): CEO, REACH Community Development

Amanda Saul (she/her): Assistant Director of Development, Home Forward

Patrick Sheehan: Board Member, North Clackamas Chamber

Michi Slick (she/her): Principal; Killian Pacific; Commissioner, Prosper Portland

Chair Tootie Smith (she/her): Chair, Clackamas County Board

Mandrill Taylor, MD, MPH (he/him): Addiction Psychiatrist, Kaiser Permanente; Co-chair, Supportive Housing Services Regional Oversight Committee

Bob Walsh: President and co-founder, Walsh Construction Co.

Laurie Wimmer: Executive Secretary-Treasurer, Northwest Oregon Labor Council

Accountability and oversight recommendations

During the engagement process to create this recommendation, members of the Stakeholder Advisory Table and other stakeholders shared deep concern about what they perceived or experienced as the need to improve ineffective governance and accountability structures in the Supportive Housing Services program (SHS). The continued calls from a broad range of participants to evaluate roles and responsibilities, standards, performance measurement and accountability within the SHS program required staff to examine these concerns further. Thus, the project scope expanded to include governance as an additional, important element of this recommendation.

The SHS measure was referred to voters in February 2020, before the COVID-19 pandemic exacerbated systemic fractures and changed the services landscape, including hiring practices, the labor pool and the ability to recruit and retain workers, particularly in this field. Serving those in need and delivering improved outcomes has turned out to not be as simple as pouring more money into existing programs. Regardless of the root cause, the public and non-profit systems in place to serve people in need have struggled to absorb unprecedented funding, fueling the public's distrust and jeopardizing the program.

Since its inception three years ago, audits conducted by the Metro Auditor and at the county level have detailed weakness in SHS oversight and accountability. Understanding these obstacles is crucial as we strive to refine and improve the system.

Not surprisingly, the SHS measure anticipated that Metro should periodically reevaluate the SHS program's oversight and accountability structure. Indeed, the SHS measure explicitly authorized Metro to "conduct a review of the regional oversight committee's role and effectiveness as appropriate." Reviewing the SHS Oversight Committee's "role and effectiveness" necessarily entails a review of the program's oversight more broadly. This review – upon us now – likewise empowers the Metro Council to legislatively act, if necessary, to ensure "effective" and "appropriate" SHS program oversight. This is especially true given the lessons learned, changing circumstances and evolving program needs – including the recommendation to add affordable housing. The Metro Council may also wish to consider legislatively enacting improved oversight and accountability provisions.

Recommendations

The recommendations in this chapter build on the current SHS program, ensuring that efforts are pragmatic and geared toward maintaining the stability of services while creating a more streamlined and efficient system. By addressing identified gaps and ambiguities, we aim to enhance oversight, accountability and ultimately the effectiveness of SHS, particularly if we look to further integrate regional housing and supportive service investments into one system that creates better access and outcomes for those who need it most.

This section provides more information on the following recommendations:

- Initiate a re-negotiation of the Supportive Housing Services Intergovernmental Agreements between Metro and each of the three counties to improve transparency, increase accountability and strengthen oversight of existing SHS programs to the extent possible within existing framework. Complete by December 2024.
- Establish clearer, more independent oversight of the program by creating a single, independent Investment Board appointed by the Metro Council and representing subject matter expertise in key areas of the system. This Investment Board would be responsible for making recommendations to the Metro Council regarding program goals, outcomes, affordable housing targets and data-driven key performance metrics as components of a new Regional Investment Strategy, to ensure homelessness is as rare, brief and non-recurring across the region as possible.
- Implement a direct feedback channel to the independent oversight body for direct service providers and those with lived experience with homelessness and housing instability to inform the development of the Regional Investment Strategy.
- Require counties to submit new Local Implementation Plans that conform with the Regional Investment Strategy and demonstrate feasible workplans to meet key performance metrics established by the Investment Board.
- Require Metro to set regional reporting frameworks, standards and definitions for service types and delivery; prepare monitoring plans, accountability mechanisms; approve housing projects, fund regional investments to improve system alignment, coordination and standardization within existing 5% administrative cap.

Feedback and lessons learned since the launch of SHS

Systems to monitor progress were not in place at the onset of the program.

At the program's onset, systems to monitor progress had not yet been created, leading to governance and oversight challenges. The Tri-County Planning Body (TCPB) established by SHS is still developing a regional plan with associated metrics, leaving local implementation plans without clearly defined goals and outcomes for creating a regional system of care. Compounding challenges included the absence of common SHS program definitions and standards and the lack of a data sharing agreement and related reporting practices. Although some reporting mechanisms are now in place, there is more work to do in this area.

The current structure lacks clearly defined roles and accountability mechanisms

The current SHS oversight and accountability structure has overlapping, ambiguous and challenging roles. The structure includes four government entities with both elected and programmatic responsibilities, and one fiscal and programmatic oversight body, the SHS Oversight Committee (SHSOC). Additionally, the TCPB is tasked with developing a plan for regional coordination related to regional capacity, systems alignment standards and metrics, and also oversees a regional investment fund to address homelessness across the region.

This complex structure has reduced the effectiveness of SHS investments in several ways, including but not limited to the following.

- Metro administers and facilitates the program, manages tax collection, and distributes tax revenue to counties.

However, Metro currently cannot direct SHS fund use or suspend funds if regional outcomes are not met. Although the SHSOC and Metro Council can recommend changes to county implementation plans and improvements to county SHS programs, they have limited means to compel county partners to act on or follow those recommendations.

- The SHSOC recommends ways to enhance SHS implementation in its annual report. The Metro Council may approve and delegate these recommendations to Metro staff. Yet the TCPB has a similar purpose: to create a regional plan to guide Metro and county SHS implementation. The lack of role distinction, overlap of responsibility, and absence of process alignment causes challenges and dilutes the effectiveness of efforts for all parties.
- The Metro Council is accountable to voters for SHS. Yet when confronted with major issues such as under-spending, contracting challenges, imbalance in populations served or inconsistent service definitions, the Metro Council has no meaningful or timely accountability mechanism with which to compel change. Furthermore, the Metro Council does not have a role in reviewing or approving regional plans or recommendations created by the TCPB. This has resulted in a system where Metro operates as a "pass-through entity" and not as an oversight and accountability body that ensures people experiencing homelessness are served effectively.

Feedback from members of the SHSOC reflects the need for clearer roles and lines of responsibility, including who is accountable to whom and for what. Members have shared that establishing consistent regional outcomes and metrics that are connected to work plans and program investments would better support system-wide delivery of homeless services. Feedback from both SHSOC and TCPB members also highlights structural issues and challenges, including insufficient enforcement authority and significant work with constrained resources and limited capacity. These challenges are compounded by overlapping and ambiguous duties between SHSOC and TCPB, leading to confusion about their respective responsibilities.

Collaboration and accountability must be better matched for effective governance.

Collaboration and co-creation are the assumed mechanisms embedded into much of the SHS structure. While all parties recognize and uphold these values in principle, in practice they can lead to inefficient and prolonged decision-making, which contradicts the urgency at hand, hinders progress, and sets the stage for interjurisdictional conflict.

Metro's role is to provide oversight and accountability for SHS, including by implementing oversight tools within financial and program reporting templates. The current SHS governance structure requires that Metro and the counties negotiate reporting and monitoring tools and practices. The prolonged negotiation process, in contrast to a feedback process that meaningfully incorporates input, means there is limited ability to provide appropriate oversight and accountability.

Reporting and transparency should be better aligned.

Metro and county implementation partners need to provide the public with accurate, accessible and up-to-date information about our successes and challenges in creating and managing this regional system of care. Due to reporting standards that are not yet sufficiently tied to regional outcomes and inconsistencies with reporting across the region, however, it has been difficult to consistently share progress and support the public's understanding of the work. Numerous stakeholders have advocated for improved transparency, reporting standards and accountability, as key necessities for maintaining community support of SHS.

Established metrics were not effectively linked to specific outcomes.

The SHS Work Plan, adopted by Metro Council in 2020, details several outcome metrics across the domains of housing stability, equitable service delivery, engagement and decision-making. Several of these outcome metrics are not linked to a specific numerical value, however. Further, current SHS intergovernmental agreements between Metro and each county state that counties "are not required to comply with any performances, rights, or obligations set forth in the Metro SHS Work Plan."

At the inception of SHS, the counties each had their own systems of care for homelessness, with separate data infrastructure and programming implementation. As Metro has worked to monitor the outcomes in the SHS Work Plan, there are clear inconsistencies across counties in the definitions, standards, and collection and reporting of data, limiting our understanding of impact at a regional scale.

One critical responsibility of the SHS Oversight Committee is monitoring program administration financials, which includes reporting on spending toward Populations A and B as defined in the SHS measure, which requires that each county allocate 75% of funds to services for Population A and 25% of funds to services for Population B. Due to the inconsistencies in definitions and reporting, Metro has not been able to identify what percent of spending by each county has served each population. Therefore, the SHSOC has not been able to fulfill this crucial responsibility.

The promise to the voters to have a regional system of care, with clear impacts, can only be fulfilled by having all three counties adhere to the same regional definitions and standards.

Lessons learned from the Affordable housing bond

A summary of lessons learned from Metro's 2018 Affordable Housing Bond is included at the end of this chapter, page 33.

2023 Metro SHS Audit and Management's response

The Metro Auditor, an independent, elected position, released an audit of the Supportive Housing Services program in January 2024. The audit noted that the complexity of the SHS governance structure has led to ambiguities and overlapping responsibilities that continue to hinder effective oversight. It also emphasized the need for a more streamlined and transparent governance framework to ensure better accountability and more effective oversight.

Additionally, the audit highlighted weaknesses in the performance measurement system, which hinders the ability to reliably track and assess program outcomes. This misalignment affects the quality of data available, making it difficult for stakeholders and the public to understand the program's impact. The audit stressed the importance of reliable data not only for current evaluations but also for future planning.

In its response to the audit, Metro management agreed with the Auditor's assessment that the current governance structure, while intended to incorporate diverse perspectives and maintain flexibility, has led to delays and ambiguity in decision-making, party responsibilities and information sharing. Management also noted that the layered oversight roles, including the Metro Council, County Boards of Commissioners, the SHS Oversight Committee and the TCPB, have created challenges in the efficient functioning of the program.

Management also agreed with the Auditor's recommendation to incorporate key performance measures to improve oversight and reporting.

The full audit report and management response, **Supportive Housing Services: Shared oversight reduces transparency and accountability, January 2024**, a report by the Office of the Auditor, is available at www.oregonmetro.gov/regional-leadership/metro-auditor.

Recommendations to improve accountability and oversight

After three years of this complex, multi-jurisdictional response to homelessness, this moment presents an opportunity to respond to lessons learned in actionable and measurable ways. The following recommendations seek to build on existing SHS commitments, make necessary adjustments to incorporate feedback, enhance and clarify oversight and accountability functions, and strengthen transparency and trust at all levels.

Renegotiate existing Intergovernmental Agreements between Metro and the three counties.

The Metro Council should initiate a re-negotiation of the SHS Intergovernmental Agreements between Metro and each of the three counties to improve transparency, increase accountability and strengthen oversight of existing SHS programs to the extent possible within existing framework. These negotiations should be completed by December 2024.

Strengthen and consolidate independent oversight.

As described previously, the SHS program's multi-layered governance structure includes overlapping and ambiguous responsibilities with limited enforcement and accountability mechanisms. To clarify roles, Metro should streamline and strengthen independent oversight and regional authority. SHSOC and TCPB should be consolidated into a single Investment Board appointed by the Metro Council. This board should have a narrower and more effective charge and its membership must represent the critical expertise necessary to fulfill it.

The Investment Board's oversight scope should be outcome-based and focus on the most critical regional strategies and decisions. Like the SHSOC and TCPB before it, the Investment Board should leverage existing work, lead with racial equity and center the voices of those who are most impacted by decision-making.

Investment Board membership

Membership of the Investment Board should reflect the diversity of expertise that is part of the region's broad network of housing and homelessness services. Areas of expertise to consider for membership include, but are not limited to, lived experience, homeless services, healthcare, behavioral healthcare, substance use disorder and treatment services, affordable housing development, finance, the justice system, data and performance.

Development of a Regional Investment Strategy

Supported by Metro staff and regional expertise on housing and homelessness, the Investment Board should develop and recommend a Regional Investment Strategy to guide local, program-level strategies. The Regional Investment Strategy should be developed by the Investment Board and recommended to the Metro Council for approval. The Regional Investment Strategy is discussed further below.

Implement a direct feedback channel to the independent oversight body.

To ensure the critical voices of direct service providers and those with lived experience are prioritized, a consistent, regular regional feedback model should be incorporated into Regional Investment Strategy planning and reporting processes. This engagement model would consist of two groups with a direct feedback channel to the Investment Board: people with lived experience with housing insecurity, and service providers and affordable housing operators.

Additionally, ad-hoc advisory groups should be formed to ensure the Investment Board is equipped with the technical research and industry knowledge necessary to develop regional outcomes and performance metrics.

Require new county Local Implementation Plans and work plans to conform to key performance metrics outlined in the Regional Investment Strategy.

SHS funding has supported an unprecedented expansion of the region's homeless service system of care. As described earlier, amid the program's launch, there was limited time and capacity to establish the TCPB and create a regional plan to guide local investments made through SHS revenue. Looking ahead, the Investment Board should create a Regional Investment Strategy to guide housing and supportive services work across the region. This strategy should establish a framework that includes regional outcomes, overarching goals, program definitions and standards, and key performance metrics (KPMs) necessary to monitor progress. The strategy should be completed every 3-5 years, with ongoing checkpoints throughout each cycle.

After approval of the Regional Investment Strategy by Metro Council, implementing partners would then create new Local Implementation Plans (LIPs) aligned with the strategy, to ensure regional, long-term goals are complemented by targeted, feasible, impactful actions at the local level.

The LIPs would include:

Proposed programmatic strategies and high-level budget estimates. Outline planned evidence-based programmatic investments, including the types of housing services to address homelessness, a description of budget amount estimated for each investment and other funding sources in addition to SHS funds.

Priority populations and investment distribution. Continue prioritizing original SHS populations with detailed implementation plans showing funding distribution tied to metrics for evaluating populations served.

Analysis of inequitable outcomes and development of racial equity strategies. Describe racial inequities in housing stability and access and include clearly defined mitigation strategies with a thorough racial equity analysis, as well as identified resource allocations to address disparities and ensure equitable access.

Inclusive community engagement. Detail how perspectives of Black, Indigenous, and People of Color, people with lived experience of homelessness, and culturally specific groups were included in the plan's development and will be engaged during implementation and evaluation, including a plan for an advisory body prioritizing BIPOC and people with lived experiences.

Any existing requirements of LIPs should also be considered for inclusion in future plans.

Key performance metrics (KPMs)

Most significantly, the success of this work requires a throughline between regional goals and outcomes to county-specific implementation plans, and metrics to measure and monitor progress over time. This should be accomplished through the development of new KPMs by the Investment Board. These could include:

- Clear and specific regional outcomes and goals.
- Quantifiable indicators used to evaluate progress.
- Direction on datasets for collection.
- Methods and tools for gathering relevant data.
- Processes for data analysis and interpretation to derive insights.
- Reporting systems for communicating results to stakeholders.

The Investment Board should establish a review cycle of KPMs to evaluate and refine metrics and objectives and review tools and processes for efficacy. As with all components of the Regional Investment Strategy, the Metro Council would approve these KPMs.

In alignment with the regional strategy, county-level LIPs would outline how counties would gather and report KPM-related data. Tracking KPMs is critical to indicate whether the programs funded with SHS tax revenues are effectively fulfilling the purpose of SHS programming. With this information, Metro and the counties can invest in programming that most effectively ends people's homelessness. Metro staff would develop and support tools, methodologies and other resources to assist county implementation, and would provide ongoing technical assistance as required to facilitate an effective feedback and refinement loop for improvements to the KPM approach.

How key performance metrics are used for oversight and accountability

KPMs are essential for ensuring transparency and accountability in the use of public funds. These specific, quantifiable indicators help track progress toward goals and objectives, allowing for an objective assessment of the performance and effectiveness of various initiatives. This objectivity is crucial for maintaining public trust, as it demonstrates that funds are being used efficiently to achieve intended outcomes.

In governance, KPMs align the efforts of different jurisdictional bodies with overall regional strategies, ensuring that all activities contribute toward common objectives. This alignment helps prevent resource waste and duplication of efforts. Additionally, data-driven insights from KPMs inform decision-making, enabling leaders to direct resources to areas needing improvement, or those that demonstrate effective outcomes – and justify expenditures and actions to stakeholders.

Continuous performance improvement is another significant benefit of tracking KPMs. By identifying strengths and weaknesses, these metrics enable targeted improvements and the sharing of best practices, ensuring that services evolve to meet changing needs effectively. Moreover, benchmarking through KPMs allows organizations to compare their performance over time and against industry standards, demonstrating accountability and a commitment to high standards.

Establish a regional system of care through standards of practice and definitions.

Most people do not confine their lives within one county. The experiences of homelessness are similarly not limited to jurisdictional boundaries. Many of the resources and supports on which we all rely – transportation, healthcare, employment, food, cultural communities, and others – exist and operate across city and county lines. So, in resolving their housing instability, the people served by SHS regularly access community-based organizations and other social services throughout the region. Limiting people to services in the community in which they began receiving them, or having differing standards of service from provider-to-provider, unnecessarily complicates and limits a person’s path to long-term stability.

Clear, consistent definitions and standards of practice are cornerstones of a successful system. Both are required to create and maintain validity and quality of programs and data. Both are also required to ensure equitable service delivery across providers. Without quality assurance, equitable compensation standards across providers becomes challenging, and tailored service models may fail to offer commensurate supports, ultimately impacting individual outcomes. Clarity and consistency in who is prioritized for services, and how those services are delivered, allows better measurement of program effectiveness, ensures consistent adherence to proven practices, enables clear communication of progress, and identifies areas needing improvement.

Examples of regional outcomes:

- BIPOC households are housed at a rate equal to or greater than their estimated representation in the population of people experiencing homelessness
- Households placed into permanent supportive housing using SHS funds experience reduced numbers of emergency room visits compared to households experiencing homelessness
- At least 90% of households placed into housing with SHS funded rental assistance maintain housing for at least 24 months

Examples of regional indicators include:

- Annual eviction rate of people placed out of homelessness into SHS-funded housing
- Length of time BIPOC households are in shelter before being placed in housing, versus the length of time for non-BIPOC households
- Percentage of people who remain housed for at least 24 months after placement into permanent supportive housing



Children’s discovery space at Fuller Station Apartments in Happy Valley.

A more consistent and aligned approach to definitions and quality standards will support a more responsive and transparent system. Regardless of the community in which they live, households can expect appropriately-funded, quality services that are culturally responsive and tailored to their needs. Quality standards and definition alignment allow for improved reporting and better communication with and between providers, participants and the public.

Effective tools are needed to achieve this alignment. Standardized data collection and reporting practices that support consistent documentation of aligned data elements, accompanied by reporting guidelines and systems, support increased visibility into outputs and key performance metrics. This in turn supports tracking and reporting on longer-term regional outcomes, and strengthened data-sharing practices within the system. Consistent with existing roles, Metro should develop the tools, process and standards for data collection and reporting for activities and investments funded by SHS.

Metro should also continue work that is already underway through its quality and compliance team, to create monitoring and evaluation tools that improve alignment of standards. A more thorough, data-driven approach to performance evaluation – tied to the Regional Investment Strategy and key performance metrics established by the Investment Board – will allow Metro, counties and providers to see over time what strategies are working. It also allows for improvements to be implemented more quickly, and to communicate what has informed program changes. Additionally, standardized monitoring tools and processes can help to transparently assess how well implementation partners are maintaining requirements and commitments.

Across all types of evaluation, it is vital that Metro, county partners and the Investment Board hear feedback from those closest to the work, including service providers and the experiences of those who receive SHS-funded housing and services. Qualitative reporting and robust engagement practices must also be a key element of this improved framework.

Lessons learned: Metro Affordable Housing Bond

Metro compiled the following list of lessons learned from jurisdictions' annual report presentations to the Housing Bond Oversight Committee and from jurisdictional partners and technical experts:

Site acquisition: Site acquisition is a helpful tool. The use of bond funds to acquire property brought affordable housing to strategic locations throughout the region and helped to remove barriers for smaller organizations to participate in affordable housing development. Future site acquisition efforts should maintain this intentionality while improving efficiency by ensuring there is clarity of jurisdictional and sponsor roles throughout the development process. Future efforts should also consider flexible tools that can be responsive to opportunities in the market.

Predevelopment funding: Lack of this funding is a persistent issue for affordable housing development and a barrier for the ability of smaller organizations, including culturally specific organizations, to participate in development. This challenge is deepening as operating cost escalation puts smaller, nonprofit organizations into more difficult financial positions. However, due to restrictions of general obligation bonds, the Metro bond funds are not able to be used to support predevelopment activities.

Funding coordination: Coordination with funding partners, including Oregon Housing and Community Services, is essential to the success of a local gap funding program. Alignment on timing and criteria among state and local funders will reduce risks and impacts of cost escalation for affordable housing developments. Opportunities exist to streamline funding to reduce complexity for affordable housing developers and improve outcomes across funding streams.

Affirmative marketing: Community networks are critical for equitable access. Affirmative marketing strategies, including partnering with culturally specific organizations and service providers, have led to successful and timely lease-up processes for bond-funded properties. In addition to ensuring fair housing access, timely lease up is also essential for the financial stability of a property.

Deeply affordable units: Deeply affordable units have higher operating costs and require an array of resident services and other supports to meet needs and ensure long-term property stability, requiring additional nonleasable space to support offices and other service areas. This can be especially true in high quality permanent supportive housing. Future funding opportunities should consider the unique funding needs of different unit and property types and levels of affordability, as well as the impacts of changing economic conditions.

Regional standards and best practices: Throughout the implementation of the affordable housing bond, Metro convened jurisdictional partners and stakeholders to develop regional standards to support best practices in the industry, provide clarity and guidance on policy goals, establish metrics and benchmarks to track progress and outcomes, and build relationships that have the potential to improve coordination. For example, Metro established regional net cash developer fee guidelines to support fiscal stewardship and racial equity. However, more evaluation of the unintended consequences of net cash developer fee caps is needed to ensure these policies do not impede small nonprofit and culturally specific organizations' ability to respond to cost escalations or build organizational capacity.

Balancing local discretion and regional alignment: Allowing for local discretion can support jurisdictional partners in addressing local housing priorities, but it can also make regional accountability and transparency more difficult. While balancing local discretion with regional alignment can prove challenging, such efforts result in stronger outcomes and more consistency and transparency in reporting on outcomes.

Communication and engagement: The bond program has been successful at creating new affordable housing that is specific to the needs of each community. Metro and its partners should proactively share the success of this and any future programs with partners, local leaders and voters in a way that resonates with their values and priorities

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Investment recommendations

In recent years, voters across the region came together to invest in comprehensive, regional solutions to address homelessness and housing instability for individuals and families. These investments benefit us all through stronger, more resilient communities. These investments are making a real impact on our housing and homelessness crisis.

For some experiencing housing instability and homelessness, financial support in preventing an eviction or accessing an affordable home is all that's needed. But for those experiencing long-term homelessness – many of whom have disabling conditions caused or exacerbated by the traumatic experience of homelessness – additional supports can help them access and maintain housing. The Supportive Housing Services (SHS) measure, passed in 2020, sought to build upon the 2018 Metro Affordable Housing Bond, by providing flexible supportive services that could be tailored to meet the needs of those experiencing or at risk of homelessness.

Together, the Metro Affordable Housing Bond and SHS are contributing to the development of regional infrastructure and systems to deliver housing and services to those in need. The regional scale of these investments is critical to expanding fair housing opportunity and choice across the region.

Recommendations

In recent months, Metro has conducted research and analysis and engaged with community leaders, practitioners and experts to understand opportunities and priorities for future investments. Through these conversations, these priorities have come into focus:

- Expand the use of SHS funds to allow acquisition, construction and preservation of affordable rental housing and permanent supportive housing, with sufficient flexibility to complement county SHS investments.
- Strengthen SHS commitment to serving those experiencing or at risk of chronic homelessness.
- Invest in regional strategies: require Metro to set regional reporting frameworks, standards and definitions for service types and delivery; prepare monitoring plans, accountability mechanisms; approve housing projects, fund regional investments to improve system alignment, coordination and standardization.

Some of these recommendations are achievable within the current SHS structure. Others will require voters to approve changes. Improving the coordination and impact of regional housing investment will also require new and improved regional structures and systems, including a significant role for Metro and a regional oversight body to support clear and consistent funding requirements, enhanced transparency and accountability, and better outcomes through defined regional performance measurement.

The Oversight and Accountability and Revenue chapters of this recommendation provide deeper discussion of recommendations for SHS taxes and accountability and oversight. This section focuses on recommended strategies and priority populations for future investments in housing and supportive services.

Expand the use of SHS funds to allow acquisition, construction and preservation of affordable rental housing and permanent supportive housing, with sufficient flexibility to complement county SHS investments.

Metro heard support from many stakeholders, partners and community members for broadening the allowable uses of existing SHS revenue to create a “braided” funding source for both affordable housing and supportive services. This integration can achieve better coordination and management of investments than efforts conducted separately, and it provides us an opportunity to continue our progress toward positive, demonstrable, long-lasting impacts for those we serve.

If an expansion of allowable uses were approved by voters, Metro should ensure that SHS revenue continues to prioritize the development of a regional homeless system of care and funding for a range of flexible investments proven to be effective in homelessness response, housing access and placement, and ongoing wraparound support services. Metro should also continue to fund short- and long-term rental assistance – with improvements to regional coordination, alignment and accountability to shared outcomes. Given that homelessness is only ended when a household is permanently housed, investment strategies and reporting should demonstrate a clear connection between investments and the ultimate goal of placement and long-term stability in permanent housing. The goal is to create better access to housing for those experiencing chronic homelessness or at risk of chronic homelessness.

If SHS funding is used for affordable housing, investment criteria should be responsive to changing needs and economic conditions and allow for new construction and preservation of affordable rental housing, as well as acquisition and conversion, with a priority focus on strategies that best contribute to established SHS outcomes and needs.

Funding for affordable housing should also allow for strategies that lower the cost of development or improve outcomes, including for supportive housing services. Strategies to consider could include:

- Predevelopment support to cover early-stage activities such as planning, design and securing permits, as well as strategic land acquisition.
- Funding to support operational needs through strategies such as expanded operating subsidies, enhanced payment standards or operating premiums, capitalized reserves or further supplementing existing risk mitigation pools.

Any change to allowable uses of SHS funding should also provide flexibility for local implementation partners to create and execute strategies that meet the needs of their communities and complement supportive services investments.

Permanent supportive housing

Together, Metro’s Affordable Housing Bond and SHS have created hundreds of permanent supportive housing units across the region – again with the help of local implementation partners and a variety of providers, community organizations and neighbors.

Permanent supportive housing combines affordable housing with comprehensive support services designed to help individuals and families achieve stability and maintain long-term housing. This approach has proven effective for people experiencing chronic homelessness, people with disabilities, those with severe trauma and health challenges, and other vulnerable populations.

The key components of this approach include safe and affordable permanent housing, rental assistance, and on-site or community-based services. These services are tailored to meet the unique needs of each household, which might include services like housing stability and behavioral health supports, employment and life skills development, or case management. The goal is to address the root causes of homelessness and provide the necessary resources for residents to live independently.

Currently, SHS funds cannot be used to fund construction or purchase of affordable housing units. Voters would need to approve a change for funds to be allowable for this key component of permanent supportive housing.

Permanent supportive housing has been proven to be an effective long-term housing solution for communities due to its holistic approach. Research shows it reduces homelessness, improves health outcomes and enhances quality of life for residents. This approach also helps the overall system through funding proven solutions, reducing strain on expensive emergency services such as shelters, hospital emergency rooms and other public services.



Danica, resident services coordinator at Heartwood Commons, works alongside two housing case managers and a clinical case manager, who help residents with things like goal setting, connecting to employment and accessing healthcare resources.



Heartwood Commons is a converted motel with 54 studio apartments and supportive housing services managed by Community Partners for Affordable Housing. Washington county purchased and renovated the building with Metro Affordable Housing Bond funds and opened its doors in 2023 as the county’s first permanent supportive housing community. Case management and other resident services are paid for by Metro’s Supportive Housing Services fund.

Strengthen SHS commitment to serving those experiencing or at risk of chronic homelessness.

All people need safe, stable homes – and the region does not have enough supply, particularly for people with the greatest need. Moreover, people who have experienced long-term or repeated homelessness, compounded by disabilities and a cycle of trauma, also often need comprehensive and ongoing supportive services to achieve housing stability.

While we need to continue serving all who face housing instability, we should establish a level of priority for serving people experiencing, or at risk of, chronic homelessness (Population A) in future affordable housing investments that use SHS funds. During the engagement process, stakeholders and partners nearly unanimously advocated for continuing this focus to maintain and complement existing commitments.

To support priority populations in a way that truly addresses chronic homelessness, programmatic investments supported by SHS should be responsive to the changing needs of the community and equip partners to serve a range of needs. That includes providing high-fidelity services, based on proven models, that adhere to regional standards for both quality and funding. Additionally, services should be measured to demonstrate that they meet desired regional outcomes. Supportive housing investments, especially permanent supportive housing, should include program standards and flexibility. This will allow service providers to tailor supports to serve those with marginalized identities and evolving, intensive behavioral and physical health needs.

Funding should also contribute to proactive coordination across systems, including with housing providers, to ensure comprehensive support. This may mean tiering funding

award to service acuity level to accommodate increased staffing, clinical and culturally-responsive supports, and system integration. SHS-funded permanent supportive housing should be adaptable and appropriately resourced – supporting a long-term strategy to stabilize households. Investments should include strategies to ensure geographic distribution of investments and equitable access to housing and services for BIPOC households, who are disproportionately represented among those experiencing homelessness due to historic and ongoing economic marginalization, higher rates of incarceration, and the health impacts associated with these system inequities.

We know that people’s circumstances, health and needs change over time. Regional housing investment should match households to the supports they need, and shift those supports as household needs change.

Additionally, people in this region live, work and recreate across county and city lines. Affordable housing investments that use SHS funding should allow for improved transferability across counties, providers and program types, leveraging SHS funding flexibility to support increased stability for those it serves. This can be achieved through investing in system-level process improvements, such as a strengthening of the system’s ability to overlay longer-term supportive services and rental assistance for households that have been placed out of homelessness using short-term supports, but that are again at risk of homelessness. Seamless portability of services meets the real need of our communities and empowers those we serve to make choices about where to live.

Invest in regional strategies

An integrated regional system – of both affordable housing and supportive services – will require centralized coordination and support, and continued investment in strategies to ensure these taxpayer-funded programs are effective and efficient.

Priorities for these regional focuses should include:

Capacity, training and technical assistance

Metro has learned the importance of investing not only in affordable housing units and services, but also in the organizations and workforce that support them. Metro should continue to develop and implement strategies that further workforce development, living wages and training in social services, construction, property management and other fields.

Culturally responsive and trauma-informed approaches across service delivery and housing operations systems.

People across the region continue to experience identity-based marginalization. That's why Metro is committed to an intersectional approach to addressing homelessness, while recognizing race as the biggest predictor of a person's experience of homelessness. This is possible due to transformative services provided by culturally specific community-based organizations working directly with those transitioning from homelessness to stable housing. SHS investments should continue to prioritize culturally specific and trauma-informed strategies to address people's experiences of homelessness. This includes culturally-specific programming, disaggregated data and engagement practices to ensure that impacted communities have a voice in decision-making.

Training tomorrow's housing services workers and providing new paths to stability

Funded by Metro's Supportive Housing Services program, in 2023 Washington County launched a housing careers pilot program focused on workforce development, with the aim to provide individuals who have first-hand experience of homelessness and marginalization with training and a career pathway within housing services fields. Participants, many of whom identify as BIPOC or LGBTQIA+, underwent training and a 500-hour paid internship with local housing service providers.

Partner organizations like Worksystems and IRCO provided career coaching, recruitment and support to bolster the program's outcomes. This approach has compounding benefits – not only does it enhance a person's stability through earned income and a career supporting others with common experiences, but it also helps address the workforce shortages that limit our collective impact.



4D Recovery co-founder and executive director Tony Vezina works with students Carlos and Colbert

Regional quality standards and definitions

Stakeholders have expressed the need for well-coordinated quality and compensation standards that effectively support providers in responding to the full range of community needs – including households that require intensive, long-term supportive services.

For future regional affordable housing investments, Metro should develop new regional underwriting guidelines tailored to unit size, affordability level and other factors that impact cost and viability. Housing providers and funders have given clear feedback that capital investments should include funding for predevelopment costs, as well as some form of operating premium, capitalized operating reserve or regional risk mitigation pool to support property stabilization needs over time.

For services investments, Metro should include population-based standards aimed at ensuring quality services and funding for the types of interventions that can most effectively meet a full range of acuity of need. This would also include regionally aligned payment standards and terms for rental assistance as well as programmatic quality and payment standards for the provision of supportive services.

Systems coordination and alignment

Whether or not allowable uses are expanded, SHS funding should continue to support partners in integrating and aligning efforts across the systems that must work together well to have real impact on homelessness, as poor coordination can worsen outcomes for the people these systems are intended to serve.

Too often, a person must successfully navigate multiple complex systems that are difficult to access to achieve housing stability. High-quality supportive housing services are comprehensive, holistic and accessible. They seek to address barriers and support increased stability across a range of needs – such as food security, employment, education, health, substance use or legal issues. However, as these barriers compound for households and communities, it can be difficult for individual providers to convene partners to address gaps and improve systems while also fulfilling their vital role of direct service provision and coordination.



Built with funds from Metro’s affordable housing bond, Nueva Esperanza provides homes for 150 households with an emphasis on meeting the needs of farmworkers, and Latine and Somali immigrant families.

Whether or not allowable uses are expanded, Metro should continue to support SHS implementation partners in integrating and aligning efforts across systems, improving coordination and outcomes. More detail on these recommendations is in the Oversight and Accountability chapter.

If SHS allowable uses are expanded to include capital affordable housing and permanent supportive housing, Metro should create guidance that supports strategic weaving of capital funding with ongoing operating and services investment to ensure this affordable housing is financially and operationally stable. With the above-mentioned regional standards and definitions serving as a foundation, Metro can support the system in achieving more alignment with state and federal funding where it amplifies impact or reduces risk and cost. Metro should also collaborate with other funders to ensure clear outcomes and award funding based on quality – not necessarily the lowest price, which encourages an underestimation of real cost and contributes to emergent operating shortfalls.

Investments in regional system supports

While counties have infrastructure and expertise in delivering services at the local level, there are many opportunities and efficiencies to be gained by developing regionwide strategies and investments. Some providers have grown rapidly in a relatively short period of time, while other providers are expanding their purview to provide these types of services or building their capacity from the ground up to meet this need. Metro should coordinate technical assistance, training and capacity building, and streamline investments to support the organizational health of housing and service providers to achieve better outcomes for those we serve.

Potential Affordable housing production scenario

As noted in this chapter, housing funders, developers and operators need to be responsive to changing conditions and needs throughout the life of SHS funding, particularly if voters were to approve an extension of the current sunset. The creation of an Investment Board and Regional Investment Strategy (discussed further in the Oversight and Accountability chapter) should allow for adapting investment priorities to meet need over time.

An evolving strategy can increase the region's ability to respond to changing needs and conditions, thereby enhancing stability. It may also require that regional and county production targets be set for shorter periods of time, rather than the full horizon of SHS funding.

To illustrate, an evolving regional housing strategy might mean that rather than emphasizing new construction for an investment cycle, a priority might be taking advantage of a specific market condition or acute need. Examples of this scenario include the current condition that allows for acquisition and conversion of newly built market-rate units at a total cost well below new construction, or funding preservation of properties with expiring affordability in properties serving highly vulnerable residents most likely to experience homelessness upon conversion, such as BIPCO, older adults, people with disabilities, or other marginalized communities.

In another scenario the Investment Board might recommend a focus on increasing the regional supply of a specific unit type for a period of time – for example, larger unit sizes to accommodate large households in response to a demonstrated need for this unit type – as a strategy that best meets the evolving needs of SHS service populations.

The following is an illustration of regional opportunities to expand affordable housing inventory over the coming decade, followed by a high-level overview of critical assumptions for these investments.

Private Activity Bonds and Affordable Housing

Private Activity Bonds (PABs) are a key source of funding available for both affordable housing development and preservation. When committed for affordable housing, they bring the availability of federal resources through the federal Low Income Housing Tax Credit (LIHTC) program. The 4% LIHTC is only available when paired with PABs. Nearly all affordable housing produced through the 2018 Metro affordable housing bond leveraged LIHTC, illustrating the importance of this funding source to regional development.



Terrace Glen Apartments in Tigard was funded by Metro's Affordable Housing Bond.

To access the 4% LIHTC, fifty percent of the project must be funded with PABs. However, in recent years Oregon has reached our cap on the allocated amount of PABs, creating development pipeline delays that increase cost and funding uncertainty. Given the current backlog in demand, developers can expect that PABs may not be more fully available to leverage with new projects until at least 2026. Thoughtful coordination between the state and local funders will be necessary to ensure local investments do not anticipate more PAB availability than is projected, and contribute to oversubscription of PABs.

Enhancing SHS-funded capital investment, years 2026-2030

If voters approved an expansion of allowable uses, the first five years of SHS-funded capital investment would likely be enhanced by a portion of the existing carryover from the first few years of SHS tax collection.

Given constrained private activity bond (PAB) availability in the state of Oregon and a time-limited market condition that allows for highly opportunistic acquisition and conversion of existing properties, it may make sense to make roughly half of this proposed carryover available to support more immediate acquisition opportunities. Acquisitions can expand the pool of regulated, deeply affordable housing quickly, often in higher opportunity areas, and can do this at an overall cost that's currently much lower than new construction. However, affordable housing developers have struggled to take advantage of this opportunity due to insufficient funding availability.

In that case, allocating funding to this strategy, while distributing the remaining carryover over several years could allow the region to achieve increased production of deeply affordable units and permanent supportive housing in a relatively expedient manner while staying well within the region's projected private activity bond and state funding availability.

Through this sample combination of investment strategies, regional housing investment with SHS funding could be expected to achieve something in the magnitude of the following:

Potential production through new construction and acquisition Years 2026-2030

	Clackamas	Multnomah	Washington	Regional total
Newly constructed units	160-185	340-395	250-290	750-870 units
Acquired and converted units	65-75	135-160	100-115	300-350 units
Total units produced				1,050-1,220 units

Much of this housing could feasibly be programmed to serve those exiting long-term homelessness and with ongoing supportive service needs. And many of these units could be made available to households much sooner than traditional development allows – improving the region's ability to respond with urgency. These units could be expected to cost between \$320,000 and \$350,000 on average in capital investment over the five-year period, across both acquisitions and new construction.

Ongoing capital investment, a consistent regional resource

Following an initial capital investment cycle supported with existing SHS revenue carryover, the system could settle into a longer-term cadence of regular funding availability for prioritized housing investments, with those priorities articulated through regional and local planning efforts. In this way, the system will meaningfully balance predictability with responsiveness.

To illustrate the potential impact of this ongoing availability of funds, given thoughtful and quality-focused investment in an array of sizes of the most deeply affordable units and allowing for permanent supportive housing as service and rental assistance funding allows – we might expect to see this range of affordable housing production for a second, five-year period:

Potential production through new construction

Years 2031-2035

	Clackamas	Multnomah	Washington	Regional total
Newly constructed units	105-120	230-260	165-190	500-750 units

Given rising costs and conservative leverage assumptions, units over this second five-year period would be expected to average closer to \$425,000 per unit in SHS-funded capital investment.

Though these estimates represent possible production over five-year periods, it's worth noting that for both sets of estimates above, but especially in years without supplemental carryover, county partners would likely need save earmarked revenue over the course of a few years to adequately fund one or more housing developments. For the 2031-2035 modeling above, for example, Clackamas County might need to save funding for 2-3 years to fund one 50-70 unit single-site permanent supportive housing project, while Multnomah County – given a bigger proportional allocation of SHS revenue – would likely be able to fund a similar project every 1-2 years.

Critical assumptions

For the estimated production ranges above, BAE Urban Economics used the following assumptions, intended to represent a highly conservative and purely illustrative example for 10 years of regional production opportunity:

Funding distribution

- Clackamas County: 21.33%
- Multnomah County: 45.33%
- Washington County: 33.33%

New construction

- 100% of units produced are deeply affordable (30% AMI), with the possibility to create permanent supportive housing, contingent on service and rental assistance funding availability. Assumed payment standard for units supported by Regional Long Term Rent Assistance (RLRA) would be commensurate with 80% AMI rents; where RLRA unavailable to leverage, assumption of some operating support to achieve 30% rents
- The unit mix for this modeling is 70% 1 bedroom, 20% 2 bedroom, 10% 3 bedroom
- Units produced are assumed to include adequate office and service space to provide high-quality on-site supportive services, with roughly 40% of space non-leasable.
- Annual development cost escalation is modeled at 6%, reflective of current conditions
- \$75,000 per unit in assumed Oregon Department of Housing and Community Services gap funding, a conservative assumption given that current funding maximums are substantially higher

Acquisition and conversion

- Units acquired are assumed to be regulated at a mix of affordability levels (30-60% AMI), with the possibility to create permanent supportive housing, contingent on property attributes, service and rental assistance availability for between 50-100% of units
- 100% of units are modeled as 2 bedrooms, given estimated average cost for this unit type. Total unit cost is assumed to average between \$290,000 to \$350,000 per unit, depending on achieved affordability level and available debt leverage, based on a review of current market listings.

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The Supportive Housing Services measure (SHS) brought new revenue streams into the homeless services landscape and new high-earner personal and business income tax revenue sources to Metro.

SHS applies a 1% tax on taxable personal incomes over \$125,000 for individuals and \$200,000 for those filing jointly, and a 1% tax on taxable income for businesses with at least \$5 million in revenue. The taxes are scheduled to end, or sunset, after tax year 2030. This means that, absent any changes to the existing law, revenue will stop being collected on income earned after that date. Counties will then need to find alternative funding or cease operation of recently created SHS programs.

Revenue was a key area of discussion during Stakeholder Advisory Table meetings and other engagement in recent months. Metro received valuable feedback about the need for ongoing certainty of services funding beyond 2030 as well as recommendations on changes to the personal income tax, regarding who is taxed and at what rate.

In addition to these conversations, Metro engaged deeply with stakeholder groups representing homeless services, affordable housing, jurisdictional interests and economic issues. Metro also worked closely with county partners to better understand their needs for success.

Recommendations

Strong support for the following recommended changes to SHS revenue systems was expressed throughout discussions.

- Extend the SHS sunset enough years to leverage rent assistance for affordable housing development and ensure long-term stability of services for people experiencing chronic homelessness.
- Dedicate a minimum percentage of funds to capital investments in affordable housing and permanent supportive housing. A portion of existing carryover would be used for immediate investment opportunities, and future capital funding allocations would be driven by the Regional Investment Strategy and Local Implementation Plans.
- Index the SHS personal income tax thresholds to inflation, starting in tax year 2024.

Before further describing these recommendations, the next section provides background information on revenue collections, lessons learned from program implementation, predictability of income tax revenue and feedback from stakeholders.

Background information on revenue collections and tax structure, program implementation and stakeholder feedback

Higher than anticipated collections

Discussions between housing advocates and local jurisdictions about a potential region-wide SHS funding measure began in 2019. Attempts were made to quantify the amount of funding needed to provide services to community members in need. Coming out of those discussions, an original goal was to raise \$250 million annually.

SHS tax collection began in 2021. Approximately \$240 million was collected in the first fiscal year, from July 1, 2021 through June 30, 2022, while \$337 million was collected in the second fiscal year, July 1, 2022 through June 30, 2023.

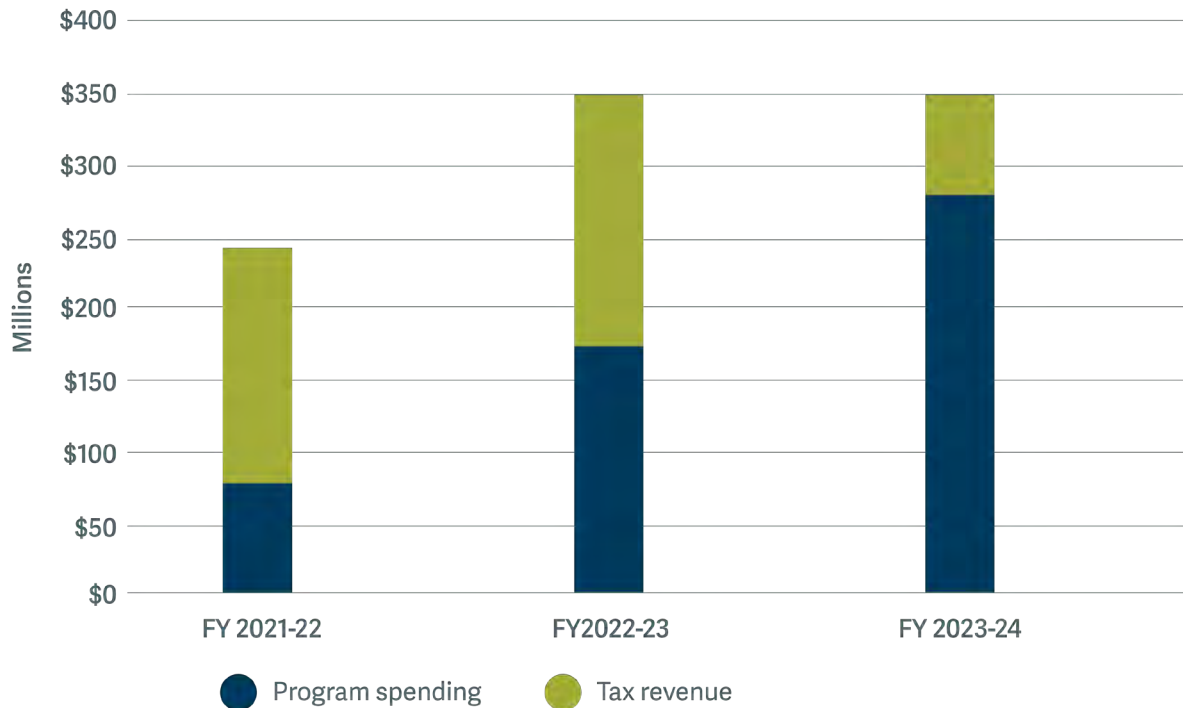
Higher than anticipated revenue was driven by significant economic growth for high-wage earners and large businesses coming out of the pandemic. Late tax payments from the prior fiscal year, received in the second year of collections also contributed to the higher revenue. During that same time, inflation increased steadily and significantly, leading to increased operational costs in areas like shelter siting and operations, rent assistance, labor and service supplies.

Program development ramp up

While revenues began to flow immediately from Metro to counties, program development took time to ramp up. Counties were building out new programs or, in the case of Multnomah County's Joint Office of Homeless Services, a new scale of programming, which took time to thoughtfully design and implement. As of this time, county programming is almost fully built out, which can be seen in the level of spending for Fiscal year 2023-24 on the graph below. This critical design and planning time, along with robust collections in Fiscal year 2022-23, caused large balances to accrue to the counties, which are now available to support one-time-only investments, such as system investments and increases in scalable programming. As mentioned in earlier chapters, SHS funding cannot currently be used for capital expenses to build or purchase units for housing. However, it can be used for other one-time investments. Counties have developed plans to spend down these accrued balances over the next several years, beginning this year.

Supportive housing services tax revenue and program spending

Source: Metro Finance and Regulatory Services department, June 2024.



Volatility inherent in tax structure

In the initial years, tax revenues were higher than originally expected, primarily driven by economic growth coming out of the pandemic. However, in the current year, actual collections are expected to be below the most recent forecast. This is driven by current trends such as high interest rates and a relatively poor local economy which result in lower tax revenue.

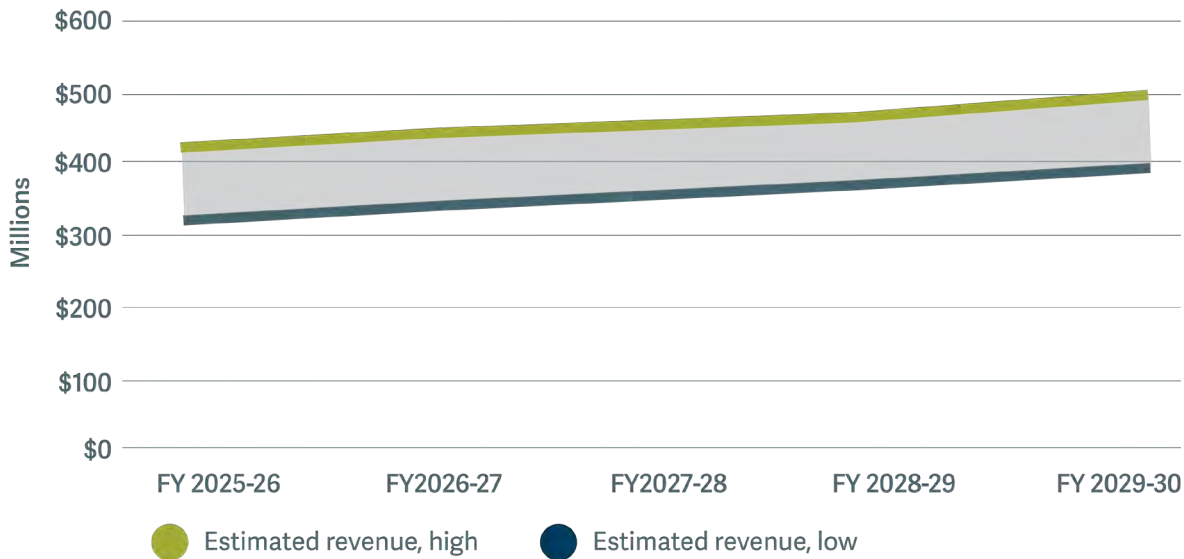
Significant variances between projections and actual revenues are inherent in income taxes – this can be seen in other jurisdictions in Oregon and across the country. This volatility is especially true with high-earner and business income taxes because of year-over-year fluctuation in income streams like capital gains and net income from sales, which represent a significant portion of revenue collected from these taxes.

The relative newness of these taxes and the changing economic environment make determining an appropriate range of

uncertainty in revenue forecasts especially challenging. However, given the scale of unknowns today, a reasonable range between a low-revenue year and a high-revenue year is \$100 million. The range will change as forecasts are updated and actual revenue collections are received each year. The accuracy is higher for the first 12 to 18 months of each forecast, and as the timeframe extends, the uncertainty increases due to a number of factors.

The volatility of these taxes creates a challenge when used to fund a program with steady costs. The heart of this program is permanent supportive housing – long-term rent assistance and services combined with affordable housing to help people stay housed. Because the revenue sources are and will remain uncertain, Metro should create a program and oversight structure that is nimble enough to adjust to changing circumstances, while continuing to deliver and hold parties accountable.

Supportive housing services revenue forecast, FY2026 to FY2030
 Source: Metro Finance and Regulatory Services department, June 2024.



What we heard: Stakeholder feedback on SHS revenue

Over the last few months of engagement, stakeholders emphasized the importance of spending existing tax dollars efficiently, creating long-term certainty around program funding and acknowledging potential economic fluctuations.

- **Balancing revenue needs against tax burdens:** Stakeholders overwhelmingly acknowledged the need for ongoing supportive services for those experiencing or at risk of homelessness. However, concerns were raised about the long-term viability of SHS taxes, particularly the tax differences between Multnomah County and the rest of the region, become better known and more pronounced. As early indications show that households at all income levels are migrating away from the region, particularly Multnomah County, which some experts attribute to the combination of high taxes and a perceived lower quality of life.

- **Prioritizing efficiency:** Stakeholders emphasized the importance of responsible fiscal planning and adaptability within the SHS program. The stated need for supportive services exceeds the region’s capacity for raising revenue. As a result, we must prioritize the use of dollars to maximize outcomes.
- **Acknowledging economic uncertainty and establishing long-term stability:** Recognizing the potential for unexpected revenue fluctuations, stakeholders stressed the need for establishing long-term certainty around SHS funds to ensure consistent funding for critical services.

Research and discussions with the Stakeholder Advisory Table and other stakeholders emphasized the need to acknowledge both the uncertainty and potential scarcity of resources when managing revenue streams. At the same time widespread support was voiced for innovative problem solving in the face of those scarce resources and uncertainty.

Recommendations for SHS revenue, taxes, and allocation for affordable housing

Extend the SHS sunset

Long-term funding certainty is key to success of the SHS programs currently underway, as well as future affordable housing investments. – With long-term funding, households know they won't lose their rental assistance and housing providers know the rent payment they depend on to fund housing operations will continue to arrive. Reliability of a funding source encourages service improvements and private investment, and allows for greater participation in affordable housing development. With a long-term funding source, communities have the opportunity to undertake multi-year housing initiatives that otherwise would not be available with a near-term cut-off – supporting a more sustainable regional housing system.

Without an extension, there will be no SHS tax revenue from income earned after 2030. The Metro Council should consider asking voters to extend the SHS tax sunset far enough beyond 2030 to create efficiencies and leverage rent assistance to finance affordable housing projects. This extension should be accompanied by enhanced oversight and accountability measures described in the relevant chapter of this recommendation.

Allocate portion of funding for affordable housing

If voters approve an expansion of allowable investments with SHS funding to include capital investments in housing along with services, the Investment Board described in the Oversight and Accountability chapter should identify a percentage of revenue, as well as a portion of existing carryover and future underspend, to dedicate to affordable housing development, preservation and acquisition. For example, this could look like dedicating a minimum of 10% of ongoing funding, \$200 million of current FY2024 carryover and some portion of future annual underspend to affordable housing. See Investments for an example strategy and outcomes for affordable housing investments (pages 42-45).

Index personal income tax threshold

To maintain the intent that these taxes only apply to businesses and high-income taxpayers amidst rising costs, Metro should annually increase the SHS personal income tax threshold, similar to annual increases to the federal standard deduction. Indexing the tax threshold decreases the likelihood of middle-class households becoming taxpayers due to inflation rather than an actual increase in purchasing power. This could be done without needing a ballot measure.

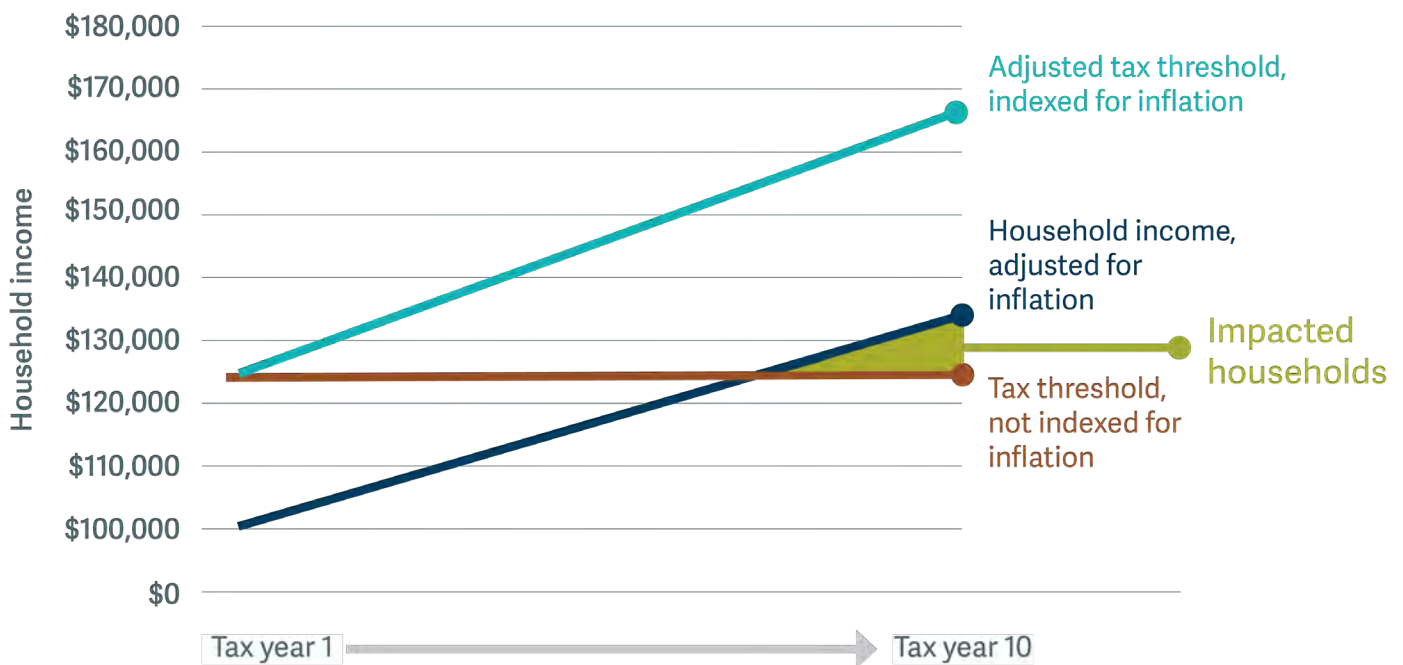
Why should income exemption levels adjust each year by some measure of inflation?

Over time, inflation can erode the purchasing power of each dollar earned. Small amounts of inflation are important to sustaining an economy. A small amount of inflation encourages consumer spending which is responsible for over two-thirds of the economy – if there was no inflation or prices were falling, people would wait to buy goods or services at lower prices.

That reduction in purchasing power is, at least in an economy-wide sense, typically partially alleviated through increases to wages. Annual social security payment adjustments as an example. This is also why, typically, tax systems adjust income thresholds by inflation.

Over time, failing to index a tax to inflation may increase the chances that the policy is taxing households that were not intended to be taxed.

Example: Households impacted by taxes not adjusted for inflation



Appendices

Stakeholder Advisory Table summary

Community engagement summary

Public opinion research summary

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Stakeholder Advisory Table summary

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2024 Metro Regional Housing Stakeholder Advisory Table

Summary Report

Prepared by the Drawbridge Innovations consulting team | July 2024



drawbridge
- innovations-



Metro

Background

Metro convened a Stakeholder Advisory Table (SAT) in the spring of 2024. The purpose of this SAT was to advise Metro Chief Operating Officer Marissa Madrigal on elements of a recommendation to the Metro Council regarding options for future regional housing funding.

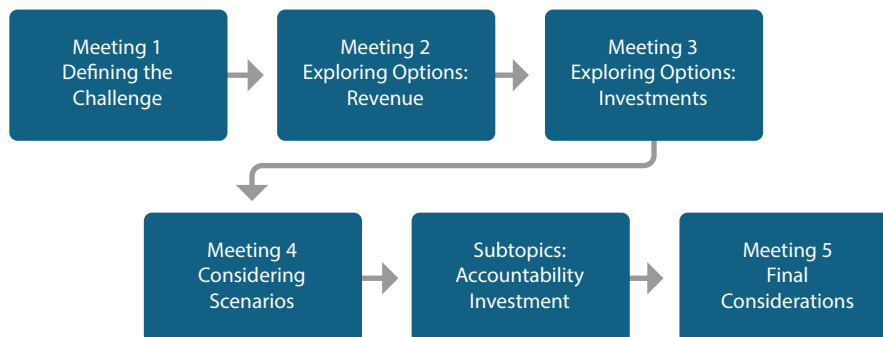
The opportunity for the SAT emerged as Supportive Housing Services (SHS) income tax revenue significantly exceeded the initial annual forecast for the first two years (2021, 2022). Metro's COO sought input from community, government, and business stakeholders about the most effective way to prioritize the investment of these dollars, with the final goal of helping to end homelessness across greater Portland.

The SAT was convened to explore feedback on key questions such as:

- What is the need for continued regional housing funding in the region?
- What revenue source or sources are available, if any?
- If there is an opportunity for affordable housing revenue, who would be served and what investments might help the most?
- What are some opportunities to be innovative?
- How could continued regional housing funding align with other funding and programs that exist?
- How would Metro know it was successful and accountable to our community?

The COO selected and invited advisory table members to represent a range of communities, perspectives, experiences, roles, and geographies across the Portland metro region. The SAT participated in five in-person working sessions held at the Metro Regional Offices; additionally, SAT members were invited to participate in two virtual subject-matter-specific sessions. (Please see appendix for a comprehensive list of advisory table participants.)

SAT Meeting Overview:



Meeting 1: March 1, 2024

Meeting Objective: SAT kickoff and defining the challenge

Meeting Context: This meeting provided SAT participants with background context and information, defined their roles in advising the COO, and defined the core values guiding the work. (Figure 1).

Presentations from Metro staff defined the need for affordable housing, featuring data on population growth in the region, housing pricing and average incomes. Staff also shared a current-state view of the tools available to fund affordable housing, including recent Metro bonds and state funding. Data and analysis gathered for the affordable housing bond, as well as data from IPUMS USA and ECONorthwest, showed that the Metro region is behind in its production of affordable units, particularly impacting affordable units for lower-income households and communities of color.



Key Insights from SAT Participants: SAT participants engaged in small-group discussions about the potential consequences of a gap in regional housing investments.

Common themes that emerged included:

- Real-person harm:**
 - Increasing rates of people facing homelessness, which would be exacerbated if the housing supply gap persists.
 - Continued negative impacts on our unsheltered populations.
 - Lack of stability within families
- Systemic considerations and impacts:**
 - Think systemically about how changes in one area impact other areas: transportation, quality of life, racial equity, capacity building for industries and our governments.
 - It is important to consider not just adding housing inventory but also maintaining and upkeep of the inventory so the region benefits from these investments in the long term.
 - Lack of affordable housing increases the need for rental assistance, and reduces access and choice.
 - Affordable housing is a pathway to home ownership and upward mobility. Gaps in housing investments break this pathway.
 - A potential gap could be a loss of momentum in capacity building and collaboration, with CBOs, MWESBs, and governments.
- Regional impacts:**
 - Regional housing prices are curbing population growth, economic growth, and the reputation of the region.
 - If investment in housing doesn't happen, there will be snowball effects: job stagnation, healthcare issues, traffic and congestion, and impacts on the transit system.
 - As higher housing prices force residents with lower incomes outward, the diversity of our region changes.

Meeting 1 Highlighted Comments:

"A fractured affordable housing system also fractures the social contract in other areas: such as generations coming up who are feeling hopeless."

"The need is great, and dollars are slim."

"We have an ecosystem for culturally specific affordable housing developers and service providers.... We have made good progress there. Instability or lack of funding would put that progress at risk."

Live Graphic Recording - March 1, 2024

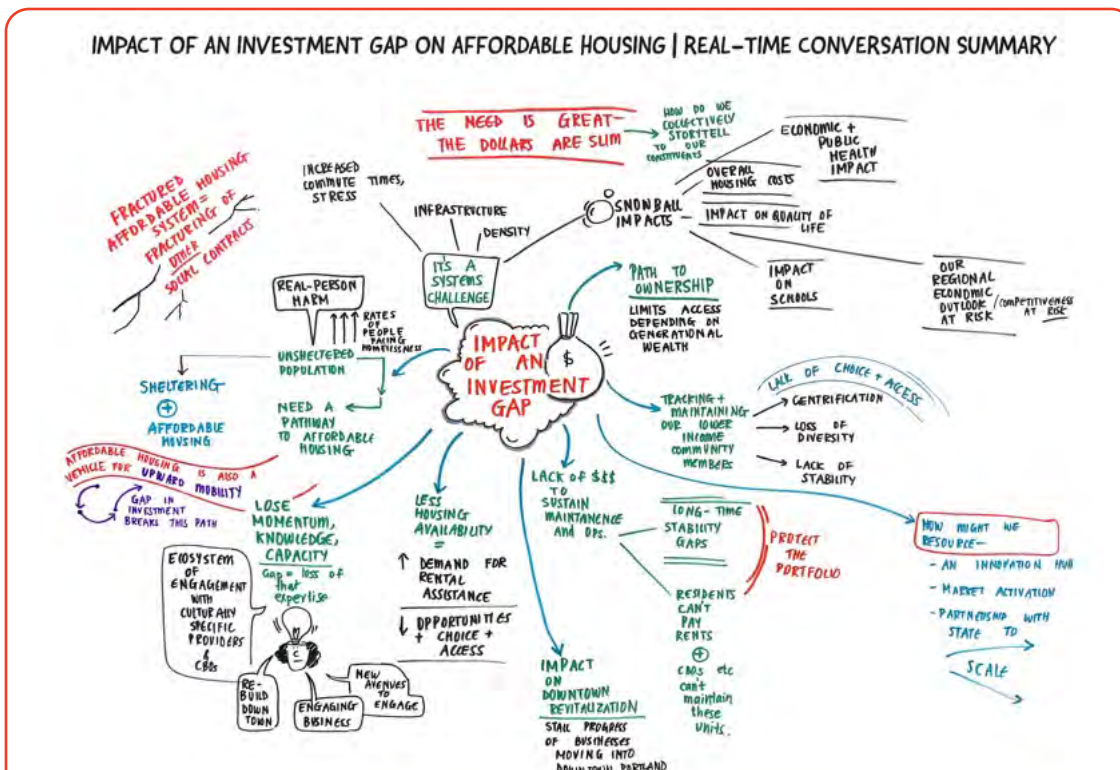


Figure 1: SHS Core Values



Meeting 2: March 20, 2024

Meeting Objective: Exploring revenue options

Meeting Context: In the second SAT meeting, staff presented information about the viability, opportunities and limitations of a variety of potential revenue options to fund additional affordable housing production. This included the Affordable Housing Bond, passed in 2018, and the Supportive Housing Services taxes. Staff presentations summarized allowable expenditures and investments through both revenue sources, as well as the target goals approved by voters.



Key Insights from SAT Participants: SAT members were invited to explore the idea of **using the income taxes to provide both services and housing**. Participants were divided into small groups and asked to represent the voices and needs of their constituents and communities in discussions. Group discussions focused on what should be included in the recommendations to meet these needs and identified any questions or concerns that would need to be addressed. Common themes that emerged included:

- Supportive services are vital resources that stabilize people on their housing journey**
 - Ideally, preserve resources long-term.
 - Confidence is needed that there are adequate resources and flexibility to meet future service needs.
 - Rent assistance, shelter services, eviction prevention and other supportive services are critical to supporting the full housing journey spectrum.
- Considerations for redirecting portions of income taxes for capital investments**
 - There was robust discussion about potential tradeoffs and sacrifices that could be needed if SHS revenue was used to fund both services and housing.
 - The ability to support the production of new units **and** rehab/preserve existing affordable housing is important.
 - Housing priorities: Deeply affordable, family-sized units, mixed-use units with services.
 - Pathways for affordable home ownership are needed.
 - Explore use of funds to purchase buildings and convert into PSH and/or permanently affordable units.
- Increase data, measurement, and accountability**
 - Reduce ambiguity by clearly defining outcomes, goals, timelines and oversight.
- Bake in flexibility into any changes to the income tax**
 - There is a need for flexibility as new data emerges about our region's needs. This flexibility should allow for the use of funds in various ways, such as responsive rent assistance or capital improvements, and should enable adjustments over time based on the resources required.
- Mixed feedback about sunset**
 - Support for restructuring, pushing, or eliminating the sunset of SHS was matched with feedback to keep the sunset as is so that the region can work toward achieving the specific goals spelled out in SHS ballot measure, rather than presume that more time will be needed to achieve those goals.

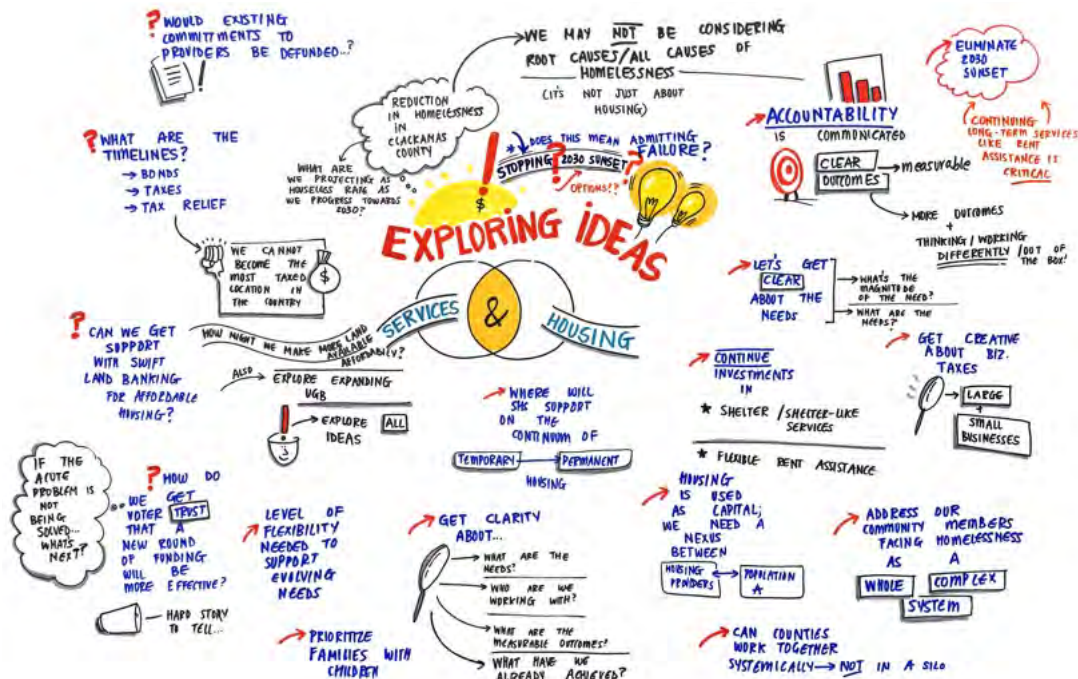
Meeting 2 Highlighted Comments:

"If you assume the houseless rate in 2031 is the same as today, **you've already admitted failure.**"

"How do we establish a clear understanding that we won't be #1 most taxed location? **Tax relief** is hugely important to these conversations."

"We've done a great job getting people in housing assistance vouchers. We'll see **houselessness** increase due to people losing those benefits."

Live Graphic Recording - March 20, 2024



Meeting 3: April 3, 2024

Meeting Objective: Exploring investment options

Meeting Context: In this meeting, participants were invited to build their own revenue scenarios using a series of variables provided by Metro.



Key Insights from SAT Participants: Through the scenario-building exercise, participants shared their views on the tradeoffs and priorities in funding additional housing as they considered who would be served, who would pay, how much, and for how long. Common themes that emerged included:

- **General support for expanding SHS to include housing – making adjustments to reflect lessons learned and the current landscape**
 - “If we lose the pipeline for affordable housing we don’t have another bond on the horizon.”
 - Tax relief for small businesses and on income tax to account for inflation, and for small margins which impact small businesses most.
- **Strong alignment that Populations A and B should be centered for supports**
 - 30% AMI is priority: Maintaining focus on extremely low and low incomes, not in a way that’s exclusive, but ensuring they remain high priority.
- **General support for extending or eliminating the 2030 tax sunset**
 - “If we eliminate sunset, we pre-suppose that when we get to 2030 the need is fixed, which is unrealistic.”
 - This is a sector that’s been underfunded and disinvested for decades. The housing crisis is not going to be solved in a decade, hence the need for extension. “We can’t do two decades of work, turn it off, and think the work will continue.”
- **Cities could play a role in distributing funding under an expansion of SHS**
 - Enable cities to receive dollars so they can directly deploy in a more responsive, nimble fashion that counties can do (building on the successes learned from the first Metro housing bond).
 - Create a pool of funds in partnership with cities: land banking, preserve existing affordable housing – to enable more rapid action at city level.
- **Desire for more data around needs and impacts**
 - Desire for more data around the impacts of expanding SHS’s purview: What are the actual numbers to understand tradeoffs if SHS was redirected?

Meeting 3 Highlighted Comments:

“We need this tax money to end homelessness. **We can’t end homelessness without housing**”

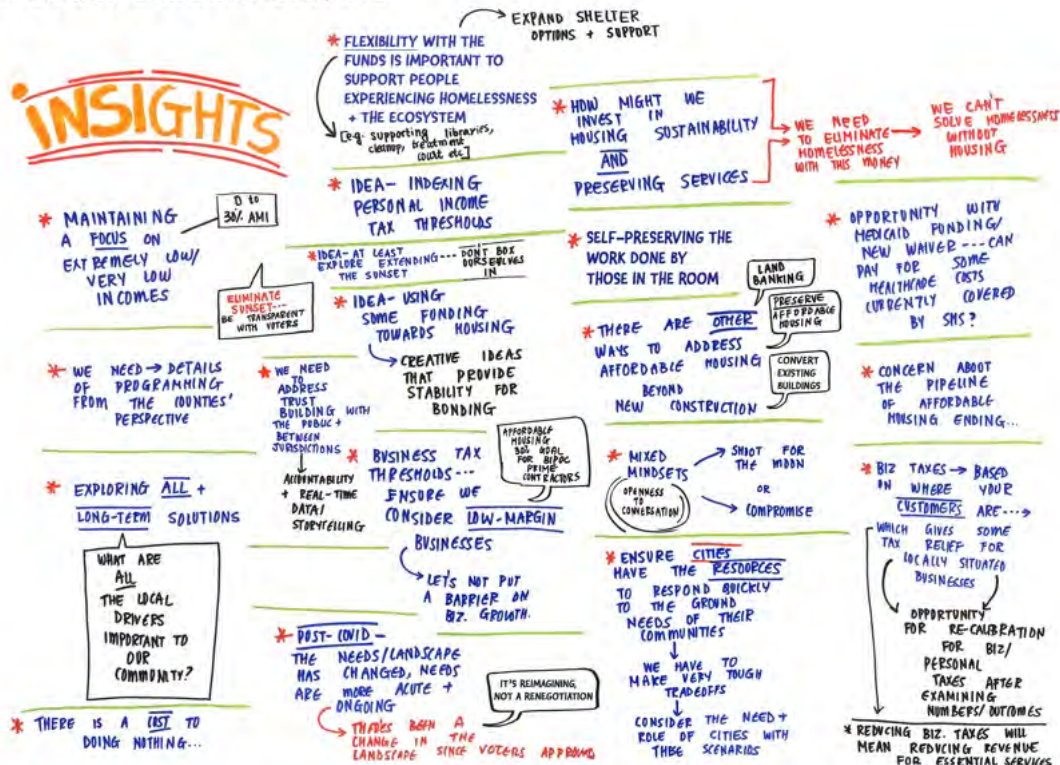
“Since SHS was passed by voters **the landscape has evolved:** From pre-pandemic and where we are now is a whole different world.”

“Flexibility is smarter than being rigid and boxing us in. This is a **re-imagination, not a re-negotiation.**”

“**There is a cost to doing nothing:** the cost when people don’t get [housed]: ER visits, criminal justice. What does that look like? If one tradeoff is doing nothing, there’s a cost to that.”

Live Graphic Recording - April 3, 2024

SCENARIO BUILDING EXERCISE



Meeting 4: April 17, 2024

Meeting Objective: Exploring investment options

Meeting Context: The fourth SAT meeting began with presentations from representatives of each of the three counties in the region. These county presentations outlined current plans for usage of the SHS dollars.

Following the county presentations, Metro continued the revenue scenario building discussion from meeting 3. Following Metro staff's analysis of the individual scenario inputs, common themes that staff identified were organized into three "trending scenarios" that Metro presented to participants (see Figure 2). While these trending scenarios were not recommendations from Metro, they provided a framework to continue the group discussions around potential changes to SHS.



Key Insights from SAT Participants: Factoring in the new information presented from counties, the three trending scenarios from Metro, and any new thinking, participants were invited to **revisit their scenario exercise worksheet from Meeting 3, and provide any additional ideas or changes.** Participants could also leave their original scenario unchanged. Common themes that emerged from the meeting included:

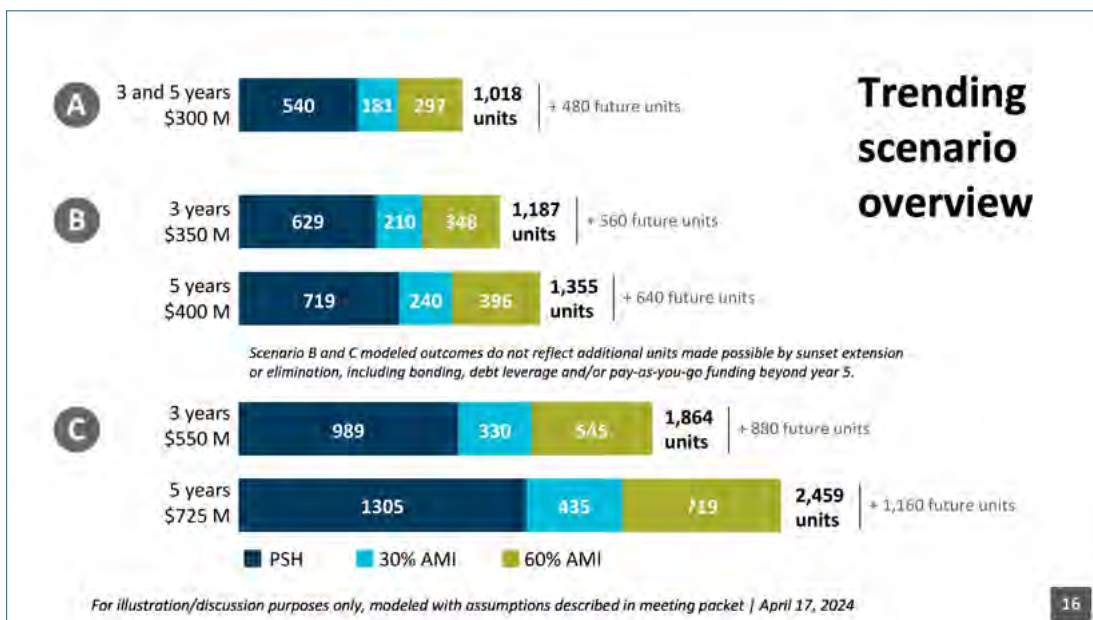
- **Opportunity for collaboration and shared purpose**
 - There is a desire for the region's players to work as partners toward a common goal.
 - Effective collaboration will require clear roles definition for counties and Metro, as well as cities.
- **More clarity desired around tradeoffs if dollars were reallocated**
 - To ensure counties' pre-existing budget commitments are honored, participants requested additional information about specific expenditures counties have already contracted for, and what tradeoffs might exist if dollars were reallocated.
- **Continued commitment to the need for affordable housing**
 - We need a persistent, ongoing need to continue investing in housing, but not at expense of services. This isn't an either/or conversation.
 - "If we stop investing in housing now, we will dig ourselves into a deeper hole."

Meeting 4 Highlighted Comments:

"My plea is that those of us who help to plan **make sure we continue to have policies and practices that support equity.** When we let minority populations be a part of this, we can ensure they get services."

"What I'm nervous about is an energy of 'against each other.' We can do better than that. We need more housing and need it to be affordable. And people need services. **How do we have this conversation where we're working toward that common goal?**"

Figure 2: Three trending scenarios for discussion



Subtopic Meeting: Accountability & Oversight, April 30, 2024

Meeting Objective: Accountability and oversight topic focus

Meeting Context: SAT participants were invited to participate in a virtual topic-specific session about accountability and oversight. Metro staff presented current accountability and oversight structures for Metro's affordable housing bond and SHS measure, and early lessons learned. Metro also shared feedback it has heard from stakeholders of what elements are required to ensure robust accountability, such as integrated systems, demonstrated outcomes, flexibility and adaptability, and transparency.



Key Insights from SAT Participants: In small group breakout discussions, attendees provided feedback about **what was working regarding accountability structures and what obstacles prevented successful accountability**. Specific ideas for accountability and oversight included:

- Changes to oversight structure overall, including Metro's role, the role of existing committees, and the introduction of an independent/outside oversight role.
- Recommendation to gather broader feedback to inform accountability.
- Need for greater transparency overall.
- Changes to the Tri-County Planning Board (TCPB).
- Better and more specificity around the definitions core to SHS.
- More accountability for and acknowledgement of on-the-ground resources and lived experiences.
- Greater coordination of data and systems and the parties involved.

Subtopic Meeting: Investment Evaluation, May 1, 2024

Meeting Objective: Investment topic focus

Meeting Context: The second virtual topic-specific session focused on investment evaluation. Metro staff and its consultants provided an overview about the dynamics associated with investment in affordable units:

- Consultants from BAE presented findings from their analysis around gap financing and gap funding trends, development cost trends, and trends in financing sources. BAE also shared an overview about incentives, tools, policies and actions that could be considered to support affordable housing production.
- Consultants from Lagniappe Housing Solutions presented their study of affordable housing funding needs, based on input from stakeholders such as OHSC, NOAH, Neighborhood Partnership, Proud Ground and Habitat for Humanity. This research identified additional gaps and opportunities for Metro to consider in any investment scenario going forward.
- Consultant Erik Bagwell addressed a variety of options and considerations regarding acquisition and conversion of existing building stock to affordable units, including some of the challenges in doing so.
- Consultant Amy Boyle concluded presentations with background about the needs for preserving existing affordable housing units, to ensure the region doesn't see a decline in its existing supply.



Key Insights from SAT Participants: Following the presentations, SAT participants were invited to provide input via a digital polling tool. Common themes that emerged included:

- Strong support for both home ownership and preservation, but questions emerged about how these could be supported through Metro's work.
- Continued calls for flexibility and nimbleness, echoing previous meeting themes.
- Importance of factoring in capital investments, operating and maintenance expenses into its cost forecasts, so that buildings are ensured a longer life cycle.

Meeting 5: May 10, 2024

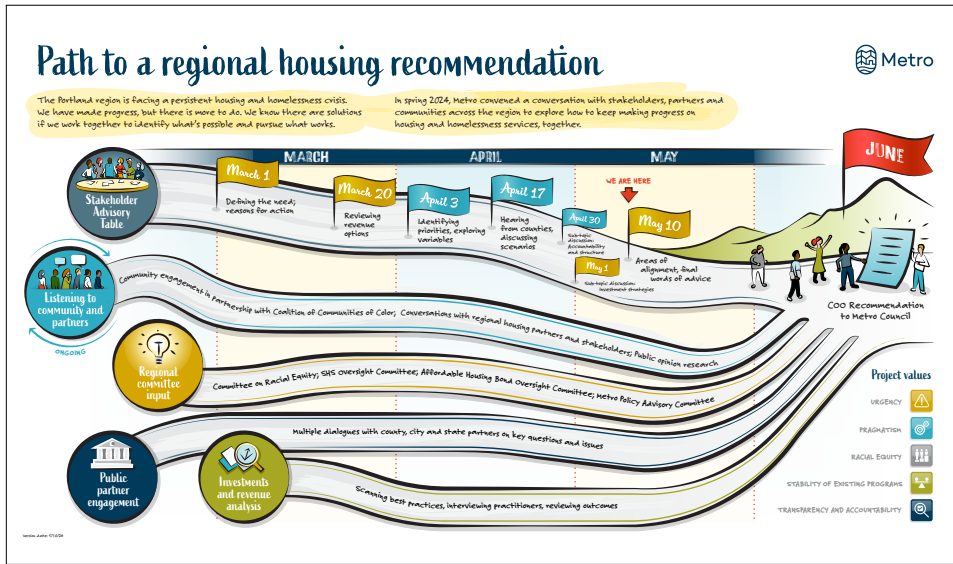
Meeting Objective: Exploring final considerations and next steps

Meeting Context: In the final SAT meeting on May 10, Metro COO Marissa Madrigal synthesized the inputs provided throughout this multi-step process: from the various SAT meetings, conversations with community members and organizations, engagement with county partners, public opinion polling, regional committees for racial equity, policy, and the SHS taxes and housing bond oversight committees (see Figure 3).

Madrigal then outlined the remaining work to be done to arrive at a recommendation to Metro Council, such as funding mechanisms, investment strategies and accountability and oversight.

Key Insights from SAT Participants: Participants were invited to provide final thoughts around what else Metro should consider in developing its recommendation, what values would be important to carry forward in future work, and what each member would carry with them as this SAT process concludes. Common themes were captured in the following visual during the meeting.

Figure 3: The multi-layered path to a regional housing recommendation



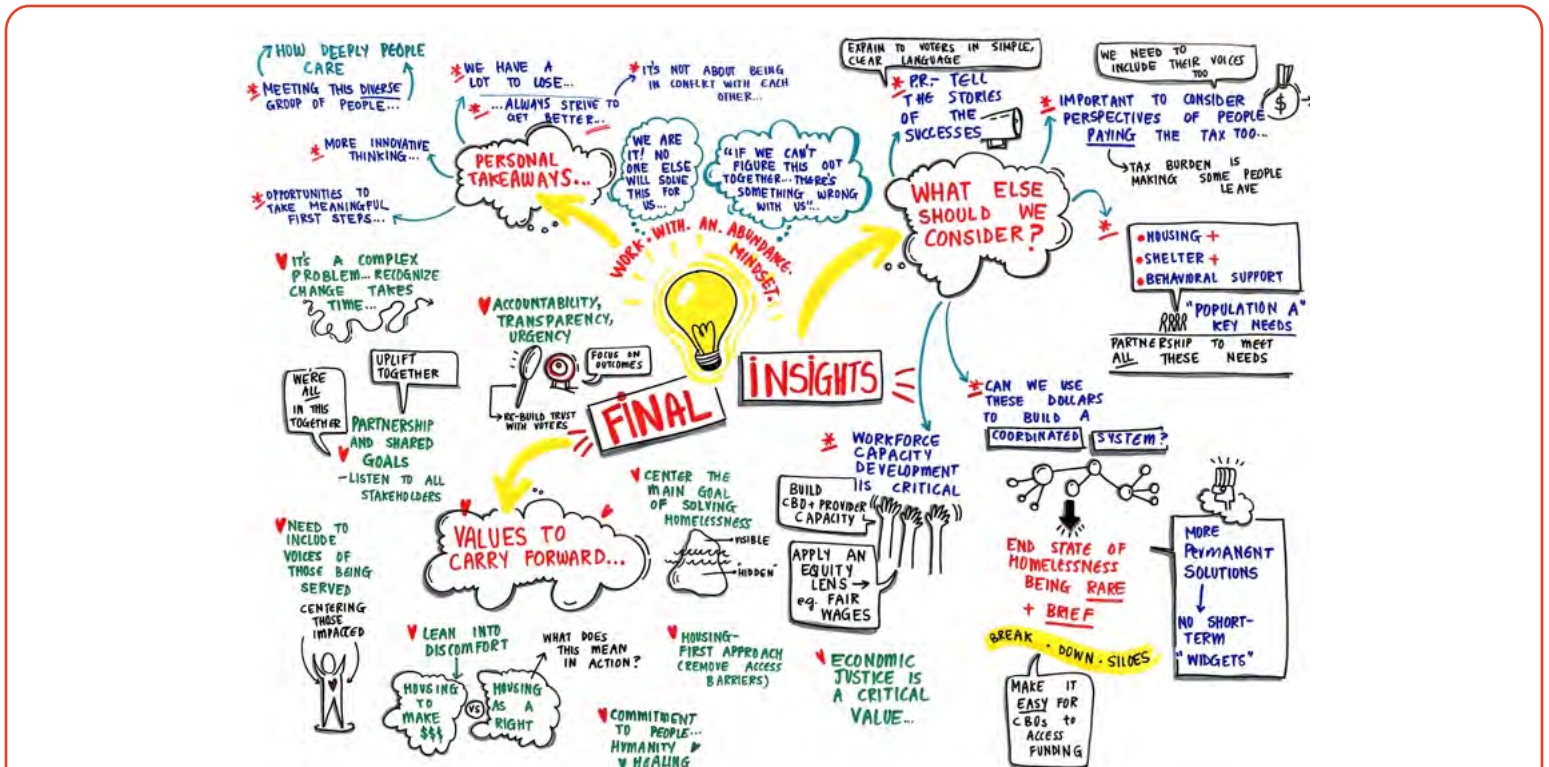
Meeting 5 Highlighted Comments:

"Homelessness is not about widgets. **This is the opportunity: to rethink how to approach it.** Be bold and do that."

"We are it: the solution. **No one from outside will solve our needs.** We have to focus, keep building the system and stop cannibalizing each other."

"I've enjoyed every time you get with a different group in this room you realize **how deeply people care about solving this issue from all sides.** People in need are the most important. Everyone's coming from that place."

Live Graphic Recording - May 10, 2024





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Community engagement summary

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Community Engagement Report

Metro Affordable Housing Investments

Prepared by Jenny Lee and Marcus Mundy, Coalition of Communities of Color, July 2024

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Summary and Findings

In spring 2024, the Coalition of Communities of Color (CCC) worked with Metro to conduct community engagement sessions to inform Metro’s future housing investments. CCC partnered with some of their culturally-specific member organizations and partner organizations to conduct 12 focus groups, emphasizing communities most impacted by the housing shortage. Three focus groups with organizational staff were conducted, including CCC and the Welcome Home Coalition’s membership.

Community members continue to be impacted by the region’s affordable housing shortage, resulting in deep social impacts. Participants identified challenges and opportunities to finding and maintaining housing that were common to all focus groups and others specific to individual populations. There was an emphasis that communities are not monoliths and continued, meaningful engagement is needed to ensure that collective and individual needs and desires are met in housing development and placement, as well as supportive services. Residents support investing supportive housing resources in the development and acquisition of affordable housing while also maintaining sufficient services.

Key learnings included:

- Housing affordability remains a pressing issue for families’ well-being, including economic stability, mental health, and quality of life.
- Regulated affordable housing is very difficult to access and the supply is extremely low relative to the need.
- Both services and housing are essential for addressing homelessness and housing opportunities for low- and moderate-income households.
- More affordable housing is a long-term solution with the potential to better meet the needs and desires of households who cannot afford market rent.
- Services should not be reduced, but existing and future revenue beyond what is needed to maintain current service levels is a significant opportunity to invest in affordable housing.
- A wide range of services and assistance are needed to support housing stability for people with low and extremely low incomes.
- Community members have a wide range of ideas for types of housing, design elements, and increasing affordability, including conversion of existing residential and commercial buildings.
- Many housing desires and barriers that were identified in previous years’ engagements remain salient, particularly desires related to the location of new affordable housing,

amenities, and design features, as well as barriers around affordability and challenges maintaining housing stability.

Purpose

The purpose of this project was to:

- Better understand community members' housing desires and challenges, particularly with regard to regulated affordable housing and services.
- Hear community perspectives on potential changes to the supportive housing services measure, including relative prioritization of housing development and services, population focus, and housing strategies.
- Provide information for pathways for future civic engagement on Metro's housing work.

While Metro, other jurisdictions, and community-based organizations have extensively engaged community members on affordable housing, major decisions on future housing and services investments necessitate that we develop an understanding of current community needs and priorities, and also should position community members as stakeholders in government decision making.

Background

CCC is an alliance of 18 culturally-specific organizations. Our membership is concentrated in the Portland metro area, although our staff also conduct research and policy analysis at the state level. The full list of members can be found [here](#).

In addition to CCC's relationships with potential community engagement partners, CCC staff have participated in the implementation of both of Metro's affordable housing bond measures. Many of CCC's organizational members also provide Supportive Housing Services (SHS)-funded services and/or affordable housing. This work builds on CCC's ongoing efforts related to the development and implementation of the 2018 affordable housing bond and 2020 supportive housing services measure, as well as CCC member and partner organizations' partnerships associated with these programs.

Past Themes

In spring 2024, Metro staff summarized past themes from community engagement efforts prior to the 2018 affordable housing bond, as well as the annual reports for 2020 and 2022. Housing desires reported by community members included:

- Locating new affordable housing in places that stabilize people at risk of displacement, stabilize communities, create opportunity, and provide community benefits.
- Addressing issues of housing discrimination and equitable access.

- Advancing racial equity through workforce opportunity and access to housing.
- Creating larger housing units (3+ bedrooms).
- Creating housing for people with very low incomes.
- Providing communal spaces, laundry facilities, and disability access.
- Family-friendly design: safe places for children to play, family units close to play areas, second bathrooms in larger units, washer/dryer hookups near kitchens for easy multitasking, and other building and unit configurations that support the needs of households with children.
- Safety and security: indoor and outdoor lighting, wide-angle peepholes in exterior doors, and security cameras.
- Mitigating and planning around impacts on the surrounding neighborhood such as traffic, parking, and construction noise.

Focus Groups

CCC partnered with 9 organizations to recruit and host focus groups.

- Africa House (IRCO)
- Bienestar
- Division Midway Alliance
- Greater Middle Eastern Center (IRCO)
- Pacific Islander and Asian Family Center (IRCO)
- Slavic and Eastern European Center (IRCO)
- Street Roots
- Welcome Home Coalition
- Urban League of Portland

CCC also convened one session directly focused on Clackamas County residents to ensure geographic representation. CCC drew on its relationships through our research work in Clackamas County to recruit participants. All other organizations led recruitment for their sessions. Welcome Home's participants were primarily recruited from their Voices for Housing Justice program; Bienestar and Urban League recruited community members as well as residents of their affordable housing properties. Sessions were held primarily in April and May, with one in June.

The focus groups lasted 60 to 90 minutes depending on group size, which ranged from 9 to 24 attendees. They were conducted in English, with Bienestar conducting a community focus group in Spanish with 20 participants. Organizational staff and community members assisted with additional interpretation as needed. Focus groups were conducted by CCC staff and partners with experience in housing instability. Welcome Home conducted two focus groups, one in-person and one on Zoom to ensure accessibility for their participants.

Over 150 individuals attended the focus groups drawing from all three counties. Two were held in Washington County and one in Clackamas. Because this engagement focused on communities typically underrepresented in policymaking (communities of color and people with lived experience of housing instability), focus groups were conducted in the partner organizations' community spaces to support the comfort of participants.

124 community participants provided demographic information. Participants were informed that sharing this information was optional and would be conducted anonymously. Among those who chose to share information, 20 identified as Asian, 30 identified as Black (17 African American and nine as Black African), five identified as American Indian and Alaska Native, seven as Middle Eastern/North African, eight as Pacific Islander, 31 identified as white (20 Slavic and 11 Western European or other white), and three selected multiple racial categories. Sixty participants were immigrants or refugees. Because demographic information was optional, these numbers are significantly lower than total focus group participation. Self-reported living situations were four currently experiencing homelessness, 26 living temporarily with others or with family/friends, 15 owning their own home, and 59 renting. We did not include living or formerly living in regulated affordable housing as a demographic question but four focus groups included significant portions of people living in regulated housing.

The focus groups lasted 60 to 90 minutes depending on group size, which ranged from 9 to 24 attendees. They were conducted in English, with Bienestar conducting a community focus group in Spanish with 20 participants. Organizational staff and community members assisted with additional interpretation as needed. Focus groups were conducted by CCC staff and partners with experience in housing instability. Welcome Home recruited from their Voices for Housing Justice cohorts and conducted two focus groups, one in-person and one on Zoom to ensure accessibility for their participants.

CCC intentionally organized the focus groups as community-only spaces to ensure that participants felt comfortable sharing all aspects of their perspectives on housing and Metro.

In addition to the focus groups, three organizationally-focused sessions were conducted: one each by CCC and Welcome Home with their member organizations, and one with Bienestar staff to gain greater insight into Spanish-speaking communities' housing experiences.

The focus group was formatted with the facilitator presenting basic information and guiding a discussion.

Community Focus Group Format and Outline

- Introduction of CCC and background on Metro government
- Purpose of the engagement
- Group introductions
- Overview of Metro's housing work and revenue

- What has been learned from previous community engagement and examples of how it has changed or influenced policy development and implementation
- Values for affordable housing investments identified in Metro's 2018 community engagement
- Group exercise thinking about what would be most important to keep someone stably housed and share out from the group.
- Information on Metro's affordable housing bond and its outcomes
- Information on the Supportive Housing Services measure and what it funds
- Group discussion for feedback on which communities to prioritize in future investments
- Group discussion of whether investments should include affordable housing, even if it meant the tradeoff of reducing the level of services for SHS
- Group exercise to identify priority areas for funding with future investments and discussion
 - Additional prompts for discussion (time permitting) included the tradeoff for the number of people helped, the amount of time it would take to implement solutions, and the permanency of the solution)
- Reflection on desires for future affordable housing investments and share out
- Discussion of reasons why our region does not have affordable housing (time permitting)
- Repeat back of key themes from the facilitator
- Discussion of desires for future community engagement (whether participants were interested in discussing housing further and how they wanted to engage with government)
- Next steps on policy development process and closing

Housing Concerns

Challenges with affordable housing track many of the findings from previous community engagements. Many concerns were shared across these diverse communities while others were more specific to communities' experiences in the region. A lack of sufficient and culturally-responsive services, as well as a lack of awareness

Regional Shortage of Affordable Housing

Housing affordability was universally recognized as a pressing problem for the region. Every focus group discussed how challenging it was to find both market rental units that they could afford and how extremely difficult it was to access regulated affordable housing. There was a widespread perception that the region was not creating enough affordable housing.

Some participants shared their beliefs on challenges to creating more housing, including more affordable housing. These included an inability to build on vacant land, neighborhood opposition to housing development, competition with homebuyers and investors (particularly those from outside of Oregon), and redevelopment of lower-cost housing into units out of reach for people with moderate incomes.

The language “affordable housing” can be ambiguous, with multiple participants noting that rent-regulated housing is not affordable to many people with low and extremely low incomes. It also does not factor in utilities, which can add substantially to renters’ cost burden.

Barriers to Housing Stability

Participants identified a gap between rising costs and income, as wages were not keeping up with rents. The limited availability of jobs and economic opportunity was perceived as a driver of housing instability. Many participants across identities reported challenges accessing existing housing, including lack of or poor credit and rental history, previous contact with the criminal legal system, and discrimination, including on the basis of perceived mental health issues. Newly arrived residents have no rental or credit history in the US, foreclosing many rental opportunities.

Many residents identified significant issues with property management, including maintenance and repairs, quick responsiveness, relationship-building with residents, and onerous enforcement of rules. Some noted high turnover in resident services staff and desired greater stability.

Impacts of Housing Instability

The consequences of the region’s shortage of affordable housing include frequently changing schools for children, and serious mental health strain.

The lack of affordable homes also deeply impacts economic opportunity. Residents of affordable housing seeking to develop professionally, increase their earnings, or start their own business are concerned that they will be “penalized” by losing their rent-regulated units as they exceed income requirements. Residents indicated that affordable housing should be for those in greatest need, but a transition period and plan for households with increased earnings would help them prepare to afford market-rate rents. Young people may also forego employment opportunities because their earnings are included in the household income, “trap[ping] people in poverty” where multiple generations are unable to advance economically without putting their homes at risk.

Immigrant and Refugee Communities’ Housing Challenges

Many people, even those connected with community-based organizations, are not aware of these resources or have been unable to access them. Larger units are needed to accommodate families and avoid overcrowding. Even market-rate multifamily rentals do not meet this need. Refugee resettlement funds last only three months and asylum seekers receive no funds.

Particularly for these communities, there are deeply disruptive and challenging living situations for people temporarily living with family or friends. Communities repeatedly shared that they would do whatever possible to ensure someone has a home. However, the instance of

“doubling” up can be severe. This has even resulted in parents being separated from their children to find a workable solution. Occupancy that exceeds the lease agreement also puts tenants at risk of eviction, exacerbating the cycle. The severity of these situations, including the attendant trauma, suggests that specific housing situations are urgently needed for newly arrived community members.

Trauma can also play a role in emergency responses to homelessness: for a refugee, a congregate shelter may be associated with locations such as refugee camps and cause trauma. As a result, congregate shelters felt fundamentally inaccessible to those experiencing PTSD. For location, many desire to live in areas with communities they identify with and access to culturally specific resources; for example, the Middle Eastern focus group had a very clear sense of preferred towns and areas based on the communities present there.

“Homelessness” had an expansive definition for participants to include doubling up. “From a culturally-specific perspective, many people have never had their own homes” even though they are not considered homeless, and they are thus unable to receive resources.

Housing Desires

Participants want the ability to stay long-term in a home and community, but also new housing opportunities that allow for economic opportunity, such as taking a new job, or living in a home with more amenities and space.

One participant shared that “people want to be in a place that best serves them” and indicated geographic flexibility, and that they would be open to living in affordable housing properties throughout the region if they best met their other housing desires.

Design Input

Some suggestions on design and unit type demonstrated an appreciation for diverse types of housing. Community members indicated a wide range of preferences and concepts for housing, particularly dependent on family configurations and different generations.

Design suggestions included more “closed” plans, particularly separation between the kitchen and living areas, and privacy for intergenerational households (e.g., adults’ bedrooms not immediately adjacent to each other). While it’s widely understood that intergenerational living or living with family members is common in many cultures and highly valued, participants also raised issues that they would like to have options (e.g., grandparents having a home of their own) and were particularly concerned that young people were unable to move out of their homes. Communities are not a monolith and while the lack of larger units is causing serious housing instability, desires are diverse and not assumed (e.g., advertising available units should reach all communities).

Some community members expressed that in other countries, more communal spaces are common and helped build community among residents, or even suites with shared living rooms

and kitchens with separate bedrooms. Shared spaces may be even more desirable if they offer additional amenities that residents would not otherwise have in their units. Furthering this theme, some suggested shared housing, particularly for immigrant and refugee communities with extended family and social relationships, or single individuals, particularly younger and older adults. Other participants mentioned their strong preference for individual units with bathrooms and kitchens. Community members desire choices in where they live and culturally-appropriate strategies.

Unit Features

Some feedback directly referenced climate change, both reducing the environmental impact of housing as well as resilience to climate change. Common desires included air conditioning and ventilation in the face of rising temperatures, adequate space, sustainable features such as renewable energy sources, durable construction, and greenspaces that would help cool units.

Units need to be physically accessible, with a preference for ground floor units available to those with reduced mobility.

Soundproofing would improve residents' quality of life, particularly for those who work night shifts, and improve relationships among neighbors. Households with young children could be prioritized for ground floor units to reduce noise.

Units should be designed to a quality comparable with market units; one group noted that this was a matter of equity and their community ought to have the same quality of housing as others.

Types of Housing

Participants expressed a very wide range of preferences and/or openness, as well as distaste, for different types of housing.

Two-floor rowhouses were perceived as a balance between density and privacy. While homeownership was raised in the context of unaffordability, participants broadly did not express opposition to multifamily housing or density so long as units were high quality, had adequate space, had desired amenities, and community was built among neighbors. Others expressed that some households may not need much space and that tiny houses and clustered villages could be long-term or temporary housing solutions. By contrast, some felt these spaces could be overcrowded, lack privacy, lead to conflict with neighbors, result in economic segregation, and cause strain for people with disabilities or are neurodivergent. This range of preferences indicates the need for housing abundance, multiple types of housing, choice for potential residents, and creativity in our housing policy.

Location

In addition to access to services, participants indicated flexibility about where they want to live, with less of a focus on specific geography or city but a strong desire for locations that provide

economic opportunities, amenities, and access to transportation. Participants noted that the centralization of services would reduce the strain of accessing services regardless of the area where housing is located. Desired location features included proximity to bus lines, with many residents commuting to work via bus; parks; child care; grocery stores; and health services.

Safety

A number of residents in multifamily homes stated that they would feel most secure if access to the building was limited to residents and accompanied guests through locked buildings and gates. Others suggested a greater presence of staff on site, both property and resident services staff as well as designated security staff, and increased lighting. Some residents feel uncertain about safety in their community and are concerned by inconsistencies in responses to safety issues.

Additional Services and Amenities

Other themes consistent with past engagement included:

- Awareness and increased outreach for affordable housing (e.g., public forums)
- Accessibility for people with physical, psychiatric, or intellectual disabilities
- Access to green spaces and parks, including secure areas for children to play and space for animals
- Adequate on-site bike and vehicle parking
- Community spaces on-site, including spaces where families and community members can spend unstructured time together and children can play, particularly during rainy seasons
- Activities to build community and relationships among residents
- Services
 - Case management and navigation services
 - Childcare on-site
 - Senior services
 - Food pantries

Feedback

We sought specific feedback on two key components of potential housing investments: (1) which populations should be prioritized and (2) how the funds should be spent, both on services as well as affordable housing.

Population Focus

Many people of color experiencing homelessness are missed. Focus groups were structured to focus on housing opportunities, identify issues and desires, and then incorporate discussions about housing investments, including how to spend limited existing resources designed to create housing stability. In particular, communities of color, immigrants, and refugees emphasized that homelessness existed in different ways, and while people may not be living

outside, there was an increasing risk that they would become unsheltered and experience lasting trauma and instability as a result.

CCC also emphasized housing because past public opinion research CCC has commissioned indicates many people make a connection between mental health and substance use disorders and chronic homelessness. By opening up the conversation around housing needs broadly, we aimed to generate feedback that was grounded in community housing needs and then segued to policy discussions.

Spending Resources

Others noted that rent is so high that income levels exclude many people struggling to make ends meet but not eligible for regulated housing. While the acuity of need for people experiencing unsheltered homelessness was apparent, community members often felt that others were seriously struggling and would be at risk of homelessness in the future. Distinctions in types of homelessness—whether doubled up, in emergency shelter, or unsheltered—and causes, including economic hardship, illness, language and cultural barriers, and challenges facing new arrivals require specific, appropriate approaches from service providers.

Participants were concerned about housing across generations, and mentioned older adults who were forced to return to work because they could not afford rent on Social Security income, and young adults who could not establish their own households.

Use of Funds

Uncertainty about the amount of funding and how it would impact services were raised as two of the greatest concerns. Reducing funds to existing programs was of particular concern.

Many participants were aware of lengthy waiting lists for affordable housing and expressed a sense of desperation in their communities.

However, community members were deeply concerned about cuts to existing services and recognized them as essential for housing stability. Enthusiasm for spending on affordable housing was based on the idea that current services would be maintained. While participants recognized there were many necessary services, most felt that funds beyond existing SHS services would be well spent on creating affordable housing. When explicitly asked about the tradeoffs, such as serving fewer people or the length of time to create housing, participants felt that housing was a long-term solution worthy of investment. Participants expressed concerns about “falling further behind” with the number of affordable units and a sense that the situation would not get better without investments.

Participants recognized that public funds are limited and need to be used efficiently and generated ideas on how to reduce costs while creating more affordable housing.

Community Engagement

Focus group participants indicated that they were interested in continued discussion on affordable housing, including policymaking, and engaging directly with government. CCC conducted the focus groups independently without Metro staff presence to create community-centered spaces. In the past, CCC has conducted focus groups in direct partnership with government agencies. We specifically asked if participants were interested in hearing directly from government and sharing their perspectives with them, and virtually all focus groups indicated a strong interest with an emphasis on government coming to community spaces with trusted partners. However, we also received important feedback that the presence of government partners or political leaders can shift discussion toward other pressing issues and concerns that community members are facing and create barriers to discussing specific policy topics.

Presentations and community engagement sessions should be carefully constructed with a trauma-informed approach, clarity for participants on the purpose of engagement, resources available to respond to specific community concerns (e.g., a “cheat sheet” with a directory of community resources), and partnerships with CBOs, including physically hosting events and having staff and community leaders inform the presentation.

Community members had little familiarity with the SHS measure and many were unaware that it was providing rent assistance. They wanted to understand how funds were being spent and questioned whether it was reaching community members since they were unaware of anyone receiving it and did not know how to access it.

Policy Solutions

Prioritization of Resources

Participants consistently believed that creating new regulated affordable housing with public investments was essential to addressing the problem long-term. No opposition to market development was specifically raised, beyond concerns that *only* market-rate housing was being built; however, every focus group reached a clear consensus that housing needs were not being currently met with high market rents, and the risk of rising rents meant regulated affordable housing was a critical solution. Wages will not rise quickly enough to keep up the cost of housing, so permanently affordable housing is seen as a longer-term solution. “Without creating more regulated affordable housing, the situation will only get worse.”

Community members brought up a number of housing solutions in the context of public policy. Participants observed or had heard of vacant units and felt those were a cost-efficient and rapid way to create affordable housing. They also noticed newly-built market housing but did not hear about any significant quantities of new affordable housing creation. When asked directly, participants understood that there are currently limited revenues for housing and services.

Housing Strategies

Down payment assistance was named as a solution to help families transition out of affordable rental housing. Even for those who saved enough for a down payment, families are concerned about long-term stability—all of their savings have been spent on a down payment. And with hefty mortgages, they fear that any emergency or job loss could put them at risk of losing their home. Habitat for Humanity was mentioned as a potential model for increasing homeownership; condos instead of single-family homes were suggested as a more affordable option.

The wide range of desires about housing types discussed above—everything from shared homes to apartment clusters to townhouses and single-family units—demonstrates the need for a diverse and abundant housing supply that offers community members meaningful choices.

Conversion to Regulated Affordable Housing

Acquisition of existing housing was repeatedly identified as a quicker solution to housing, especially among focus groups who discussed the use of the Metro bond in more detail. There was also a perception that this would also reduce costs and that a significant number of vacant units exist.

It should be noted however that multifamily units over three bedrooms exist in very limited numbers, so these may require new development to meet the needs of extremely low income larger families.

One participant raised the concern that public investments in vouchers to private landlords did not provide any lasting benefit beyond housing, and that focusing on affordable housing would have a lasting social impact.

Some participants were very knowledgeable about specific housing strategies for investments, or similar concepts for housing strategies. Community land trusts arose as a way to use public investments that preserved long-term affordability and directly benefited the occupants as they built equity, in contrast to vouchers. Partnerships to acquire government-owned land and incentives for private property owners, such as tax breaks, who may be willing to sell at a reduced rate to create affordable housing were two cost-saving solutions. Adapting unused retail and commercial space for housing could also bring environmental benefits through density and reducing the need to build entirely new buildings. Accessory dwelling units and increased density, including homeowners building on existing residential properties, were also named.

Additional ideas for physically redesigning spaces and increasing housing included reducing parking or moving it underground to increase housing units.

Services and Resources

In addition to on-site services and amenities for affordable housing, participants and organizational staff identified a wide range of additional programs and supports that were needed for long-term success.

Services and resources for low-income community members included:

- Rent assistance, including increased assistance for people with significant health problems and disabilities
- Case management involving a broad array of services
- Help finding and moving into housing, including financial assistance for application fees, deposits, first/last months' rent, and move-in costs
- Culturally appropriate emergency services and shelters for those without any housing, including newly arrived residents, and family shelter options
- Culturally appropriate emergency shelters during extreme weather
- Workforce development to increase income
- Asset-building programs to build wealth and create future housing opportunities
- Eviction prevention programs
- Tenant rights' education, particularly for new arrivals unfamiliar with Oregon's landlord-tenant law (e.g., health and safety violations, repairs, notice for rent increases), offered in multiple languages
- Guidance for residents to understand leases and requirements for the building to prevent lease violations and increase stability in the community
- 24/7 support to stabilize people in crisis or facing conflict

Programs and services, including government, need to be multilingual and mainstream providers need to offer culturally-appropriate/responsive resources. This was emphasized throughout feedback across focus groups.

Participants expressed challenges finding housing assistance, sometimes even if they were connected to service providers, and multiple suggested a registry of units available for rent with information on accessibility of the units. Some participants in regulated affordable housing shared that they had struggled to receive reasonable accommodations and that financial support to housing providers could help make this more possible.

People might be having an episode that is brief, in the moment, because they are on substance in the moment and they should not lose their apartment over it. We need more peer support specialists to support people.

Young adults and individuals without families may qualify for fewer forms of assistance than families with children, making it difficult for them to begin living independently or reach economic stability.

Residents of affordable housing who are seeking to develop professionally, increase their earnings, or start their own business are concerned that they will be "penalized" by losing their rent-regulated units as they exceed income requirements. Residents indicated that affordable housing should be for those in greatest need, but a transition period and plan for households with increased earnings would help them prepare to afford market rate rents.

Additional Housing Policies and Needs

Community members identified additional housing policy responses that fall outside of Metro's housing investments, including rent control, taxes on vacant units to encourage rentals in existing housing inventory, and fees and regulations for new investment properties.

Findings

A review of focus group and organizational discussions are summarized in the following themes:

- Housing affordability remains a pressing issue for families' wellbeing, including economic stability, mental health, and quality of life.
- Regulated affordable housing is very difficult to access and the supply is extremely low relative to the need.
- Both services and housing are essential for addressing homelessness and housing opportunity for low- and moderate-income households.
- More affordable housing is a long-term solution with the potential to better meet the needs and desires of households who cannot afford market rent.
- Services should not be reduced, but existing and future revenue beyond what is needed to maintain current services levels is a significant opportunity to invest in affordable housing.
- A wide range of services and assistance are needed to support housing stability for people with low and extremely low incomes.
- Community members have a broad range of ideas for types of housing, design elements, and increasing affordability, including conversion of existing residential and commercial buildings.
- Many housing desires and barriers that were identified in previous years' engagements remain salient, particularly desires related to the location of new affordable housing, amenities, and design features, and barriers around affordability and challenges maintaining housing stability.

Organizational discussions

Both CCC and the Welcome Home Coalition convened their members to discuss Metro's housing investments, identifying community needs as well as policy input. These conversations used a different set of questions directly discussing needs for affordable housing investments and SHS since organizations were familiar with these programs, and many either provided services or housing or directly interacted with services and housing providers.

At the basic level, implementation is key. Organizations consistently felt that there were acute needs across the communities that they serve. Organizations represented a range of policy perspectives, with some feeling that the urgency of housing people currently experiencing homelessness, even if a temporary solution, may be more of a priority than affordable housing due to the amount of time it would take for development. Additionally, resource constraints mean

fewer people will live in permanently affordable homes relative to those who could receive long-term rent assistance.

Key topics raised included:

- Services
 - The need for services funded by SHS, particularly rent assistance, were not being met and client demand exceeds available rent assistance
 - Wraparound and supportive services are essential for housing stability, both in transitioning into housing and retention
 - Recovery services will be ineffective if there is no housing available after completion of services
- Rent Assistance
 - Rent assistance is needed for affordable housing properties since many tenants are not able to afford even the regulated rent
 - Project-based rent assistance vouchers could support development if the timeline were extended
 - People with the highest barriers could not find units on the market, even with rent assistance; their needs would be better met by a mission-driven housing provider
 - Rent assistance for market units benefits the landlord and does not provide lasting affordable housing infrastructure or community benefit; rents will continue to rise and rent assistance vouchers will have to keep increasing versus affordable housing providers with regulated rents
- Housing Development
 - The 2018 bond was very successful in helping providers develop units
 - Capital use of SHS dollars could increase flexibility, and extending SHS now would enable affordable housing development; the current sunset is too short to benefit affordable housing development
 - Reduced local investment would pose a significant barrier to affordable housing development, especially as conditions have changed since the last housing bond (e.g., availability of financing, cost of construction)
 - Preservation of existing affordable housing needs to be a priority (asset management)
 - Counties should invest more money in housing stability (e.g., rent assistance) than emergency shelters
- Policy and Governances
 - Any policy changes require careful consideration and support for proposals is dependent on the program design--these questions are at a conceptual level rather than an analytical one
 - Lack of clarity around whether SHS is meeting its goals
 - Current governing bodies could be streamlined or better supported to increase efficacy

It was also noted that the SHS program was scheduled to end and providers faced a cliff; this challenge is more concerning than how the funds are used. The concept of “surplus” revenue

was not an accurate frame and new sources of revenue would be needed soon to better meet the need. Some participants felt that the current structure did not require a tradeoff and that there was enough money to fund both. Others felt that all of the projected SHS funds were needed to meet the need for rent assistance and supportive services, or that we should increase revenue so that we would be able to fully meet the need for services and also fund housing creation.

The groups also raised political concerns (changing the use of money intended for services; political viability; interest in another funding source in the future). One member expressed concern about changing a voter-approved measure when the intent of the SHS measure—ending chronic homelessness—had not yet been achieved and that many vulnerable individuals were experiencing unsheltered homelessness and that moving them quickly into housing using rent assistance would be the best use of funds.

Ongoing Work

Next Steps

As with all community engagement, it is essential that participants are informed up front about how their perspectives will be used and also updated and informed on how this will be used. CCC also believes community engagement should, whenever possible and appropriate, provide pathways for civic engagement in public processes. This report will be shared with community participants who provided their contact information. We have committed to informing participants about Metro's actions related to housing investments and opportunities for direct engagement, including written and oral comment at public hearings or emails to elected officials. If Metro does refer a measure at some point, CCC will independently update participants on the measure and the ultimate outcome as part of our commitment to community members as valued, full participants in policymaking.

Areas for further exploration include more specific conversations on permanent supportive housing and the communities' understanding of affordable housing as a solution to homelessness. Past public opinion research conducted by CCC in partnership with Topos indicated that community members make the connection, but that when discussing affordable housing, individuals currently living in housing tended to think more about how housing affordability impacted them or friends and family personally. To that end, we suggest the following approach to future community engagement sessions:

- Ground participants in the specific types of housing that serve as a solution to chronic homelessness such as permanent supportive housing,
- Provide education on how homelessness is defined, who is impacted, and causes and solutions to homelessness
- Understanding of existing SHS programs, including the structure of the program, its activities and outcomes, and revenue allocation

Priorities for Future Engagement

Metro must continue deeper community engagement if they consider future investments in affordable housing. Most importantly, Metro must work with more individuals who have lived experience of homelessness or severe housing instability, people receiving or seeking services funded by SHS or similar social services, extremely low-income people living in affordable housing, and people with physical and psychiatric disabilities. Within these categories, Metro and partners should apply a racial equity lens for engagement in partnerships. Metro must support these community members—who will be the most impacted by decisions related to SHS or housing investments—in meaningfully shaping decisions related to SHS or housing investments. To truly bring these community members into policymaking and feedback will take significant time and effort to bring together key partner organizations and support to hear from folks with lived experience. These individuals provide critical insight and need to be robustly represented in stakeholder conversations.

Throughout any public processes, Metro should engage both with partners but also create opportunities for community members to directly hear from decisionmakers at Metro, including council members and staff leadership, and share their perspectives.

Public opinion research summary

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TO Metro

FROM Dave Metz and Miranda Everitt
FM3 Research

RE: Metro Housing Funding Opinion Research Summary

DATE July 24, 2024

Fairbank, Maslin, Maullin, Metz & Associates (FM3) have completed three rounds of opinion research¹ exploring the views of voters in the Metro service area when it comes to extending funding for housing and homelessness – two issues that area voters feel are most serious in Clackamas, Multnomah and Washington counties. Through these rounds of research, we have consistently found that voters look favorably on the opportunity to continue to fund supportive housing services, and to allow flexibility to apply revenue from the tax on high-income households and large businesses to fund the creation, acquisition and preservation of affordable housing as well.

Key findings of the surveys include:

- **Voters are in a negative mood.** Figure 1 shows that majorities of voters in the region have consistently felt that the area is “on the wrong track” – though that view has moderated slightly in the last few months.

Figure 1: View of the Direction of the Region

Response	Nov. 2023	May 2024	June 2024
Right Direction	26%	27%	27%
Wrong Track	64%	63%	58%
Don't Know	9%	11%	15%

- **They have negative views of local and regional government.** Figure 2 on the next page shows that views of city and county governments and Metro are not especially favorable. While Metro and County governments were seen slightly more positively than city governments regionwide in November 2023, the three levels of government are now essentially all receiving the same ratings – which seem to have deteriorated somewhat since the May 2024 primary election.

¹ **Methodology:** From November 25-29, 2023, FM3 completed 800 interviews, yielding a margin of sampling error for the study is +/-3.5% at the 95% confidence level. From May 2-7, 2024, FM3 completed 645 interviews for an overall margin of sampling error of +/-4.0%. From June 18-20 and 27-30, 2024, FM3 completed 806 interviews for a margin of sampling error of +/-3.5%. Margins of error for subsamples will be higher in each case. All surveys were completed by phone (cell and landline) and text-to-web among likely November 2024 voters in the Metro service territory. Due to rounding, not all totals will sum to 100%.

Figure 2: Favorability Ratings for Local and Regional Government

(Total Favorable / Total Unfavorable)

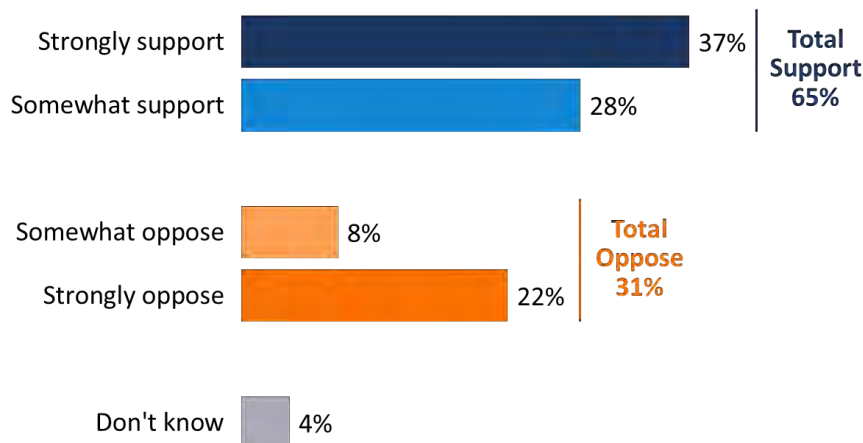
Organization	Nov. 2023	May 2024	June 2024
Your County government	43% / 47%	40% / 49%	35% / 55%
Your City government	36% / 54%	36% / 57%	31% / 62%
Metro	44% / 37%	40% / 37%	31% / 61%

- Homelessness and housing costs remain urgent concerns.** Homelessness remains a near-universally shared concern among the region’s voters, with 91% in the most-recent poll saying it is an “extremely serious” or “very serious” problem for the region – and 79% saying the same for the cost of housing. Doing nothing is not a viable option for most voters: in a November 2023 voter survey, just 30% of voters preferred an option of ending regional investments in affordable housing as the 2018 Metro Housing Bond winds down its spending.
- More than three in five support extending the supportive housing services tax to provide revenue for affordable housing while continuing to provide services for people who are homeless.** Figure 3 below shows the conceptual explanation of the policy change from the November 2023 voter survey. Nearly two-thirds (65%) support the idea, and 37% “strongly support” it. In the May 2024 survey, a similar question yielded support from 62% (and 37% “strong support”).

Figure 3: Support for Extending the Tax and Pairing Housing and Services

Now let me tell you a little bit more about the potential approach to use a portion of this existing tax to build additional affordable housing in the Portland region. Currently, this tax is bringing in additional revenue beyond what is needed to pay for the supportive services it funds. Some people have suggested using this additional revenue to build affordable housing, and also extending the amount of the time that the tax is in place in order beyond a scheduled expiration in 2030 to generate more revenue for housing. This approach would NOT increase tax rates on anyone, but would make it possible to build as many as 5,200 additional units of affordable housing in the region. Knowing this, would you support or oppose this approach?

(November 2023 Survey)



- With the right ballot measure language, support matches the three-in-five backing we have previously seen for the concept.** The June survey tested a range of potential titles and captions to evaluate differences. This poll showed that with a title and caption that makes it clear that the proposal would reauthorize a current funding source without increasing tax rates; strengthen accountability; and provide affordable housing and services for people experiencing homelessness, 62% support a measure – with nearly four in five (38%) saying they would “definitely” vote yes.
- Voters value pairing affordable housing and services.** Voters’ top priorities for funding include maintaining existing affordable rental housing as well as building new affordable rental housing and housing that can be paired with services for people who have experienced long-term homelessness.
- Enhanced oversight is a critical component.** Our research also examined potential accountability provisions. We saw broad interest in improving accountability, with stricter oversight of plans, spending and outcomes supported by 84% of voters. In addition, voters are concerned about the independence of oversight, with 80% supporting an oversight committee made up of experts and stakeholders who do not receive funding from the program.

Figure 4: Support for Potential Measure Accountability Elements

Provision	Total Support	Total Oppose	Don't Know
Increasing oversight of county governments’ plans, spending, and outcomes	84%	11%	5%
Requiring stricter oversight of funding by a committee made up of housing, services and finance experts and stakeholders from across the greater Portland region who do <u>not</u> receive funding from the program	80%	12%	8%

In sum, Metro voters clearly see homelessness and the cost of housing as key issues facing their region – and these issues remain fundamental drivers of their overall negative mood. Given the choice between further regional investment in affordable housing and supportive services, or ending Metro investments, they overwhelmingly choose to continue investing in these priorities. Voters are broadly supportive of extending the tax on high earners and large businesses to fund affordable housing as well as supportive services, especially with the inclusion of strong accountability and oversight structures.

Date: May 2, 2024
To: Marissa Madrigal
Cc: Holly Calhoun, Brian Kennedy, Andy Shaw, Craig Beebe, Elizabeth Goetzinger, Rachael Lembo
From: Jane Marie Ford & Josh Harwood
Subject: Supportive Housing Services Taxes – Tax Policy Considerations

This memo reviews options for tax policy changes to both the SHS Personal Income Tax and Business Income Tax. These scenarios were shared with the Stakeholder Advisory Table:

- Increase the Personal Income Tax exemption thresholds consistent with inflation (standard tax policy)
- Reduce the rate of the Personal Income Tax
- Adjust the Business Income Tax threshold
- Adjust the Business Income Tax rate

Metro staff caution that, due to the nature of the taxes, it will not be possible to accurately forecast the revenue impact of any change. As such, **changes should be considered based on the merit and intent of the tax policy** (e.g., accounting for the impact of inflation on incomes) versus achieving specific revenue goals (e.g., offsetting personal income tax reductions with commensurate increases from the business income tax).

Based on the analysis shared below, Metro staff recommend indexing the Personal Income Tax to inflation. Furthermore, in recognition of the fact that the taxes were implemented for tax year 2021, staff would recommend a one-time resetting of the exemption levels to \$175,000 for single filers and \$250,000 for joint filers for tax year 2025. These exemption levels would then be adjusted further by a measure of inflation each year thereafter. This change would align with standard tax policy practices and help prevent unintended tax bracket creep (i.e., someone making median wage in 2020 would graduate into paying the tax by 2030 based on inflation alone). This option would also reduce the number of people who pay the tax, which would reduce tax collection costs (by reducing the workload for the Tax Administrator, the City of Portland Revenue Division). The main tradeoff is less tax revenue than would otherwise be collected.

[Personal Income Tax policy considerations](#)

The two major mechanisms are to 1) increase the thresholds for income subject to the tax and/or 2) change the rate of the tax applied to that income. The combination of these changes will impact the total number of people who pay the tax, how much they pay, the one-time and ongoing workload of tax administration, and the total revenue collected.

To help illustrate the potential impacts, advantages, and disadvantages of the different tax relief options, this memo uses Tax Year 2021 filing data as of November 2023 as a baseline. This is the most “complete” data available but continues to change with enforcement actions adding new (late) filers. **However, this data may not be representative of the actual impact in any given year** of the tax for several important reasons:

- A substantial number of filers each year experience a one-time or irregular life event that pushes their income above the SHS tax threshold for a single year (e.g., selling a home or business).
- Those with the highest incomes generally have more fluctuation in their annual incomes since less comes from salaries and wages and more comes from capital gains, business income, rents, etc.

Figure 1. Summary figures from Tax Year 2021 Personal Income Tax Collections as of November 2023

	# of Accounts	Amount
Single Filers (taxable income > \$125,000)	19,308	\$ 33,229,276
Joint Filers (taxable income > \$200,000)	45,686	\$ 142,074,472
Total Tax Year 2021 Collections	64,994	\$ 175,303,748

Personal Income Tax Exemption Thresholds:

Currently, the Personal Income Tax applies to Metro taxable income above \$125,000 for single filers and \$200,000 for couples filing jointly. These tax thresholds were established in 2020 with the intent to affect only higher-earning individuals and families. However, the current tax policy does not adjust the thresholds for inflation. This means that more people will be required to pay the tax over time due to inflation rather than an actual increase in purchasing power, and that more income will be subject to the tax.

The table below shows the estimated reduction in both the number of filers and total revenue based on changing the income thresholds to different levels. These estimates are based on Tax Year 2021 data and should be considered illustrative due to the challenges described above. Metro staff's recommended initial exemption level, which was used to model estimates for the SAT, is in green.

Figure 2. Estimated reduction in the number of filers and tax collections based on different exemption levels, based on Tax Year 2021 data.

<i>Estimated Impact Based on Tax Year 2021 Data</i>								
	Joint: \$225,000		Joint: \$250,000		Joint: \$275,000		Joint: \$300,000	
	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions
Single: \$150,000	(11,500)	\$ (14.8)	(16,600)	\$ (23.9)	(20,900)	\$ (31.9)	(24,700)	\$ (38.9)
Single: \$175,000	(15,100)	\$ (17.9)	(20,300)	\$ (27.0)	(24,600)	\$ (35.0)	(28,400)	\$ (42.0)
Single: \$200,000	(17,400)	\$ (20.3)	(22,600)	\$ (29.4)	(26,900)	\$ (37.4)	(30,700)	\$ (44.3)

Personal Income Tax Rate Adjustments:

Currently, the tax applies a 1% rate to Metro taxable income above the established thresholds. The table below shows the impact of reducing the rate to 0.90% and 0.95% under two scenarios:

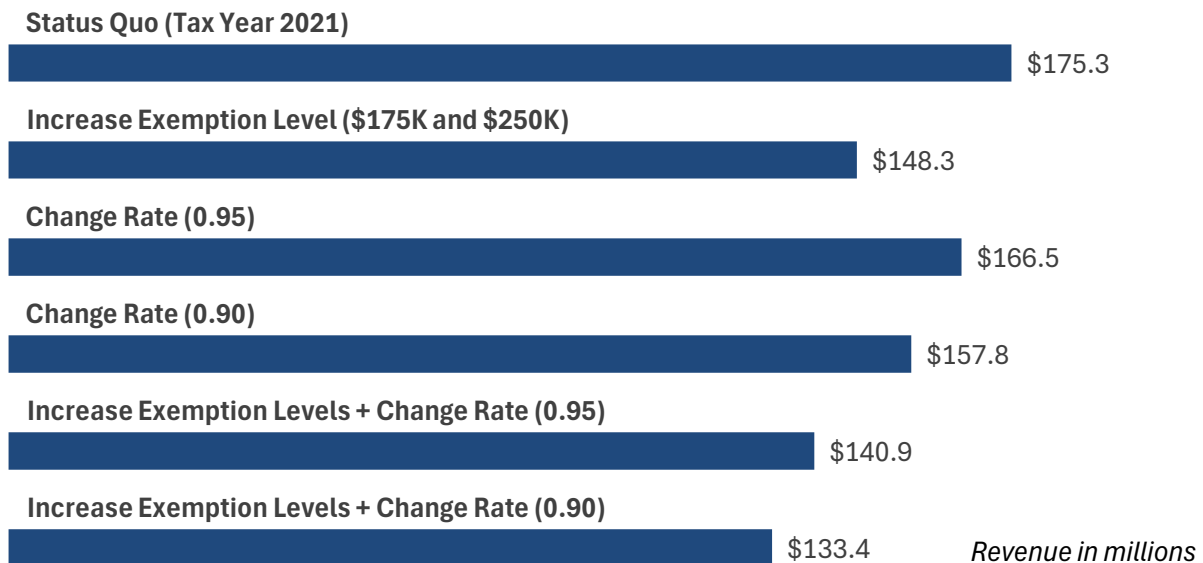
- Using the current exemption levels, which does not impact the total number of people who filed taxes in 2021 but reduced the amount of revenue they would have paid.

- Using the recommended \$175,000 and \$250,000 exemption levels, which reduces the number of people who would have been required to file, the amount of income that would have been subject to the tax, and the rate applied to that income.

Figure 3. Estimated reduction in the number of filers and tax collections at different rate changes and exemption levels, based on Tax Year 2021 data.

<i>Estimated Impact Based on Tax Year 2021 Data</i>			
Exemption Level	Rate	Change in # of filers	Impact in Millions
Current: Single, \$125,000; Joint, \$200,000	0.90 Rate	-	\$ (17.5)
	0.95 Rate	-	\$ (8.8)
Indexed to Inflation Single, \$175,000; Joint, \$250,000	0.90 Rate	(20,300)	\$ (41.9)
	0.95 Rate	(20,300)	\$ (34.4)

Figure 4. Estimated revenue generated under different scenarios, using Tax Year 2021 data.



Business Income Tax policy considerations

The SHS Business Income Tax is a 1% rate on Metro taxable income and applies to businesses that are located or otherwise sell into the Metro region that have at least \$5 million in gross receipts in total. For entities that generate income from multiple locations, the business must apportion their net income based on the percent of sales in the Metro region.

Figure 5. Summary figures from Tax Year 2021 Business Income Tax Collections as of November 2023

Business Income Tax	# of Accounts	Amount
Tax Year 2021 Collections	6,834	\$ 113,692,883

The Stakeholder Advisory Table expressed interest in scenarios that provided relief to businesses, as well as those that shifted the tax burden away from the Personal Income Tax toward the Business Income Tax. **The mechanisms for impacting business taxpayers would either be to change the gross receipts threshold or the rate that applies to the tax.**

As a simple calculation for determining impacts, each 0.1% change in the business rate equals \$10-\$15 million.

It is challenging to model the potential revenue impacts of these changes, and even harder to quantify how this would affect specific payers:

- The legal definition of how a business is formed impacts how the business and/or individual as the business owner interacts with the SHS tax system.
- Businesses self-report gross receipts on their tax return. While we can cross-reference the SHS personal income tax return data with State of Oregon returns, we are not able to verify the business gross receipts figures. As such, we are hesitant to use the business tax return data to estimate which businesses would no longer be required to pay the tax if the gross receipts threshold was increased above \$5 million. Moreover, gross revenue can change significantly each year due to acquisitions, business formations, etc.
- Theoretically, increasing the business income tax rate could help offset revenue loss from increasing the exemption thresholds and/or reducing the rate for the personal income tax. However, while we could model this rate increase based on Tax Year 2021 return data, the actual impact would fluctuate based on the economy.

For context, it is worth noting that the majority of business tax revenue comes from a very small number of accounts. In FY 2022-23, 62% of business tax revenue came from accounts that paid more than \$100,000 in taxes. These accounts were less than 4% of total business taxpayers. As such, increasing the threshold may result in relief for some businesses with nominal impact on total revenue collections. In comparison, increasing the BIT tax rate (or lowering the gross receipts threshold) to “offset” PIT revenue losses does not align with the governor’s moratorium on new taxes and will likely be met with both constituent and business community resistance.

Administrative Considerations

Changes to the taxes will require some administrative workload ranging from minimal programming changes (i.e., changing the rate) to re-engaging Turbo Tax with form changes and a new education campaign to describe the changes (e.g., multiple changes to who is taxed and/or how). Increasing the BIT tax rate would have a nominal impact on administrative or collections costs as the number of businesses filing would not be increased or reduced. Staff would recommend engaging with the City of Portland Revenue Division once details of a proposal have been determined to best understand how changes might impact administrative costs.

Materials following this page were distributed at the meeting.



I-5 Rose Quarter related MTIP Amendments

Metro Council
August 1, 2024



Overview

- Two Federal Funding Awards
- Five MTIP Programming Actions

Public Comment and JPACT Action

- Two Comment Letters Submitted
- JPACT recommends Metro Council Approval

Project Presentations and Council Action

- Project presentations
 - Megan Channell, ODOT
 - J.T. Flowers, Albina Vision Trust
 - Mike Serritella, PBOT
 - Ericka Warren, ODOT
- Metro Council deliberation and action



FEDERAL INVESTMENT IN ALBINA PROJECTS

Neighborhood Access and Equity Grant Awards:

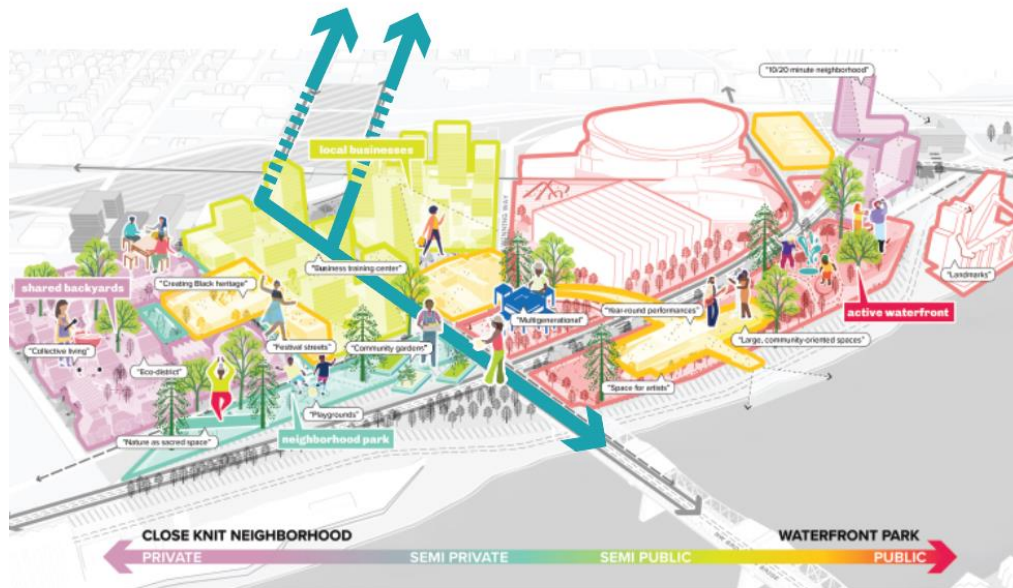
- **\$450 million:** ODOT, I-5 Rose Quarter Improvement Project – *Highway Cover*
- **\$38.4 million:** City, Broadway/Weidler Corridor
- USDOT sees partnerships and community leadership behind projects as **creating a national blueprint for federal funding**
- Selected from more than **600 applications nationwide**
- **Important step to realize vision** of reconnecting neighborhoods, improving transportation networks, and taking part in a collective movement toward restoring the historic Albina community



Irene Marion, Director of USDOT's Departmental Office of Civil Rights, speaking at the April 30 press conference.

Broadway Main Street & Supporting Connections

Neighborhood Access & Equity



Broadway and Weidler are the primary multimodal connections over I-5 connecting Albina Vision identified catalytic sites to neighborhoods and community institutions to the north and east.

Streetscape and safety investments make this busy corridor **a more welcoming street for current and future residents.**

This project compliments and extends the planned investments in the I5RQ cover and local street improvements to better reconnect neighborhoods on either side of the highway.

Broadway Main Street & Supporting Connections

Neighborhood Access & Equity

PROJECT | 18
NE Broadway / Weidler St

Project Highlights

N/NE Broadway and Weidler Streets are a key connection between the east and west sides of the Central City. This segment of the corridor includes some of the highest crash intersections on our bicycle travel lanes where feasible to cross and circulation. The project would connect with existing bike lanes in

Estimated Cost: \$4,980,000

Benefits

PROTECTED BIKEWAY Separating bicycling from other vehicles will improve safety for all roadway users in the high-crash Protected Bike Lanes have been shown to reduce the risk of roadway users by 40%.

Key Considerations

- To accommodate safer crossings and protect
- To accommodate safer crossings and protect
- These safety improvements result in a net

SECTION A
NE Broadway - NE Martin Luther King
350 ave
www.seeding.net



84 | CENTRAL CITY IN MOTION

Transportation for Everyone
CENTRAL CITY IN MOTION IMPLEMENTATION PLAN

PBOT CENTRAL CITY IN MOTION

PROJECTS & STRATEGIES SUPPORTING Albina NEAR-TERM OPPORTUNITIES

The Albina area is ready for a partnership between community organizations and the City of Portland to honor the history of the Albina community and build a better future.

What role can the City of Portland play to realize better goals for this neighborhood area?

Through a combination of corridor projects and strategic plans, the City and community can help move the vision of a vibrant, healthy and successfully growing neighborhood closer to reality. This effort will encompassing regional environmental, cultural and economic activity in the area and is consistent with the Veterans Memorial Convention and Jobs Center.

The City will take the lead work and decisions that have emerged from City and regional processes to address pedestrian, transit, streetscape and safety, included and investment in the corridor. Some of these projects include Central City in Motion, iDowntown, Rose Quarter Transit Center M&A Transit, and the Central City 2035 Plan (see the back cover for more information on these projects).

Project plans will also be informed by the work Albina Vision Trust is leading to develop a community-driven vision for the area. Through a recent planning grant from Metro, the Trust will bring together community partners, the general public, property owners, transit users and the City to create a clear vision for the future and set in motion policies, initiatives and transformative change.

The proposal strongly supports City and regional goals and it is intended to complement and be compatible with other major planned regional investments in the area, including 10 floor Quarter Improvement Project, Central City in Motion and a potential future M&A Transit under the Willamette River.

THE PROPOSAL INCLUDES A SERIES OF STRATEGIC ACTIONS AND STRATEGIC INVESTMENTS TO SUPPORT THE VISION OF BETTER GOALS FOR THE NEIGHBORHOOD.

THIS PACKAGE OF INVESTMENTS INCLUDES:

- 6 PLANS & STRATEGIES** to further the urban design and programming efforts related to Albina Vision goals and consistent with the Central City 2035 Plan. These include concepts for public spaces that encourage social and cultural connections, provide new connections to transit, and/or other made, identify opportunities for more long-term affordable and workforce housing and employment hubs.
- 5 CORRIDOR PROJECTS** to support active, safer, placemaking and community in the central Albina area. These investments build on existing planning efforts and include streetscape enhancements in support of Albina Vision.

Met **PBOT**

BROADWAY MAIN STREET & Supporting Neighborhood Connections

NEIGHBORHOOD ACCESS & EQUITY
Capital Construction Grant Application

PBOT PORTLAND BUREAU OF TRANSPORTATION
ALB VMA



Broadway Main Street & Supporting Connections

Neighborhood Access & Equity



Conceptual Rendering of a Redesigned N Broadway

City of Portland Request:

Amend the 2024-27 MTIP to program the \$38.4 million dollar grant awarded through the Neighborhood Access & Equity program.



Broadway Main Street & Supporting Connections

PROJECT AREA



GRANT FUNDING FOR THE HIGHWAY COVER

- Funds **finishing design and constructing the initial, central part of the project's highway cover** to support community reconnection, new community space, and future development opportunities for the Albina community
- **First federal investment in construction** for this project



Highway cover illustration from Independent Highway Cover Assessment (2021).

- City, Albina Vision Trust, Historic Albina Advisory Board and other project partners worked together to reshape the project to best meet community vision and needs
- Recognized with a 2024 FHWA Environmental Excellence Award



Project partner panel at November 2023 Oregon Transportation Commission.

I-5 ROSE QUARTER IMPROVEMENT PROJECT

HAAB MEMBERS



Sprinavasa Brown
Andrew Campbell
Dr. Carlos Richard
John Washington III
*Dr. Amato-Blackmon**

Bryson Davis
Cleo Davis
Joy Alise Davis
Keith Edwards
*JT Flowers**
Leslie Goodlow
Cleo Lewis
Kevin Modica
James Posey

**Not Pictured*

MTIP AMENDMENT REQUEST

Amend 2024-2027 MTIP to:

Program **\$450M grant award for highway cover:**

- 1) Adds preliminary engineering, right of way, and utility relocation funding needed to complete design of the central portion of the highway cover and ready for the highway cover for construction.
- 2) Adds construction funding to construct the initial, central portion of the highway cover, at Broadway and Weidler.

Program **\$5M for stormwater improvements**
(funding transferred from Region 1 STIP Project)



oregonmetro.gov





Update on Metro's Employee Engagement

High-level updates on the 2023 Employee Engagement survey data, and project next steps

August 1, 2024



Today's Agenda



What is the Employee Engagement Survey?



Survey Highlights and Key Themes



Project Next Steps



Time for Questions?

What is the Employee Engagement Survey?



- Current model launched in 2017 and administered every other year.
- Led by staff from the COO's office, HR, DEI, and Employee Communications.
- Four sections:
 - Gallup Q12
 - Diversity, Equity and Inclusion
 - Reporting Confidence
 - Qualitative Open-Ended Responses



2023 Survey Data Highlights



- 68% survey participation rate, 920 employees' total
- Overall Q12 Employee Engagement Score increased to 3.92!
 - Q12 questions can be divided in four main categories of Basic Needs, Accomplishment, Teamwork and Growth.
 - Growth showed the most significant increase!
- Overall DEI quantitative data stayed the same from 2021 with an agreement mean of 3.77.



Survey Key Organizational Themes



- **Theme 1:** Need for **increased opportunities** for employee interactions and engagement.
- **Theme 2:** The data show unique findings for three key groups: **remote/hybrid employees, onsite employees, and variable hour employees.**
- **Theme 3:** Metro made some **strong gains** in employee engagement, management, and professional development, but there is **room for improvement.**
- **Theme 4:** Quantitative results for DEI remain consistent, but qualitative results indicate a **range of awareness and individual experience.** Needs for continued investment ⁵ in training, coaching, communication, and leadership modeling of DEI as a priority.

Project Approaches and Next Steps



- **Identifying our Organizational Approaches**

- Connecting it back to the four themes recommended by Lexicon & Line in our Employee Engagement Survey.
 - Increased engagement opportunities.
 - Better understanding areas for improvement in professional development and training.
 - Define opportunities to better understand the experiences of our hybrid, VHE, onsite, BIPOC, LGBTQ+ employees

- **Department-Level Milestones**

- Data Analysis and Goal Setting
- Tracking and Reporting
- Build out a Communication Strategy
- Celebration of Accomplishments
- Identify Process Improvements for Next Survey Cycle

Department Goals Highlights



- **Recognition of Accomplishments and Team/Staff Highlights (5 out of 16 depts):** PN, Oregon Zoo, Portland 5, OMA, Housing
- **Connection/Relationship-Building (8 out of 16 depts):** CAM, COO, FRS, OMA, PN, Planning, WPES, Oregon Zoo
- **Expectations/Clarification of Roles (6 out of 16 depts):** COO, Comms, DEI, IS, Housing, Oregon Zoo
- **Pulse Surveys/questionnaires (4 out of 16 depts):** FRS, OCC, Oregon Zoo, PN





Questions?
oregonmetro.gov



Regional Housing Funding: Key Performance Indicators

Overview, purpose and examples

Metro Council Work Session | August 1, 2024



Presentation overview

COO recommendations

Understanding current strengths, challenges
and opportunities to improve

Considerations and examples

Hearing Council questions

COO Recommendation: Key performance metrics

*“...program goals, outcomes, affordable housing targets and data-driven key performance metrics as components of a new Regional Investment Strategy, **to ensure homelessness is as rare, brief and non-recurring across the region as possible.**”*



Metro

Chief Operating Officer Recommendation
Future of regional housing
funding

July 9, 2024
oregonmetro.gov/housing

Key performance metrics: COO Recommendation overview

Part of updated oversight/accountability structure

Core to new Regional Investment Strategy,
specifically addressed in updated local
implementation plans

Objective assessment of progress over time

Key performance metrics: COO Recommendation overview

Clear, specific, quantifiable, regional

Datasets, methods, tools, and reporting

Processes for data analysis and interpretation

Demonstrate effectiveness of funded programs

Status: SHS and Housing Bond

SHS regional plan - under development

Adopted workplans

Individual local implementation plans/strategies

Localized data tracking and reporting

Oversight committees

Regional Planning Body (SHS only)



Key Performance Indicators

Paired with a complete regional plan
and improved oversight

More complete regional picture of
progress and challenges

Support data-driven decision-making

Metro Affordable Housing Bond: Current approach

Program values

- Equity, opportunity for those in need and throughout region, long-term benefits, good use of public dollars

Goals

- Create thousands of affordable homes
- Goals for deeply affordable and family-size unites

Outcome Metrics

- Equitable access to housing
- Equitable contracting and workforce
- Geographic distribution

Outputs

- Number and types of units created

Supportive Housing Services: Current approach

Core values

- Examples: stability; racial equity; proven results; regionalism and local experience

Strategies

- Housing stabilization
- Equitable service delivery
- Engagement and decision-making

Measurable goals

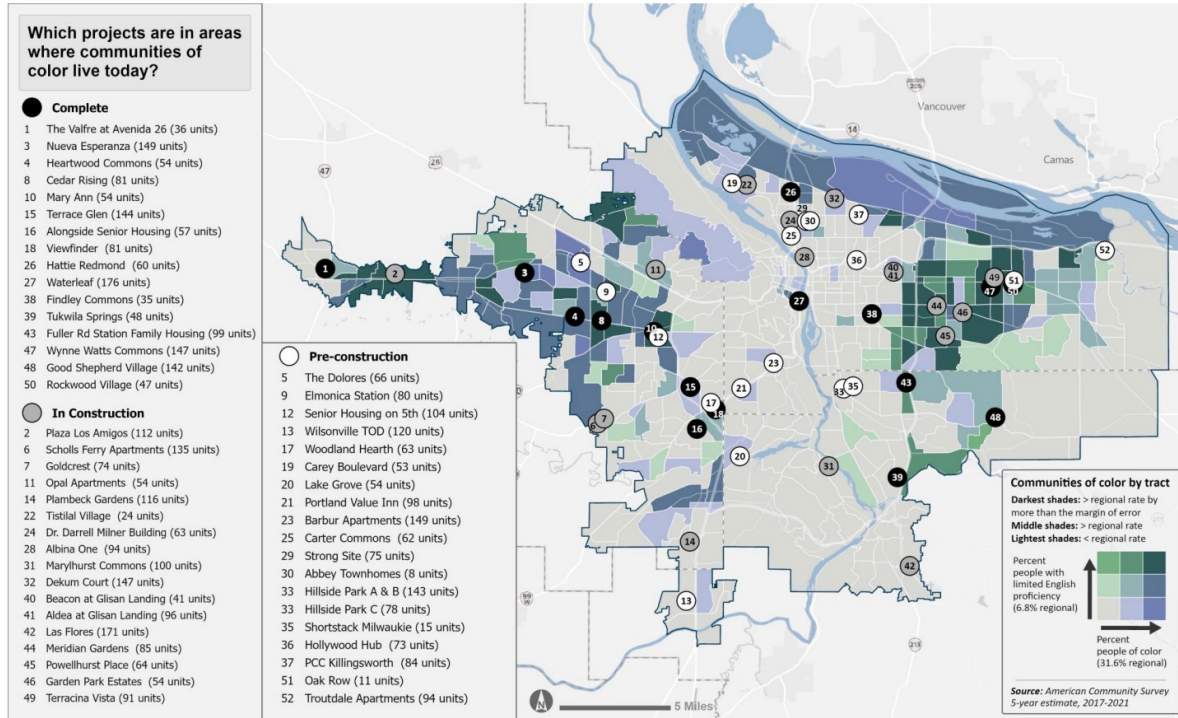
- Specific to each strategy

Outcome metrics

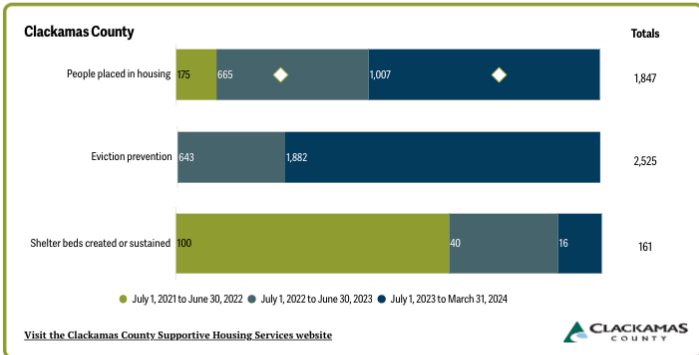
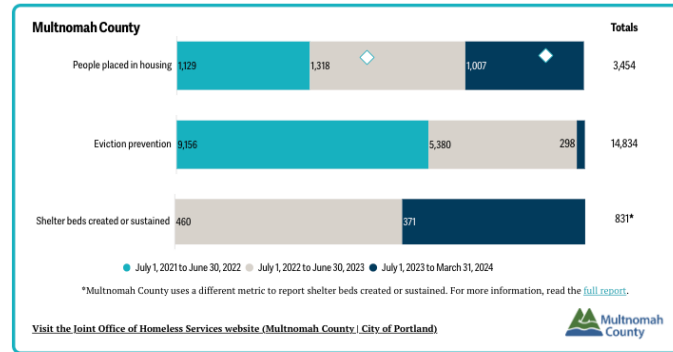
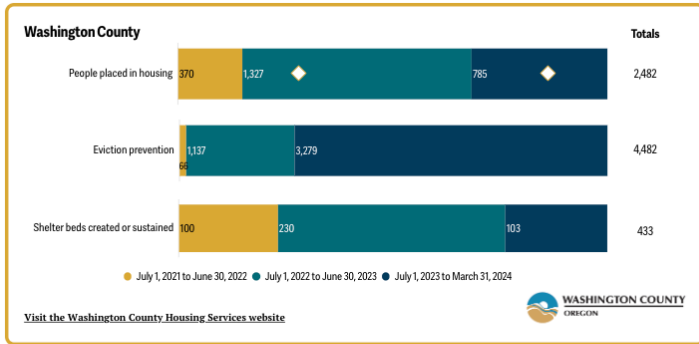
- Specific data to measure progress toward each goal

Data example: Housing Bond

Figure 5.5 Projects located in areas where communities of color live today



Data examples: SHS



Totals (all counties)



Data from July 1, 2021 to March 31, 2024

A need for improvements

Telling a clearer story: *What change can people expect to see?*

Enhancing a regional system of care

Improving data-driven decisions and analysis

Clearer mechanisms to improve

Key Performance Indicators

Build from regional program goals and context

Develop through broad engagement

Focused, measurable, tied to accountability

Align with federal, state and local data

Responsive to major changes

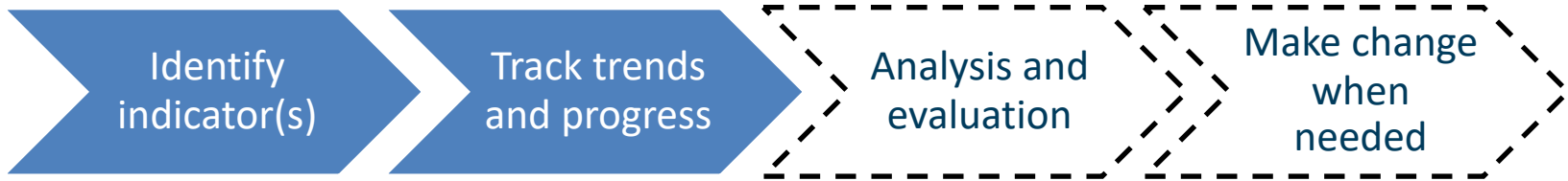
Examples of KPIs in use

Federal: HUD

State: OHCS

Local/Regional: Los Angeles, Houston

KPIs in practice



Discussion

Does Council have questions?

What additional information would Council like staff to provide to inform future direction?



Metro

Supplementary slides

SHS measurable goals and outcome metrics



SHS Strategy: Housing Stabilization

Measurable goals

Equal or better BIPOC access to services

Equal or better BIPOC retention rates

Reducing disparate rate of BIPOC chronic homelessness

Outcome metrics

Total number of supportive housing units created compared to need

Inflow and outflow into housing instability or homelessness

Number of placements and homelessness preventions by type and population

Housing retention rates

Length of homelessness and returns to homelessness

Leveraged funding impact

SHS Strategy: Equitable Service Delivery

Measurable goals

Increase culturally-specific organization capacity

All providers work to build anti-racist, gender-affirming systems

Outcome metrics

Scale of investments through culturally-specific providers

Rates of pay for direct service roles

Distribution of pay from lowest to highest paid staff

Diversity of provider staff: Race, ethnicity, sexual orientation, gender identity, disability status, lived experience

SHS Strategy: Engagement and Decision-Making

Measurable goals

Black, Indigenous and people of color overrepresented on all decision-making and advisory bodies

Black, Indigenous and people of color and people with lived experience of homelessness engaged disproportionately to inform program design and decision-making

Outcome metric

Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness

Supportive Housing Services Personal Income Tax

Tax Policy Scenarios & Considerations

Council Presentation | August 1, 2024



COO Recommendations: SHS Personal Income Tax

- Index tax threshold: Focus on high-earners
- Personal income tax rate reduction, paired with sunset extension
- Consider revenue impacts:
Annual and long-term

Personal Income Tax

Two options for changing who pays and how much:



Increasing the exemption threshold from \$125,000 for single filers and \$200,000 for joint filers means that fewer people pay the tax, and less income is subject to taxes.



Reducing the rate from 1% of income above the threshold means that everyone pays less. Without adjusting the exemption threshold, more people will pay the tax over time.



Changes may be made via ordinance at any time, through a ballot measure, and/or based on the outcome of a ballot measure.

Disclaimers



Analysis is based on Tax Year 2021 data from November 2023, currently the only complete year of data due to withholding report limitations



Due to the volatility of the taxes, revenue projections should be treated as estimates

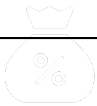


Staff recommend making decisions based on the merit and intent of tax policy, not seeking a specific revenue figure

Exemption Thresholds

Using 2021 data, increasing the thresholds to \$175,000 for single filers and \$250,000 for joint filers would have reduced the number of taxpayers by over 20,000 and revenue by approximately \$27 million

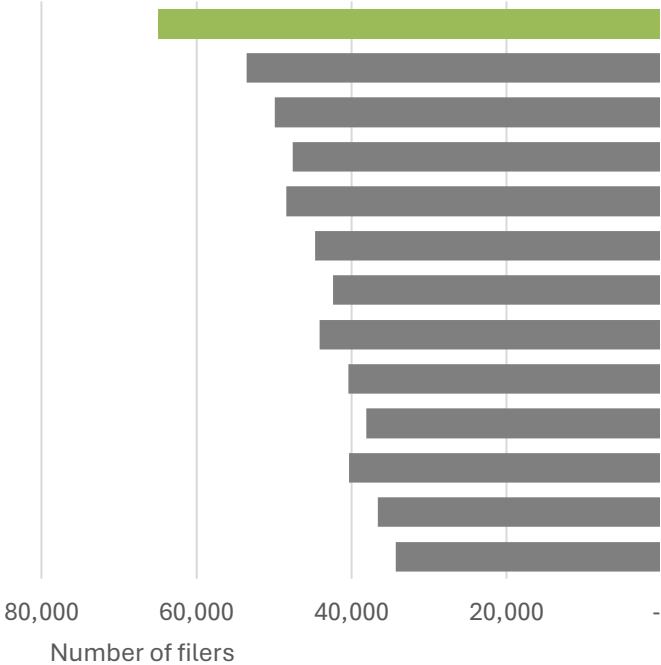
Tax Year 2021 Baseline	# of Accounts	Amount
Single Filers (taxable income > \$125,000)	19,308	\$ 33,229,276
Joint Filers (taxable income > \$200,000)	45,686	\$ 142,074,472
Total Tax Year 2021 Collections	64,994	\$ 175,303,748

<i>Estimated Impact Based on Tax Year 2021 Data</i>								
	Joint: \$225,000		Joint: \$250,000		Joint: \$275,000		Joint: \$300,000	
	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions	Change in # of filers	Impact in Millions
Single: \$150,000	(11,500)	\$ (14.8)	(16,600)	\$ (23.9)	(20,900)	\$ (31.9)	(24,700)	\$ (38.9)
Single: \$175,000	(15,100)	\$ (17.9)	(20,300)	\$ (27.0)	(24,600)	\$ (35.0)	(28,400)	\$ (42.0)
Single: \$200,000	(17,400)	\$ (20.3)	(22,600)	\$ (29.4)	(26,900)	\$ (37.4)	(30,700)	\$ (44.3)

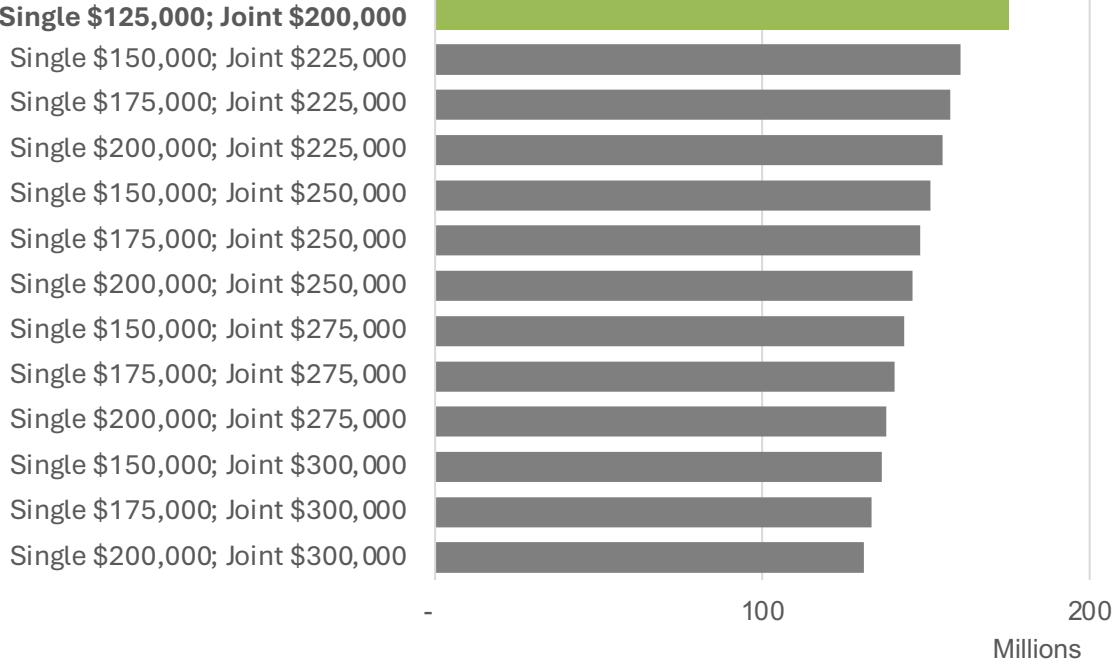
Exemption Thresholds

As the thresholds increase, the number of taxpayers and amount of revenue decrease. These charts illustrate estimates using 2021 data, but the actual impact would vary year to year.

Tax Year 2021 Actual Filers: 64,994



Tax Year 2021 Actual Collections: \$175.3 million



Exemption Threshold Adjustment



Adjust the thresholds for Tax Year 2025, based on 2024 thresholds and inflation.

Threshold	Current	2025 Estimated Level
Single	\$125,000	\$128,750
Joint	\$200,000	\$206,000

Tax Rate

Reducing the rate from the current 1% of income above the threshold is an option for Council.

Tax Year 2021 Baseline	# of Accounts	Amount
Single Filers (taxable income > \$125,000)	19,308	\$ 33,229,276
Joint Filers (taxable income > \$200,000)	45,686	\$ 142,074,472
Total Tax Year 2021 Collections	64,994	\$ 175,303,748



<i>Estimated Impact Based on Tax Year 2021 Data</i>			
Exemption Level	Rate	Change in # of filers	Impact in Millions
Current: Single, \$125,000; Joint, \$200,000	0.90 Rate	-	\$ (17.5)
	0.95 Rate	-	\$ (8.8)

Other Considerations



Tax policy changes will impact administrative cost and complexity. Depending on the changes, this may range from minimal programming changes to requiring form updates, a new educational campaign, & engaging with the tax administrator to assess administrative costs and implementation considerations



Council has noted interest in progressive tax policy scenarios, such as stepping up the tax rate for income above certain thresholds



Staff recommendation: Update thresholds based on 2024 for Tax Year 2025 and beyond, consistent with standard tax policy practices.

Questions for Council



What additional information does Council need to make a decision?



What additional scenarios or policy options should staff analyze?



Date: July 10, 2024

To: Metro Council
Joint Policy Advisory Committee on Transportation (JPACT)
Transportation Policy Alternatives Committee (TPAC)

From: Joe Cortright, *City Observatory*
Chris Smith, No More Freeways

Subject: **Comments on MTIP FFY 2024 Formal Amendment Bundle for Resolution 24-5424**

“Some highway engineers have a mentality ... that would run an eight-lane freeway through the Taj Mahal. That is our problem.”
– Oregon Governor Tom McCall, 1970

We appreciate the time that Metro staff has provided to help us carefully understand this amendment bundle. We have several important perspectives to share on these MTIP items.

We note the significance of programming the highway covers in a separate construction phase.

As Metro staff has explained to us, the use of a separate phase indicates that the multiple phases have ‘independent utility’. While they may be closely connected each could be constructed without the other. We continue to believe that the optimal outcome for the community would be to cap I-5 at Rose Quarter without widening the freeway, instead seeking less costly methods to address operational issues. We suggest that congestion pricing, coupled with some of the more modest investments (e.g., shoulder widening) suggested in the ARUP reports¹ would be the best outcome.

We join the community in celebrating the Reconnecting Communities grants to both the highway covers at Rose Quarter and to the City of Portland Broadway Main Street project.

¹ International traffic engineering firm ARUP was commissioned to review the Rose Quarter project as part of the Independent Cover Assessment. The result was two appendices that review the design and analyze its constructability. While the design has changed since, the fundamental suggestions to achieve desired goals less expensively are still relevant:
I-5 Rose Quarter Freeway Expansion Project: Appendix E: Technical Design Review Memo, ARUP, December 11, 2020.
https://nomorefreewayspx.com/wp-content/uploads/2024/07/20201211-Appendix-E-Technical-Design-Assessment_Accessible.pdf
I-5 Rose Quarter Freeway Expansion Project: Appendix I: Cost and Constructability. ARUP. July 21, 2021.
https://www.i5rosequarter.org/pdfs/independent_cover_assessment/AppendixI_CostAndConstructability.pdf



However, we do request one modification of the programming of the Reconnecting Communities funds. The current bundle would allocate \$382M to the covers and \$30M to Right of Way. We believe that Right of Way should not be prioritized until funding of the highway widening program is fully secured - constructing covers over a narrower footprint would certainly be more cost effective.

We request that the \$30M ROW allocation be allocated instead to the covers, raising the covers allocation to \$412M.

We observe the divergent levels of support for the covers and widening programs.

The highway covers enjoy widespread community support, including enthusiastic support from our organization. It is also possible that if an INFRA grant is awarded, the covers could be fully funded, with almost 90% of the funding coming from Federal sources.

In contrast, the widening project remains extremely controversial in the community, including multiple lawsuits from ourselves and our co-plaintiff organizational partners. Even if a full INFRA grant award is made, there will still be a significant gap that will need to be covered locally, and this cannot help but impact other priorities in our region. We have already seen the Oregon Transportation Commission defer maintenance on the Fremont Bridge and an important bridge project in North Portland to identify the local match for the INFRA application.² Political leadership to direct ODOT to rightsize the Rose Quarter megaproject will ensure this proposed expansion's spiraling cost overruns don't jeopardize regional efforts to lobby the state legislature in pursuit of new revenue for greater investment in local road maintenance, safer streets and public transit in the transportation package expected in the 2025 legislative session.

We urge regional leaders to carefully track the risks and impacts attendant to the Rose Quarter Freeway Expansion component. We continue to believe the impacts are greater than the benefits, and any temporary benefits will be rapidly erased by induced demand. Our community - and the new portions of the community that will soon span the highway at Albina - deserve better.

² "Desperate for freeway funds, transportation commission mulls all bad options" *BikePortland*. May 10, 2024. <https://bikeportland.org/2024/05/10/desperate-for-freeway-funds-transportation-commission-mulls-more-debt-active-transportation-project-delays-386241>