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Clackamas County
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Wednesday, April 17, 2024
7:30 AM – 9:00 AM

Virtual Meeting: <https://clackamascounty.zoom.us/j/84894666867>

Agenda

7:30 a.m. Welcome & Introductions

7:35 a.m. JPACT ([JPACT Materials](#))

- Regional Flexible Funds Allocation (RFFA) Program Direction
Presenting: Ted Leybold and Grace Cho, Metro
- Urban Planning Work Program (UPWP) Program Approval
Presenting: John Mermin, Metro
- Regional Transportation Priorities
Introducing: Trent Wilson, Clackamas

TPAC Update

- *Presenting: Karen Buehrig, Clackamas
Jaimie Lorenzini, Happy Valley*

8:30 a.m. MPAC Update ([MPAC Materials](#))

- *Reporting: MPAC Members*

Attachments:

JPACT and MPAC Work Programs	Page 02
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TPAC Memo	Page 33

2024 JPACT Work Program

As of 2/5/24

Items in italics are tentative

<p><u>January 18, 2024 (online)</u></p> <ul style="list-style-type: none"> • Resolution No. 24-5380 For the Purpose of Adding or Amending Eight Projects to the MTIP to Meet Federal Delivery Requirements (consent) • JPACT DC Trip Update (JPACT Chair Update) • Climate Pollution Reduction Grant: Preliminary Climate Action Plan (Eliot Rose, Metro; 30 min) • Regional Freight Delay and Commodities Movement Study Update (Tim Collins, Metro; 30 min) • Regional Transportation Priorities and Funding (Anneliese Koehler, Metro; 30 min) 	<p><u>February 15, 2024 (in person)</u></p> <ul style="list-style-type: none"> • Resolution No. 24-5384 For the Purpose of Adding or Amending Seven Projects in the 2024-27 MTIP to Meet Federal Transportation Project Delivery Requirements (consent) • Regional Flexible Fund & Metropolitan Transportation Improvement Program (MTIP) Program Direction(s) (Grace Cho, Metro, Ted Leybold, Metro; 40 min) • RTP Next Steps: Chapter 8 Implementation Work Plan and RMPP MTIP Process (Catherine Ciarlo, Metro, Ted Leybold, Metro; 30 min) • Regional Transportation Functional Plan compliance report (Comments from the JPACT Chair)
<p><u>March 21, 2024 (online)</u></p> <ul style="list-style-type: none"> • JPACT DC Trip Update (JPACT Chair Update) • Regional Transportation Priorities and Funding (Anneliese Koehler, Metro; 30 min) • <i>Westside Multimodal Improvements Study (Kate Hawkins, Metro; 30 min)</i> • 2027-30 MTIP Revenue Forecast (Comments from JPACT Chair) 	<p><u>April 18, 2024 (in person)</u></p> <ul style="list-style-type: none"> • Unified Planning Work Program (UPWP) (John Mermin, Metro; 20 min) • Emergency Transportation Routes, Phase 2 (John Mermin, Metro; 30 min) • <i>Regional Flexible Fund – Program Outcomes Overview & Retrospective (Grace Cho, Metro, Ted Leybold, Metro; 40 min)</i> • <i>TriMet Safety and Security Presentation (Sam Desue (he/him, Tara O'Brien (she/her); 30 min)</i> • Regional Transportation Priorities and Funding (Catherine Ciarlo, Metro, Andy Shaw, Metro; 30 min)
<p><u>May 16, 2024 (online)</u></p> <ul style="list-style-type: none"> • Unified Planning Work Program (UPWP) (John Mermin, Metro; 20 min) (action) • Regional Flexible Fund & Metropolitan Transportation Improvement Program (MTIP) Program Direction(s) – Adoption (Grace Cho, Metro, Ted Leybold, Metro; 20 min) (action) • Regional Transportation Priorities and Funding (Catherine Ciarlo, Metro, Andy Shaw, Metro; 30 min) 	<p><u>June 20, 2024 (in person)</u></p> <ul style="list-style-type: none"> • Annual Transit Budget Updates (Chair Update) • <i>HOLD for additional RFFA item if necessary</i> • 82nd Avenue Update
<p><u>July 18, 2024 (online)</u></p>	<p><u>August 15, 2024</u></p>

<ul style="list-style-type: none"> • Connecting First and Last Mile (Ally Holmqvist, Metro; 30 min) • Regional TDM Strategy Kickoff (Noel Mickelberry, Metro, Grace Stainback; 30 min) • TV Highway Implementation Strategy (Jess Zdeb, Metro; 30 min) • Cascadia Corridor Ultra-High-Speed Rail (Ally Holmqvist, Metro; 30 min) • Regional Transportation Priorities and Funding 	
<p><u>September 19, 2024</u></p> <ul style="list-style-type: none"> • RTAC Toll Revenue/PTS & Nexus Projects (Alex Oreschak, Metro, Ally Holmqvist, Metro; 30 min) • Boone Bridge Update (Ally Holmqvist, Metro; 30 min) • Regional Transportation Priorities and Funding 	<p><u>October 17, 2024</u></p> <ul style="list-style-type: none"> • Regional Transportation Priorities and Funding
<p><u>November 21, 2024</u></p> <ul style="list-style-type: none"> • Regional Transportation Priorities and Funding • Safe Streets for All Update (Lake McTighe (she/they), Metro; 30 min) 	<p><u>December 19, 2024</u></p> <ul style="list-style-type: none"> • Connecting First and Last Mile (Ally Holmqvist, Metro; 30 min)

2024 MPAC Work Program

As of 2/8/24

Items in italics are tentative

<p>January 24, 2024 (online only)</p> <ul style="list-style-type: none"> • MPAC Nominations and Review of MPAC Charge (Chair Pam Treece, Malu Wilkinson, Metro; 10 min) • Carbon Pollution Reduction Grant (Eliot Rose (he/him), Metro; 30 min) • Urban Growth Management Functional Plan Annual Compliance Report (Glen Hamburg (he/him), Metro; 15 minutes) • Urban Growth Management Expert Panel (Ted Reid (he/him), Metro, Josh Harwood, Metro, Peter Hulseman, City of Portland, Mark McMullen, State of Oregon, Jeff Renfro, Multnomah County; 80 min) 	<p>February 28, 2024 (in-person)</p> <ul style="list-style-type: none"> • Metro Technical Advisory Committee (MTAC) Nominations for Member/Alternate Member Positions (consent) • Waste Prevention and Environmental Services: Garbage and Recycling System Facilities Plan Update (Estee Segal (she/her), Metro; 30 min) • UGM: regional projection of population and job growth (Ted Reid, he/him, Metro; ECO NW consultants; 45 min)
<p>March 27, 2024 (online only)</p> <ul style="list-style-type: none"> • Legislative Update (Jenna Jones (she/her), Metro) • Housing Update (30 min) • UGM: Preliminary UGB Capacity Estimates needs (Ted Reid, he/him, Metro; 45min) 	<p>April 24, 2024 (in-person)</p> <ul style="list-style-type: none"> • UGM: Regional Housing Needs Analysis (Ted Reid (he/him), Metro; 60 min) • Site Readiness Toolkit (David Tetrick, he/him, Metro; 30 min)
<p>May 22, 2024 (online only)</p> <ul style="list-style-type: none"> • Presentation of city UGB expansion proposals (Eryn Kehe, she/her, Ted Reid, he/him, Metro; city partners TBD; 45 min) • 2040 Planning & Development Grants - program refinements (Serah Breakstone, she/her, Metro; 30 min) 	<p>June 26, 2024 (in-person)</p> <ul style="list-style-type: none"> • Assessment of city employment land UGB expansion proposals (Eryn Kehe, she/her, Ted Reid, he/him, Metro; city partners TBD; 45 min)
<p>July 24, 2024 (online only)</p> <ul style="list-style-type: none"> • 2024 Draft Urban Growth Boundary Report Eryn Kehe, she/her, Ted Reid, he/him, Metro; 45 min) 	<p>August 28, 2024- CANCELLED COO recommendation UGM Decision released and emailed to MPAC members</p>
<p>September 11, 2024 (virtual)</p> <ul style="list-style-type: none"> • <i>UGM COO recommendation review and public comment feedback</i> 	
<p>September 25, 2024 (in person)</p> <ul style="list-style-type: none"> • UGB Expansion Recommendation to Metro Council (action) 	<p>October 23, 2024 (online)</p>

November 13, 2024 (in person)

December 11, 2024 (online)

- Follow up on UGM process (Ted Reid, he/him, Metro; 45 min)



Memo

Date: Thursday, April 11, 2024
To: Joint Policy Advisory Committee on Transportation (JPACT) and Interested Parties
From: Grace Cho, Senior Transportation Planner
Ted Leybold, Resource Development Section Manager
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Program Direction Options for Consideration

Purpose

To provide JPACT a summary overview of the options for consideration for the 2028-2030 Regional Flexible Fund Allocation (RFFA) program direction.

Background

The Regional Flexible Funds are one source of the region’s transportation funding, though they represent a small (~5%) percentage of the total funding spent on transportation across the region. Comprised of federal surface transportation funds provided by the federal government, the allocation of the Regional Flexible funds is one of Metro’s requirements as a federally designated metropolitan planning organization (MPO) to carry out the metropolitan planning process.

Every three years, Metro begins a process to allocate the region’s allotment of federal funds. Starting in February 2024, the 2028-2030 RFFA process began, and the anticipated completion is scheduled for summer 2025 in efforts to prepare for incorporation in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP). Historically the region strategically invested Regional Flexible Funds in parts of the transportation system that are critical to advancing the goals and objectives of the Regional Transportation Plan (RTP).

Program Direction

The RFFA Program Direction documents how the regional flexible funds are to be spent to carry out the policy objectives and investment priorities of the adopted RTP. The development of the Program Direction for the 2028-2030 RFFA cycle is the first step in the RFFA process. The development of the Program Direction is guided by the goals and policies set by the Regional Transportation Plan (RTP). The aim of the upcoming 2028-2030 RFFA program direction are to: 1) update and define the allocation cycle objectives; 2) clarify policy directives which reflect newly adopted regional policies or federal requirements; 3) outline or introduce any additional factors for consideration; and 4) update and define the details of the selection process.

Throughout February and March 2024, Metro staff has briefed TPAC, JPACT, and county coordinating committees (by request), on the 2028-2030 Regional Flexible Fund Allocation. As part of the briefings Metro staff provided an overview of the existing Regional Flexible Fund Allocation program direction, estimated amounts available for the 2028-2030 RFFA cycle, and solicited input related to the program direction. Input received for the program direction has varied from process and procedural considerations to the Step 2 competitive capital grant allocation to broader comments about leveraging Regional Flexible Funds to make greater impact towards the Regional Transportation Plan goals and objectives. To date, the input received has been summarized in Attachment 1.

Program Direction Options

Presentations with regional and coordinating committees, briefings with Metro Councilors, and individual conversations with interested parties are the sources of input received to inform the different options for consideration for the 2028-2030 RFFA program direction. The current 2025-2027 RFFA Program Direction will be carried forward, other than as modified by decisions on the following program direction options, unless additional modifications are identified and acted on during the remaining input, recommendation, and adoption process.

The following options are organized by where they would be most applicable in the RFFA program direction. *The different options presented do not reflect a proposal or recommendation.* These options are for the purpose of discussion, gathering input, and understanding which options are preferred by TPAC, JPACT, and Metro Council to shape a recommendation for consideration by late spring. A summary of the different Program Direction options is outlined in Table 1 with a short description of each option in the following sections. Attachment 2 is the TPAC memo which provides a further detailed description and considerations for the options.

Table 1. Summary of Program Direction Options

Option	Description	Option Considerations
Step 1A: New Project Bond	Commit Regional Flexible Funds to bond and advance funds to build regional or corridor scale projects	Interest in considering a new bond proposal as a part of the 2028-30 RFFA process Purpose and principles for development of a new bond proposal – <i>see list of purpose and principles in the text description below</i>
Step 2: Evaluation Criteria for Capital Projects	Updated evaluation criteria to the 2023 Regional Transportation Plan (RTP) goals	New technical evaluation criteria for thriving economy. Modifications to existing technical evaluation criteria. Project design as a new technical evaluation criteria area.
Step 2: Eligibility Requirements & Allocation Process	Modifications to eligibility requirements and allocation process for Step 2 allocation for capital projects	Updated thresholds for minimum project costs for Step 2 applications. Small jurisdiction application assistance and pre-application procedures.

Program Direction Option – Step 1A – New Project Bond

Past decisions on the Regional Flexible Fund Allocation committed future Regional Flexible Fund dollars to project bond repayment in effort to advance financial resources to delivery larger capital projects earlier and capitalize on federal funding opportunities. Primarily used for the building the region's high capacity transit system, project bonds have also been used for project development on active transportation, the Better Bus program, and limited project development for throughway traffic congestion bottleneck projects. For the 2028-2030 timeframe, the region's scheduled bond repayments are a little under \$52 million in total. This is a decrease from the 2025-2027 RFFA timeframe where the total scheduled bond repayments are a little over \$65 million. The net difference between the two RFFA cycles is \$13.5 million newly unencumbered towards project bond repayments.

The increased funding capacity starting in 2028 opens the question ***as to whether the region should consider a new project bond commitment of Regional Flexible Funds to implement regional or corridor scale projects to advance Regional Transportation Plan goals and outcomes.*** Based on the input heard received to date, ***Metro staff seeks JPACT input as to whether the 2028-2030 RFFA program direction should provide direction to develop a new project bond proposal for consideration as a part of the RFFA decision making process by summer of 2025.***

The allocation of the 2028-2030 Regional Flexible Funds must be completed by summer 2025 to transition programming the awarded projects in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP). Therefore, if the region's interest in a new project bond is affirmed, the action taken as part of the adoption of the 2028-2030 Regional Flexible Fund Allocation Program Direction would direct Metro staff to develop one or more proposals of a funding amount and projects supported that address and balance an adopted set of purpose and principles. A draft set of purpose and principles is provided below for consideration and input.

Purpose of a New Project Bond

A new Regional Flexible Fund project bond would serve the following purposes, consistent with previous project bond commitments undertaken with Regional Flexible Funds:

- A method to utilize regional revenues on regional or corridor scale projects.
- Advance the ability to construct projects earlier than would otherwise be possible.
- Leverage significant discretionary federal revenue that will otherwise be allocated to other metropolitan areas.
- Continuing the past practice to use bonded RFFA revenues to advance transportation projects that improve equitable access to jobs and services, reduce climate impacts, and improve safe travel on the transportation system.

Principles for a New Project Bond

Based on input received to date and on good administrative practices, development of a new bond proposal should address and balance the following principles:

- The allocation of bond proceeds is made in consideration of other transportation spending in the region by other agencies and of the Metro allocation of Carbon Reduction Program funds.
- The new project bond size and scale are to be a reasonable balance between the overall objectives of the Regional Flexible Fund, which includes:
 - Contribute toward regional-scale projects of high impact on priority regional outcomes
 - On-going support for programmatic regional transportation investments
 - Support for smaller capital projects that are impactful on regional outcomes
- Attempts to maintain prior funding levels of Existing Step 1 programmatic allocations and Step 2 capital project funding (with the previously established 3% annual growth rate) for forecasted revenues in 2028-2030.
- Keeps a debt payment to forecasted revenue ratio at a level that minimizes the risks of severe reductions to other Step 1 programs and Step 2 capital projects in the case of revenues being less than forecasted in all future years.
- Is a reasonable trade-off between the advantages of funding priority projects earlier than would otherwise be possible with the reduction in purchasing authority for future allocation cycles.
- Is made available for public comment during the 2028-2030 RFFA cycle comment and decision period.

- Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Improvement Grant projects.
- Attempts to contain extension of bond commitment beyond the next four RFFA cycles (through the year 2039) to preserve the ability of future JPACT and Metro Council bodies the ability to direct spending to priority projects and to minimize risk to the agency guaranteeing the bonding of these revenues.

Future payment of RFFA revenues to pay off the bond obligation would receive priority of available RFFA funds and therefore represent a level of risk to potential reductions to remaining Step 1 region-wide programs and planning and to Step 2 funding available for smaller capital projects. To assess this risk, Metro staff evaluated different bonding amounts and their associated payment schedules across a range of potential future revenue forecasts. The evaluation indicated it will be possible to craft a bond proposal that would result in reductions to remaining Step 1 programs and Step 2 capital projects only in the event there is a significant reduction to future federal transportation funding. More specific options for bond proceed amounts, payment schedules and descriptions of their associated risk would be completed as a part of the bond development proposal.

Program Direction Option - Step 2 – Technical Evaluation Criteria Options

With the adoption of the 2023 RTP, the technical evaluation of Regional Flexible Fund Step 2 capital projects applications needs an update to align to the 2023 RTP goal areas. In review of the 2023 RTP goals and the criteria used as part of the 2025-2027 RFFA Step 2 technical evaluation, the following areas are proposed technical evaluation criteria updates include the following:

- Added Thriving Economy as a new goal area and associated evaluation criteria, including access to jobs and personnel and access to industrial areas.
- Added technical evaluation criteria related to climate resiliency to the Climate Action and Resilience goal.
- Refinement to criteria associated with the goals areas for Equitable Transportation.
- Refinement to criteria for Mobility Options goal area to align to the Regional Mobility Policy.
- Added proposed project design as a new technical evaluation criteria.

Program Direction Option - Step 2 – Eligibility Requirements and Process Options

Input focused on Step 2 varied, but primarily focused on a number of process considerations and refinements to the technical evaluation. Incorporating the input received and in considering the strong desire to see the region make progress towards the five RTP goals in the near-term as well as project delivery and administrative considerations for expending federal transportation funds, a handful of eligibility and process options are proposed for the Step 2 process. These include the following options:

- Increase the minimum funding request for project development work from \$500,000 to \$1 million
- Increase the minimum funding request for capital projects from \$3 million to \$4 million
- Reduce the limit on the number of Step 2 applications from 42 to 34
- Projects which received funding for construction in the 2025-2027 RFFA cycle are ineligible for applying for the upcoming cycle.
 - Projects which received project development funding in the 2025-2027 RFFA cycle would remain eligible.
- Provide technical assistance to small jurisdictions for developing applications.
 - The technical assistance is pending approval of funding.
 - Funding is to be identified and requested prior to the end of the fiscal year.

- Institute a pre-application window and notice of intent to apply letter prior to the opening of the Step 2 application window to identify which jurisdictions are applying and if needed, help identify support activities to undertake during the application window.

TPAC Feedback and Input

TPAC received an overview of the options and provided the following feedback regarding these options for development of the 2028-30 RFFA Program Direction at their April 5th meeting. While not comprehensive, some key themes emerged.

- Support using bond to leverage additional funds; principles are good starting point
- General support for criteria updates, some specific follow-ups requested. (e.g. performance measures for the evaluation criteria)
- Protect Step 2 funding amounts from future reductions and account for inflation
- Some concern about reducing the number of eligible applications and increasing the minimum project cost.

Feedback and Input to Inform a Future Staff Recommendation

The options presented for Step 1A (a new bond option) or Step 2 are a starting point for initiating discussions. Input regarding preferences for the different options will get summarized and return to the May TPAC and JPACT meetings for further discussion for action on a recommendation at the June JPACT meeting.

Question for JPACT

- 1) Do JPACT members have any additional input for the development of the 2028-30 RFFA Program Direction?
- 2) What are JPACT members thoughts on a new regional project bond?



Memo

Date: Friday, March 29, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner, Metro
Ted Leybold, Resource Development Manager, Metro
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Program Direction Options for Step 1 and Step 2

Purpose

To provide TPAC an overview of the options for consideration for the 2028-2030 Regional Flexible Fund Allocation (RFFA) program direction.

Background

The Regional Flexible Funds are federal surface transportation funds provided by the federal government to states, metropolitan planning organizations (MPOs), and local governments. Allocation of these federal funds are part of Metro's requirements as a federally designated MPO to carry out the metropolitan planning process.¹ Every three years, Metro undertakes an 18-20 month process to allocate the region's allotment of federal funds – known as the Regional Flexible Funds allocation (RFFA). Projects selected in the RFFA process are to be ready for funding obligation during federal fiscal years 2028-2030 and will be included in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).²

To initiate the process, a program direction is developed each allocation cycle of the Regional Flexible Funds. The program direction documents how the flexible funds are to be spent to carry out the policy objectives and investment priorities of the adopted RTP. The aim of the upcoming 2028-2030 RFFA program direction are to: 1) update and define the allocation cycle objectives; 2) clarify policy directives which reflect newly adopted regional policies or federal requirements; 3) outline or introduce any additional factors for consideration; and 4) update and define the details of the selection process.

Throughout February and March 2024, Metro staff has briefed TPAC, JPACT, and county coordinating committees (by request), on the 2028-2030 Regional Flexible Fund Allocation. As part of the briefings Metro staff provided an overview of the existing Regional Flexible Fund Allocation program direction, estimated amounts available for the 2028-2030 RFFA cycle, and solicited input related to the program direction. Input received for the program direction has varied from process and procedural considerations to the Step 2 competitive capital grant allocation to broader comments about leveraging Regional Flexible Funds to make greater impact towards the Regional Transportation Plan goals and objectives. To date, the input received has been summarized in Attachment 1.

Requests for additional information were made during the initial engagement activities for the development of the 2028-2030 RFFA Program Direction. Specifically, a comparison of allocations from the previous RFFA cycle to proposed allocations to region-wide programs and planning

¹ Additional background on MPO requirements can be found at <https://www.transit.dot.gov/regulations-and-guidance/transportation-planning/metropolitan-planning-organization-mpo>

² Federal fiscal years begin October 1 of the previous year (e.g. FFY 2028 covers 10/1/27 to 9/30/28)

activities and for the history of bond commitments and payment amounts was requested. This information is provided in Attachment 2.

Program Direction Options

Presentations with regional and coordinating committees, briefings with Metro Councilors, and individual conversations with interested parties are the sources of input received to inform the different options for consideration for the 2028-2030 RFFA program direction. The current 2025-27 RFFA Program Direction will be carried forward, other than as modified by decisions on the following program direction options, unless additional modifications are identified and acted on during the remaining input, recommendation, and adoption process.

The following options are organized by where they would be most applicable in the RFFA program direction. *The different options presented do not reflect a proposal or recommendation.* These options are for the purpose of discussion, gathering input, and understanding which options are preferred by TPAC, JPACT, and Metro Council to shape a recommendation by late spring for consideration.

Program Direction Option – Step 1A – New Project Bond

As illustrated through the 2028-2030 RFFA overview briefings, past decisions on the Regional Flexible Fund Allocation committed future Regional Flexible Fund dollars to project bond repayment in effort to advance financial resources to delivery larger capital projects earlier and capitalize on federal funding opportunities. Primarily used for the building the region’s high capacity transit system, project bonds have also been used for project development on active transportation, the Better Bus program, and limited project development for throughway traffic congestion bottleneck projects. For the 2028-2030 timeframe, the region’s scheduled bond repayments are a little under \$52 million in total. This is a decrease from the 2025-2027 RFFA timeframe where the total scheduled bond repayments are a little over \$65 million. The net different between the two RFFA cycles is \$13.5 million unencumbered towards project bond repayments. (See Table 1.)

Table 1. Bond repayment obligations from 2025-2027 vs. 2028-2030 RFFA cycles

RFFA Cycle (3 years)	Total
2025-2027	\$65.28
2028-2030	\$51.78

Regional partners recognized early the increase of discretionary Regional Flexible Funds as a result of the project bond repayment schedule and provided feedback with interest to discuss what happens to those funds and what opportunities are available. Additionally, input received on the 2028-2030 RFFA program direction includes:

- Make a significant progress toward meeting the five Regional Transportation Plan goals.
- Strategically use the Regional Flexible Funds in a manner that positions the region to leverage other funding opportunities.
- Recognize financing earlier delivery of transportation projects is a wise funding strategy when financing costs are expected to be lower than loss of purchasing power to inflation.

Based on interest and input, the increased discretionary funding capacity presented by the project bond repayment decreasing starting in 2028 opens the *option to consider a new bond commitment of Regional Flexible Funds to implement the input and desired direction heard from some members of TPAC, JPACT, and Metro Council for the 2028-2030 RFFA.*

A new Regional Flexible Fund project bond would serve a number of purposes, but the main purposes would be:

- A method to utilize regional revenues on regional scale impact projects.
- Advance the ability to construct projects earlier than would otherwise be possible.
- Leverage significant discretionary federal revenue that will otherwise be allocated to other metropolitan areas.
- Continuing the past practice to use bonded RFFA revenues to advance transportation projects that improve equitable access to jobs and services, reduce climate impacts, and improve safe travel on the transportation system.

To understand the different implications a new project bond would have on the overall 2028-2030 RFFA, Table 2 outlines different bonding scenarios to help illustrate a *potential* project bond for the purposes of discussion.

Table 2. Step 1 A – Bond Option Scenarios

Bond Size (\$)	Bond Proceeds Amount (\$)	Existing 28-30 Funding Payment	New 28-30 Funding Payment	Step 2 Implication – Growth Revenue Forecast	Step 2 Implication – Flat Revenue Forecast	Step 2 Implication – Reduced Revenue Forecast
No bond*	\$0	\$52M	\$0	28-30: \$67.9M 31-33: \$75.2M 34-36: \$117M 37-39: \$142M	28-30: \$57.8M 31-33: \$54.2M 34-36: \$84.5M 37-39: \$97.2M	28-30: \$43.9M 31-33: \$49.5M 34-36: \$89.6M 37-39: \$112M
Limited	\$55M	\$52M	\$10M	28-30: \$58.3M 31-33: \$63.0M 34-36: \$82.9M 37-39: \$122.9M	28-30: \$48.2M 31-33: \$42.1M 34-36: \$50.4M 37-39: \$78.1M	28-30: \$34.3M 31-33: \$37.4M 34-36: \$55.5M 37-39: \$93.7M
Significant	\$105M	\$52M	\$10.6M	28-30: \$57.3M 31-33: \$61.7M 34-36: \$69.0M 37-39: \$57.5M	28-30: \$47.1M 31-33: \$40.7M 34-36: \$36.5M 37-39: \$31.9M	28-30: \$33.2M 31-33: \$36.0M 34-36: \$41.6M 37-39: \$47.5M

*Indicates if no action is taken the discretionary capacity created by the Step 1A project bond repayment schedule would default to the Step 1B region-wide programs and the Step 2 competitive capital projects allocation. The current bond agreement commits bond payment funding through 2034. These new bond scenarios would commit additional funds through 2039 as illustrative examples of what could be proposed. Step 2 allocation in 2025-27 was \$47.44M.

The scenarios presented attempt to convey the general impact of a new project bond on the 2028-2030 RFFA, but also potential future cycles of the Regional Flexible Fund. The exact impact the new project bond repayment would have on the amount available for Step 2 cannot be specifically determined because of the unknown circumstances of federal transportation funding. The upcoming Regional Flexible Fund Allocation cycle is the first beyond the Bipartisan Infrastructure Law (BIL), which increased the formula allocation of federal dollars into the Surface Transportation

Block Grant (STBG) and Congestion Mitigation and Air Quality (CMAQ) formula programs to levels greater than any previous transportation authorization. Knowing that BIL relied on general funds to bridge the gap in the federal Highway Trust Fund to support those funding increases, maintaining BIL levels of transportation funding are in question. The current revenue estimate at approximately \$153 million is based on revenue assumptions projecting from the final year of BIL, but without any annual growth, which is a reasonable estimate between assuming continued growth to existing authorization levels and cuts to existing authorization levels. .

The typical revenue estimation for the Regional Flexible Fund Allocation cycle attempts to balance between conservative and aggressive starting points and growth assumptions for the next transportation authorization. The RFFA revenue forecast is informed by historical trends and data from previous transportation authorizations. BIL significantly changed the historical trend and since the 2028-2030 cycle is the first beyond BIL, it becomes more difficult in predicting a likely level of federal revenues the region will receive. The risk of over allocating funds in Step 2 based on a forecast that is too large and would necessitate revisiting the allocation decision and delay or cancel awarded projects.

Principles for a New Project Bond

Despite these revenue estimate risks, there remains good reason to consider a new project bond. As noted, the purposes of a new project bond would be to advance regional funds to construct projects earlier and make regional-scale impacts on the transportation system. Nonetheless, a new project bond also means binding Regional Flexible Funds with less funding available to support future opportunities.

At this time, projects to receive the proceeds have not been identified. However, in balancing the different considerations and impacts a new project bond would have on the upcoming and future Regional Flexible Fund Allocations, the selection of projects to receive bond proceeds and amounts allocated – if a new project bond is pursued – should be expected to meet the following objectives as responsible fund administration practices and to be responsive to input received to date on the RFFA program direction:

- The allocation is made in consideration of other transportation spending in the region by other agencies and of the Metro allocation of Carbon Reduction Program funds.
- The new project bond size and scale are to be a reasonable balance between the overall objectives of the Regional Flexible Fund, which includes:
 - Contribute toward regional-scale projects of high impact on priority regional outcomes
 - On-going support for programmatic regional transportation investments
 - Support for smaller capital projects that are impactful on regional outcomes
- Attempts to maintain prior funding levels of Existing Step 1 programmatic allocations and Step 2 capital project funding (with the previously established 3% annual growth rate) for forecasted revenues in 2028-30.
- Keeps a debt payment to forecasted revenue ratio at a level that minimizes the risks of severe reductions to other Step 1 programs and Step 2 capital projects in the case of revenues being less than forecasted in all future years.
- Is a reasonable trade-off between the advantages of funding priority projects earlier than would otherwise be possible with the reduction in purchasing authority for future allocation cycles.

- Is made available for public comment during the 2028-2030 RFFA cycle comment and decision period.
- Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Improvement Grant projects.
- Attempts to contain extension of bond commitment beyond the next four RFFA cycles (through the year 2039) to preserve the ability of future JPACT and Metro Council bodies the ability to direct spending to priority projects and to minimize risk to the agency guaranteeing the bonding of these revenues.

Program Direction Option – Step 2 – Technical Evaluation Criteria – RTP Goals & Evaluation Criteria

With the adoption of the 2023 RTP, the technical evaluation of Regional Flexible Fund Step 2 applications will need an update to align to the 2023 RTP goal areas. In review of the 2023 RTP goals and the criteria used as part of the 2025-2027 RFFA Step 2 technical evaluation, the main area in need of updating includes the addition of Thriving Economy as a new goal area and associated evaluation criteria. Feedback received on the criteria for Thriving Economy included suggested performance measures, such as access to jobs and talent as well as reviewing previous evaluation measures looking at economic prosperity. Based on feedback and a review of the 2023 RTP goal description and objectives for Thriving Economy, some initial options are identified in Table 3.

For the other four RTP goal areas, the option is to continue with the existing criteria with minor refinements to better align with the updated RTP descriptions for these goals. Input heard in regard to incorporating resiliency as part of the Step 2 criteria and some initial options for incorporating resiliency are identified in Table 3. Additionally, modifications to the criteria associated with the goals areas for Equitable Transportation and Mobility Option are also presented in efforts to align with updates to the goal areas identified in the 2023 RTP.

Table 3. Options for 2028-2030 RFFA Step 2 Technical Evaluation Criteria
(**Bold** indicates new or revised criteria)

RTP Goal Area*	25-27 RFFA Criteria	28-30 RFFA Criteria – Options
<p>Equitable Transportation – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.</p>	<ul style="list-style-type: none"> • Increased accessibility • Increased access to affordable travel options 	<ul style="list-style-type: none"> • Same as previous cycle • Meets a transportation need identified by the community

<p>Safe System – Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.</p>	<ul style="list-style-type: none"> • Reduced fatal and serious injury crashes for all modes of travel 	<ul style="list-style-type: none"> • Same as previous cycle
<p>Climate Action and Resilience – People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.</p>	<ul style="list-style-type: none"> • Reduced emissions from vehicles • Reduced drive alone trips 	<ul style="list-style-type: none"> • Same as previous cycle • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases stability of existing critical transportation infrastructure
<p>Mobility Options[^] – People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming</p>	<ul style="list-style-type: none"> • Increased reliability • Increased travel efficiency • Increased travel options • Reduced drive alone trips 	<ul style="list-style-type: none"> • Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips[#]
<p>Thriving Economy – Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.</p>	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities

*Reflects updated definitions of 2023 RTP goals.

[^]Updated to align to the Regional Mobility Policy.

[#]Incorporated as part of Increased travel and land use efficiency.

Program Direction Option – Step 2 – Technical Evaluation Criteria – Design as a Stand Alone Evaluation Criteria

One additional option for consideration is to have an element of the technical evaluation specifically focused on the proposed design elements for the projects. Currently, design considerations are primarily embedded within the criteria of certain RTP goal areas. But knowing that the proposed design often implicates advancing multiple outcomes, having design criteria stand alone would provide a cleaner evaluation. The separation from the RTP goal area outcomes evaluation would allow the evaluation to look more closely at features proposed in consideration of the existing built environment context and the future context of the proposed project. This option is in effort to respond to feedback heard regarding challenges in evaluating proposed projects accommodating for future development needs rather than addressing an existing deficiency or gap in the transportation network. Additionally, this would also allow for those project proposals only seeking project development or planning funding to be excluded from evaluation under the design criteria.

Table 4. Sample Criteria for Design

Design Criteria	Sample/Potential Performance Measure
Increases the livability of streets and trails throughout the region	<ul style="list-style-type: none"> • Proposed elements are appropriate to the designated regional street design or regional trail classification • Project design represents the best possible improvement in project area, based on functional and design classification and contextual constraints.
Enhances and reinforces the regional modal classification for the street or roadway (as applicable by mode) to better function for travel by that mode on that facility	<ul style="list-style-type: none"> • Number of design features (consistent with the designated regional street design or trail classification) added by the proposed project
Supports future population and employment growth demands	<ul style="list-style-type: none"> • Consistent with and implements local comprehensive plan designation for growth • Identified as a center in the 2040 growth concept • Urban reserve designation
Increases travel efficiency of the existing transportation network in a context sensitive manner	<ul style="list-style-type: none"> • Identified deficiency in a local transportation system plan or regional modal or topical plan

Program Direction Option – Step 2 – RFFA Cycle Objectives

Input was provided regarding the strong desire to see the region make progress towards the five RTP goals in the near-term. In efforts to foster greater impact towards the five RTP goal areas in the near-term through the Step 2 competitive allocation, encouraging larger project proposals is an option. To do so, for consideration are the following options:

- Increase the minimum funding request for project development work from \$500,000 to \$1 million
- Increase the minimum funding request for capital projects from \$3 million to \$4 million
- Reduce the limit on the number of Step 2 applications from 42 to 34
 - Sub-region application limits would be reduced by 2 in each sub-region

Metro staff also heard from some jurisdictional partners more efforts are needed to ensure the outcome of the Step 2 allocation reaches across the region. In efforts to maintain a regional focus on

the Step 2 allocation while supporting new projects and new opportunities to compete in the Step 2 allocation, for consideration are the following options:

- Projects which received funding for construction in the 2025-2027 RFFA cycle are ineligible for applying for the upcoming cycle.
 - Projects which received project development funding in the 2025-2027 RFFA cycle would remain eligible.
- Provide technical assistance to small jurisdictions for developing applications.
 - The technical assistance is pending approval of funding.
 - Funding is to be identified and requested prior to the end of the fiscal year.
- Institute a pre-application window and notice of intent to apply letter prior to the opening of the Step 2 application window to identify which jurisdictions are applying and if needed, help identify support activities to undertake during the application window.

Feedback and Input to Inform a Future Staff Recommendation

The intention of the presentation on the 2028-2030 RFFA program direction is to present a set of option for consideration, input, and feedback. The options presented for Step 1A or Step 2 thus far are not recommendations or formalized. Rather, they present a starting point for initiating discussions. Input regarding preferences for the different options will get summarized and return to the May TPAC meeting for further discussion in anticipation for developing a Metro staff proposal for TPAC action on a recommendation at the June meeting.

Question for TPAC

- 1) Are there options not reflected for consideration and discussion?
- 2) What feedback does TPAC have regarding the options presented?

Next Steps/Upcoming Activities

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

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

Activity	Date	Where
Discussion of options for RFFA program direction	April 5	TPAC meeting
Project delivery training series – continued	April 10	TPAC workshop
Overview of region-wide programs and regional planning activities funded as part of Step 1B	April 10	TPAC workshop
Summary of input received to date, discussion of refinements and options for consideration for the RFFA program direction	April 18	JPACT
Further discussion of options with refinements for the RFFA program direction	May	TPAC meeting
Summary of input received, discussion of refinements and options for consideration for RFFA program direction	May 7	Metro Council work session
Coordinating committee briefings	On-going	By request
Briefings with interested parties	On-going	By request



Memo

Date: Friday, March 23, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner
Subject: Attachment 1 – Summary of Input Received on the 2028-2030 Regional Flexible Fund Allocation (RFFA) Program Direction

Purpose: To provide a summary overview of the feedback and input received to date regarding the program direction for the 2028-2030 Regional Flexible Fund Allocation. The items summarized here do not necessarily represent a consensus of the persons providing input, however, Metro staff will attempt to be responsive to this input when presenting future materials for consideration in updating the 2028-30 RFFA Program Direction. The feedback received are organized by themes.

RTP goals and priorities

- Assess what new priorities emerged through the 2023 RTP process and identify what potential funding role the Regional Flexible Fund can play for those new priorities.
 - In particular, resiliency is an aspect related to the Climate Action goal areas which should be in consideration for a transportation system investment.
- Provide further information on how the new RTP goal area – Thriving Economy – will integrate into the 2028-2030 RFFA.
- While recognizing the Carbon Reduction Program is a funding program focused on addressing the RTP goals area of Climate Action and Resilience, continue to focus on Climate Action and Resilience in the allocation of Regional Flexible Funds.
- Consider new regional investments for Step 1
 - Gather understanding of community and regional support if considering any new Step 1 investments

Making strategic investments to garner large impacts and outcomes

- Take advantage of the discretionary grant funding opportunities which remain available.
- Assess leverage opportunities and coordination.
 - In particular, understand how the region can make investments coordinated with opportunities presented by the U.S. EPA Carbon Pollution Reduction Grant.

Provide further resources to support better applications in the Step 2 process

- Structure the process in Step 2 to provide greater flexibility and opportunity for competitive applications:
 - Ex. Allowing for joint applications between two jurisdictions
 - Ex. Providing more guidance and resources to support jurisdictions to develop competitive applications
 - Ex. Provide support for smaller jurisdictions with the application process
 - Ex. Provide a funding opportunity for corridor and sub-regional planning focused on coordinating small cities (e.g. East Metro Connections Plan)
 - Ex. Request coordinating committees help filter and prioritize applications for submission
- Ensure Step 2 remains a viable source for local capital projects with impacts on regional outcomes

Continuing to invest in the regional transit system

- Continue to support the development of the region’s high capacity transit network by establishing a pipeline of transit projects ready for the Federal Transit Administration (FTA) Capital Investment Grant (CIG) process.
- Consider investments to do further planning work around Tier II and Tier III corridors in the High Capacity Transit Plan.
- Consider investments into access to transit infrastructure and service-related activities, with considerations for addressing non-traditional transit service gaps and public-private partnerships.
- Consider strategic investments to make transit attractive that will increase ridership.

Provide further clarity as to what amount of the 2028-2030 Regional Flexible Fund is discretionary

- Provide an overview of bond commitment repayments, including amounts and timeframe of committed repayments.
- Provide an overview of the region-wide programs and regionally coordinated planning activities.
 - More specifically, provide a comparison of allocations from previous Regional Flexible Fund cycles for the region-wide programs and planning activities.

Attachment 2
Supplemental RFFA Program Information – Response to Step 1 Questions

Step 1B – Region-wide Programs and Planning Activities Funding Levels

Three region-wide programs and two regional planning activities have been identified through previous RTP cycles which comprise Step 1B. Defined over time by regional policy objectives, regional scope for implementation, necessity in meeting state and federal mandates, and efficiencies in program administration, the region has elected to provide a consistent allocation of regional flexible funds to support these programs and planning activities. Step 1B targets funding towards key system investment needs, ensures the region has capacity to follow federal planning requirements and can respond to and plan for future system opportunities.

Feedback received to date on the Step 1B region-wide programs and planning activities have focused on gathering clarity on the historical allocations from the previous Regional Flexible Fund Allocation cycles for these different programs and understanding the method for developing the allocation to the programs and planning activities for the next cycle. Table 3 provides an outline of the allocation to the Step 1B from the previous cycle and the default allocation for the 28-30 RFFA cycle. The allocation amounts identified operate under the existing program direction the region will at a minimum continue to support the region-wide programs and planning activities at existing service levels.¹

Table 1. Step 1 Region-wide programs and planning activities – allocation amounts by cycle

	25-27 Allocation	28-30 Allocation	Difference
Project bond repayment	\$65,280,000	\$51,780,000	-\$13,500,000
Transit-Oriented Development	\$11,806,111	\$12,900,856	\$1,094,745
Transportation System Management & Operations*	\$6,943,432	\$7,586,487	\$643,055
Regional Travel Options (includes Safe Routes to Schools)	\$11,102,372	\$12,131,862	\$1,029,490
Corridor & Systems Planning (includes freight & economic planning)*	\$5,037,483	\$2,763,321	-\$2,274,162
MPO In-lieu-of-dues	\$4,730,789	\$5,169,460	\$438,671
Application support for federal discretionary grants*	\$500,000	\$0	-\$500,000
Total	\$105,400,187	\$92,331,986	-\$12,568,201

*Indicates the Step 1B activity received a supplemental allocation adopted by the region after the passage of the Bipartisan Infrastructure Law (BIL)

Step 1A - RFFA Bonding and Payment Commitments

Requests were made during initial outreach on the 2028-30 RFFA Program Direction update to better understand the prior bonding of RFFA revenues and the payment commitments to those bonding activities. The following table summarizes the history of bonding of RFFA revenues, the projects that received bond proceeds, and the associated payment commitments.

¹ Existing program direction is to provide region-wide programs and planning activities a 3% per year growth rate in efforts to maintain purchasing power for program/planning activities.

Table 2. RFFA Bonding and Payment Schedule

	Res 96-2442	Res 99-2804A	Res 03-3290	Res 04-3468	Res 08-3942	Res 10-4133	Res 17-4800	Res 17-4848	Total
Year	South/North (Interstate MAX \$41.5 M, South \$24 M)		South Corridor (\$15 M), Commuter Rail (\$10 M), N Macadam Streetcar (\$10 M)	I-205/Mall LRT (\$9.5 M for total of \$48.5 M)	Milwaukie LRT (\$72.5 M), Commuter Rail (\$13.3 M)	Milwaukie LRT (\$27.4 M), Lake Oswego Streetcar (\$6 M), SW Corridor (\$6 M)	SW Corridor (\$60 M), Division Transit (\$25 M), Arterial/Hwy (\$10 M), ATPD (\$2 M), Enhanced Transit (\$5 M)		
1999	\$1.50								\$1.50
2000	\$6.00								\$6.00
2001	\$6.00								\$6.00
2002	\$6.00								\$6.00
2003	\$6.00								\$6.00
2004	\$6.00								\$6.00
2005	\$5.00	\$1.00							\$6.00
2006	\$5.00	\$1.00	\$2.00						\$8.00
2007	\$5.00	\$1.00	\$2.00						\$8.00
2008	\$5.00	\$1.00	\$2.00	\$1.30					\$9.30
2009	\$3.50	\$2.50	\$2.00	\$1.30					\$9.30
2010		\$6.00	\$2.00	\$1.30					\$9.30
2011			\$8.00	\$1.30					\$9.30
2012			\$8.00	\$1.30	\$3.70				\$13.00
2013			\$8.00	\$1.30	\$3.70				\$13.00
2014			\$8.00	\$1.30	\$3.70	\$2.00			\$15.00
2015			\$8.00	\$1.30	\$3.70	\$2.00			\$15.00
2016					\$13.00	\$3.00			\$16.00
2017					\$13.00	\$3.00			\$16.00
2018					\$13.00	\$3.00			\$16.00
2019					\$13.00	\$3.00	\$3.25	\$1.13	\$20.38
2020					\$13.00	\$3.00	\$3.25	\$2.14	\$21.39
2021					\$13.00	\$3.00	\$3.25	\$2.14	\$21.39
2022					\$13.00	\$3.00	\$3.50	\$2.34	\$21.84
2023					\$13.00	\$3.00	\$3.50	\$2.33	\$21.83
2024					\$13.00	\$3.00	\$3.50	\$2.30	\$21.80
2025					\$13.00	\$3.00	\$3.50	\$2.28	\$21.78
2026						\$16.00	\$3.50	\$2.26	\$21.76
2027						\$16.00	\$3.50	\$2.24	\$21.74
2028							\$12.10	\$5.18	\$17.28
2029							\$12.10	\$5.16	\$17.26
2030							\$12.10	\$5.14	\$17.24
2031							\$12.10	\$5.12	\$17.22
2032								\$17.19	\$17.19
2033								\$17.17	\$17.17
2034								\$17.15	\$17.15



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: March 29, 2024
To: Transportation Policy Alternatives Committee (TPAC) and interested parties
From: John Mermin, Senior Transportation Planner
Subject: 2024-25 Draft Unified Planning Work Program (UPWP) - Exhibit A to Resolution 24-5399

Background

What the UPWP Is

The Unified Planning Work Program (UPWP) is developed annually by Metro as the Metropolitan Planning Organization (MPO) for the Portland Metropolitan Area. It is a federally-required document that serves as a guide for transportation planning activities to be conducted over the course of each fiscal year, beginning on July 1. Included in the UPWP are descriptions of the transportation planning activities, the relationships between them, and budget summaries displaying the amount and source of state and federal funds to be used for planning activities. The UPWP is developed by Metro with input from local governments, TriMet, the Oregon Department of Transportation (ODOT), the Federal Highway Administration (FHWA), and the Federal Transit Administration (FTA). It helps ensure efficient use of federal planning funds. The UPWP may be amended periodically as projects change or new projects emerge.

What the UPWP Is not

The UPWP is not a regional policy making document and does not make any funding allocations. Instead, the UPWP reflects decisions already made by JPACT, the Metro Council and/or the state legislature on funding and policy. The UPWP does not include construction, design or preliminary engineering projects. It only includes regionally significant planning projects (primarily those that will be receiving federal funds) for the upcoming fiscal year.

UPWP Adoption process

The legislation to adopt the UPWP (Resolution 24-5499 and Staff Report) is included in this packet. The UPWP document is Exhibit A to the Resolution. Exhibit B are Metro's Self-certification findings that demonstrate that Metro meets federal planning regulations.

The Draft UPWP was sent out to Federal and State reviewers (and TPAC members) on January 26. The required Federal and State consultation was held on February 28 and a discussion with TPAC was held on March 1. At its April 5 meeting, TPAC will be asked to take action on a revised (tracked-changes) UPWP document that includes all edits made since the January draft was sent out for review.

Staff will provide an informational briefing to JPACT on April 18 and then will ask for adoption at the May 23 JPACT and Council meetings. Staff will transmit the adopted UPWP to Federal & State partners on May 24. This allows time for the IGA to be signed by Metro's COO prior to June 30, allowing for federal funding to continue flowing into the region without delay.

Please contact john.mermin@oregonmetro.gov, for inquiries about the UPWP.



Metro

2024-25 Unified Planning Work Program

JPACT, April 18, 2024

John Mermin, Senior Transportation Planner

What is the UPWP

- Annual federally-required document that ensures efficient use of federal planning funds
- Describes:
 - Transportation planning tasks
 - Relationship to other planning activities in the region
 - Budget summaries

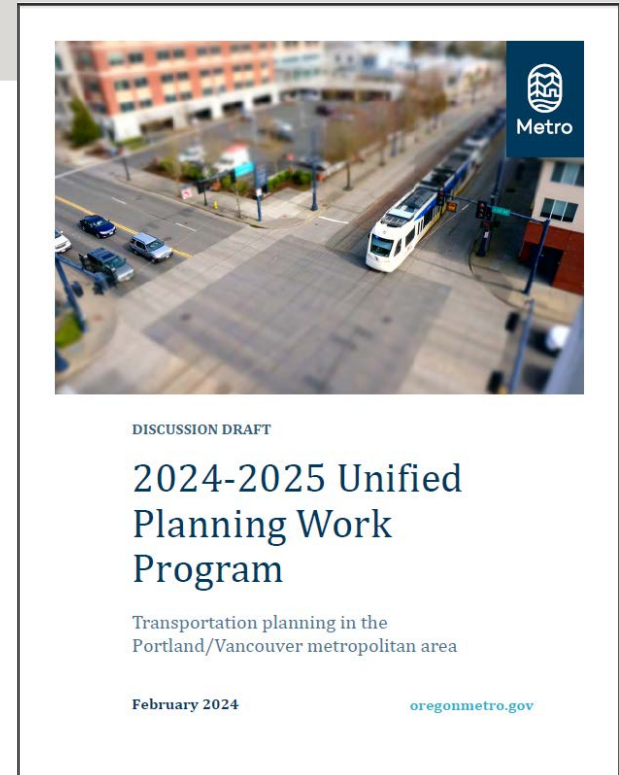
What the UPWP isn't

- Not a regional policy making document
- Not a funding decision document, does not allocate funds
- No construction, design, or preliminary engineering
- Only includes transportation planning project of regional significance, upcoming fiscal year, primarily federally funded

Document Organization

Introduction

1. Metro led Regionwide Planning
2. Metro led Corridor/Area Planning
3. Metro Administration & Support
4. State led Planning of Regional Significance
5. Locally led Planning of Regional Significance



TPAC recommendation

- TPAC recommended approval of UPWP to JPACT at 4/5 meeting and incorporated refinements identified during the comment period.
- Refinements reflected input from TPAC members, FHWA, FTA, ODOT and other agencies that participated in the annual UPWP consultation (2/28).

Next Steps

- April 18 JPACT
- May 23 JPACT Action
- May 23 Metro Council Action
- May 27 Submit to USDOT & ODOT
- June 30 IGA signed by Metro COO

Questions?



Memorandum

To: C4 Metro Subcommittee
From: Team TPAC, Representing Clackamas County & Clackamas Cities
Re: April 5, 2024 TPAC Highlights
Date: April 9, 2024

Overview

Following is a summary of the April TPAC Meeting. Meeting materials can be found [here](#).

General Updates

- The New Federal Greenhouse Gas Performance Measure Target Setting Approach item on the agenda was delayed due to a multi-state lawsuit against the FHWA ([Texas](#) and [Kentucky](#) had court decisions). The region is continuing to work through the process, but is currently waiting to see the outcome from the lawsuit and what it means for the process.
- Climate Pollution Reduction Grant is a planning grant awarded to Metro from the EPA to create two climate action plans for the Metro statistical area (which goes beyond Metro's typical boundaries).
 - 1st planning deliverable was submitted at end of February. Actions in that plan are eligible to apply for implementation grants through a separate funding stream from the EPA. Five applications were submitted by agencies in the region, asking for about \$100 million
 - TriMet Electric Buses
 - TriMet/Metro Transit Prioritization
 - Washington County/Clackamas County/Vancouver Housing Authority requested funds to retrofit affordable housing to provide better energy efficiency
 - Metro applied for a similar grant to provide incentives for energy efficiency of newer housing constructed under the Transit Oriented Development program
 - Gresham applied to recapture waste methane generated by their Wastewater Treatment Plant
 - State of Oregon requested between \$100 million and \$200 million for various programs
 - State of Washington requested up to \$500 million for new state programs that invest resources to local and regional levels
 - EPA will announce awards in July (or a bit later)

CLACKAMAS COUNTY QUESTION

There are a lot of moving pieces around actions that we can do to reduce climate change. **Would it be worthwhile to have workgroups or a subcommittee to track all the different actions and climate-oriented funding opportunities?**

Metro will be working on a Comprehensive Climate Action Plan and an engagement plan. A review of the federal and state climate-related funding sources are a big part of the plan. More information regarding the 2nd phase of the EPA program will be shared with TPAC, hoping to start initial conversations in summer 2024.

- Preliminary data suggests there were 9 traffic deaths across the region since our meeting in March, three of which were in Clackamas County.
- Highlights are now being shared on how regional partners are working for safer streets. This month's highlights included the following:
 - City of Portland's "[Rest on Red](#)", which makes traffic signals display a red indication in all directions during late night/early morning hours. This change in signal behavior is expected to reduce speeding and crashes attributed to speeding.
 - [2024 Oregon Active Transportation Summit](#), which is held by the Street Trust runs June 5th-7th and will provide presentations, workshops, and field trips focused on solving transportation issues. Registration is open and schedule to come next week.
 - [Clackamas County's Traffic Safety Videos](#), which provide wide-spread messaging of safe driving behavior through short videos. These are developed by Rob Sadowsky, the County's Transportation Safety Outreach Coordinator, with the help of the County's Traffic Safety Commission.
- TPAC approved an MTIP amendment to incorporate five new projects, including 2 ODOT Safety "Project Grouping Buckets" (PGB) and 3 TriMet projects. PGBs are funding accounts that improve the efficiency of awarding funds, since they don't have to come in for an MTIP amendment for each small piece.
 - ODOT Curve Warning Upgrades PGB, which improves signage on curves on identified roadways
 - ADA Curb Ramps Phase 1 PGB, which may fund up to 350 of 3,899 possible locations identified.
 - TriMet Better Electric Buses Purchases
 - Gateway Transit Center Upgrades, which incorporates Congressionally Directed Spending (CDS)
 - Columbia Zero Emissions Bus Operations Facility, which also incorporates CDS

2024-2025 Unified Planning Work Program (UPWP)

The UPWP is an annual document that guides transportation planning activities conducted each fiscal year. The UPWP does not make funding allocations or include construction, design, or preliminary engineering projects. It only includes planning projects that will receive federal dollars (and some locally funded projects of regional significance).

Approval of the 2024-2025 UPWP is required to receive federal transportation planning funds. JPACT is anticipated to review the UPWP at its April 18 meeting and take action on May 16.

Members of TPAC acknowledged that Metro had addressed most of the comments raised in the March 1st meeting and unanimously approved to recommend approval by JPACT.

2028-2030 Regional Flexible Fund Allocation (RFFA) Program Direction

Background

Last month TPAC had a brief discussion on the allocation of regional flexible funds for 2028-2030. Regional flexible funds are federal transportation dollars comprised of the Surface Transportation Block Grant (STBG) and Congestion Mitigation & Air Quality (CMAQ) funds. In total, **flexible funds only account for about 5%** of all transportation funding in the region. In the 2025-2027 allocation, that amounted to approximately \$152M.

Program Direction

Metro provide some initial options for **RFFA program direction**. The program direction articulates the region's intent for how regional funds should be targeted to achieve RTP priorities, sets objectives for the allocation process (e.g., technical evaluation criteria) and defines funding categories. Currently, the RFFA is allocated through a two-step process. Step 1 satisfied debt repayments and funds regional programs. Step 2 funds competitive

capital grants to local governments. At this time, Metro staff estimates that there could be about **\$60M available in Step 2 funding**. For context, there was just under \$47.5M in Step 2 funding available last cycle.

For Step 1, Metro initiated discussion on whether we should consider a new bond commitment for the funds. A new project bond would:

- Be a method to utilize regional revenues on regional scale impact projects.
- Advance the ability to construct projects earlier than would otherwise be possible.
- Leverage significant discretionary federal revenue that will otherwise be allocated to other metropolitan areas.
- Continue the past practice to use bonded RFFA revenues to advance transportation projects that improve equitable access to jobs and services, reduce climate impacts, and improve safe travel on the transportation system.

Metro staff provided scenario examples based on the amount of bond and how revenue could trend in the next 15 years to show how bonding could impact future Step 2 funding to capital projects. The scenarios demonstrated that it should be possible to create a bond proposal that does not have a risk to significantly reduce Step 2 funds.

FOOD FOR THOUGHT

Is this a good time to borrow money? While rates would be locked in when a project is identified and funding is needed, the current market is not as appealing for borrowing money.

What projects would we expect the bonding to help advance? Currently, projects to receive funding have not been identified. Metro recommended some project principles to help determine potential projects and invited TPAC input.

For Step 2, Metro presented options for additional technical evaluation criteria, including the following (with identified RTP Goal Area):

- Meets a transportation need identified by the community (Equitable Transportation)
- Reduces impacts/mitigates for weather events (Climate Action and Resilience)
- Increases stability of existing critical transportation infrastructure (Climate Action and Resilience)
- Increased travel and lane use efficiency (Mobility Options)
- Increased access to jobs (Thriving Economy)
- Increased access to centers (Thriving Economy)
- Increased access to industrial and transport facilities (Thriving Economy)

Metro also offered the option to consider proposed design elements of projects as its own criteria in the technical evaluation, specifically for projects requesting funds for construction.

Furthermore, Metro provided the options regarding Step 2 Objectives for this RFFA cycle. Based on input showing the desire to see the region make greater progress towards the five RTP goals in the near term, Metro staff recommended the following options:

- Increase the minimum funding request for project development work from \$500,000 to \$1 million
- Increase the minimum funding request for capital projects from \$3 million to \$4 million
- Reduce the limit on the number of Step 2 applications from 42 to 34 (each sub-region would have their maximum number applications reduced by 2, which would result in 10 for Portland, 9 for Washington County, 8 for Clackamas County, and 7 for east Multnomah County)

Based on comments from jurisdictional partners regarding efforts to ensure these funds are able to be attained across the region, Metro staff recommended the following options:

- Projects which received funding for construction in the 2025-2027 RFFA cycle would be ineligible for funding through the upcoming cycle. This would only be for projects asking for more funding and not for projects adjacent to a previous one.
 - Projects which received project development funding in the previous cycle would remain eligible for construction funding.
- Provide technical assistance to small jurisdictions for developing applications.
- Institute a pre-application window and notice of intent to apply prior to the opening of the Step 2 application window.

FOOD FOR THOUGHT

What problems would increasing the project minimums or reducing the maximum number of applications solve? It is unknown if there is an issue that would be solved with requiring projects to be more expensive. Also, while Clackamas County did not submit the maximum number of applications last cycle, reducing the limit on applications can put the County at a higher risk of needing to reject an application from a smaller jurisdiction.

Does increasing the minimum cost for project development or capital projects create a barrier for smaller jurisdictions to apply for funding? Many smaller jurisdictions may not have projects that fit the \$1 million for planning or \$4 million for construction, which negates the efforts to ensure funds reach across the region.

If the goal is to make more progress towards the five RTP goals, the solution may not be asking for larger projects and less applications, but ensuring more projects around the region are funded and completed.

Upcoming Agenda Highlights

APRIL 10 – TPAC WORKSHOP	MAY 3 – REGULAR MEETING
<ul style="list-style-type: none"> • 2028-2030 RFFA Step 1 Regionwide Programs and Planning Activities Overview • TriMet and SMART – Budget Updates and Programming of Projects • ODOT Update on Funding Allocations for 28- 30 (Leverage, ARTS, etc.) 	<ul style="list-style-type: none"> • 27-30 MTIP Program Direction - Recommendation to JPACT • 28-30 Regional Flexible Fund Program Direction - Discussion of Options • Kick-off to the Transportation Demand Management and Regional Travel Options Strategy Update • Redistribution – Introduction and Proposed Options
JUNE 7 - REGULAR MEETING	JUNE 12 – TPAC WORKSHOP
<ul style="list-style-type: none"> • 28-30 Regional Flexible Fund Program Direction – Recommendation to JPACT • Redistribution – Recommendation to JPACT • Federal Greenhouse Gas Target – Recommendation to JPACT • Safe Streets for All Update 	<ul style="list-style-type: none"> • ODOT Update on Funding Allocations for 28-30 • 28-30 RFFA Technical Evaluation Criteria - Discussion

For More Information, Contact Team TPAC

COUNTY REPS

Karen Buehrig, Clackamas County
karenb@clackamas.us

Jamie Stasny, Clackamas County
jstasny@clackamas.us

CITY REPS

Jaimie Lorenzini, City of Happy Valley
jaimiel@happyvalleyor.gov

Dayna Webb, City of Oregon City
dwebb@orcity.org

Will Farley, City of Lake Oswego
wfarley@ci.oswego.or.us