
Wednesday, July 15, 2020
7:30 AM – 9:00 AM

Digital Meeting:

https://clackamascounty.zoom.us/webinar/register/WN_hkicokQ-OEOeWtFzGmgA

Meeting ID: 983 3061 5006

Password: 687227

Telephone option: 1 (408) 638-0968

Agenda

7:30 a.m. Welcome & Introductions

7:35 a.m. MPAC Issues

- Supportive Housing Services Program Update
Presenting: Jill Smith, Housing Authority of Clackamas County

8:05 a.m. JPACT Issues

Presented by TPAC Staff

- MTIP Amendments
- Unified Planning Work Program (UPWP) Update

8:30 a.m. Other Issues

- HB 2001 (2019) Rulemaking
Presenting: Martha Fritzie, Principle Planner Clackamas, and Chris Storey, Assistant Director Water Environment Services
- Get Moving 2020 Status
Presenting: Jamie Stasny, Clackamas County Transportation and Development

9:00 a.m. Adjourn

Attachments:	JPACT/MPAC Work Programs	Page 02
	Supportive Housing MPAC Power Point	Page 06
	MTIP Materials	Page 28
	UPWP Memo	Page 46
	HB 2001 Rulemaking Memo	Page 49



2020 JPACT Work Program
As of 04/09/20

Items in italics are tentative

<p><u>April 16, 2020</u></p> <ul style="list-style-type: none"> • Resolution No. 20-5094, For the Purpose of Adding New or Amending Existing Projects to the 2018-21 Metropolitan Transportation Improvement Program Which Involves Project Changes to Five Projects Impacting Gresham, ODOT, and TriMet (AP20-11-APR) (consent) • Federal Affairs Update (Information/Discussion - Bernie Bottomly, TriMet/Tyler Frisbee, Metro; 10 min) • Congestion Pricing Study Update (Information/Discussion - ODOT/PBOT/Metro; 40 min) • Resolution No. 20-5086, For the Purpose of Adopting the Fiscal Year 2020-21 Unified Planning Work Program and Certifying that the Portland Metropolitan Area is in Compliance with Federal Transportation Planning Requirements (Information/Discussion – John Mermin, Metro; 10 min) 	<p><u>May 21, 2020</u></p> <ul style="list-style-type: none"> • <i>Mobility Policy Update (TBD; 20 min)</i> • Update on Division Transit (TBD, TriMet; 20 min) • Regional Transportation Measure (Margi Bradway/Andy Shaw, Metro; 20 min) • Resolution No. 20-5086, For the Purpose of Adopting the Fiscal Year 2020-21 Unified Planning Work Program and Certifying that the Portland Metropolitan Area is in Compliance with Federal Transportation Planning Requirements (Action Requested; 5 min)
<p><u>June 18, 2020</u></p> <ul style="list-style-type: none"> • <i>Congestion Pricing Study Update (20 min)</i> • <i>Freight Commodity Study/Planning (20 min)</i> • <i>Annual Traffic Safety Report (Lake McTighe, Metro; 10 min)</i> 	<p><u>July 16, 2020</u></p> <ul style="list-style-type: none"> • 2021-2024 Metropolitan Transportation Improvement Program (Grace Cho, Metro) (Action Requested; 20 min) • <i>Mobility Policy Update (20 min)</i> • <i>Jurisdictional Transfer Update (20 min)</i>

<p><u>August 20, 2020</u></p>	<p><u>September 17, 2020</u></p> <ul style="list-style-type: none"> • <i>Mobility Policy Update (20 min)</i>
<p><u>October 15, 2020</u></p> <ul style="list-style-type: none"> • <i>Emergency Transportation Routes Update (20 min)</i> <p><u>October 15-17</u>: League of Oregon Cities Conference, Salem <u>October 15</u>: Oregon Mayor’s Association Meeting, Salem</p>	<p><u>November 19, 2020</u></p> <ul style="list-style-type: none"> • <i>Jurisdictional Transfer Assessment – Draft Recommendations (20 min)</i>
<p><u>December 17, 2020</u></p>	

Parking Lot:

- *TSMO Plan Update (Ted Leybold/Caleb Winter, Metro)*
- *Emerging Technology (Ted Leybold/Eliot Rose, Metro)*

2020 TPAC Work Program

As of 7/2/2020

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

<p>July 10, 2020 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 2020-21 UPWP administrative amendments (John Mermin) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-5116 Recommendation to JPACT (Lobeck, 15 min) • 2020-21 UPWP amendment ODOT – Pedestrian & Bicycle Crossing: Oregon City to West Linn <u>Information/Discussion</u> (John Mermin, 15 min) • ODOT’s I-5 & I-205 tolling projects update <u>Information/Discussion</u> (Glen Bolen/Lucinda Broussard, 45 min) • Jurisdictional Transfer project update <u>Information/Discussion</u> (John Mermin/Glen Bolen, 30 min) 	<p>August 7, 2020 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-**** Recommendation to JPACT (Lobeck, 25 min) • Freight Commodity Study/Planning <u>Information/Discussion</u> (Tim Collins, 20 min) • Columbia-Lombard Mobility Corridor Plan <u>Information/Discussion</u> (Bryan Poole, Portland Bureau of Transportation, 40 min) • Regional Mobility Policy Update (Kim Ellis, Metro/Lidwien Rahman, ODOT; 20 min)
<p>September 4, 2020 virtual meeting</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-**** Recommendation to JPACT (Lobeck, 15 min) • 2021 PILOT Grants <u>Information/Discussion</u> (Eliot Rose, 30 min) • Active Transportation Return on Investment Study: Interim Findings <u>Information/Discussion</u> (John Mermin, Jennifer Dill, 40 minutes) • Jurisdictional Transfer – Draft Report <u>Information/Discussion</u> (John Mermin, 20 min) 	<p>October 2, 2020</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-**** Recommendation to JPACT (Lobeck, 15 min) • Oregon Passenger Rail Corridor Investment Plan, FRA Decision of Record (Jennifer Sellers, ODOT/Mara Krinke, Parametrix/Andrew Mortensen, David Evans, Inc., 40 min) • 2020 TSMO Strategy Update Progress <u>Information/Discussion</u> (Caleb Winter, 40 min) • <i>Transportation for America “Smart Cities Collaborative” program updates</i> <u>Information/Discussion</u> (Eric Hess, City of Portland/Katherine Kelly, City of Gresham/Eliot Rose, Metro; 40 min) • Committee Feedback on Creating a Safe Space at TPAC <u>Information/Discussion</u> (Kloster, 10 min)

2020 TPAC Work Program

As of 7/2/2020

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

<p>November 6, 2020</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min) • Regional Mobility Policy Update: Case Studies & Policy Approaches Discussion <u>Information/Discussion</u> (Kim Ellis, Metro/Lidwien Rahman, ODOT, 40 min) • <i>Interstate Bridge Replacement Program Partnership Resolution Update</i> <u>Information/Discussion</u> (Ally Holmqvist, 30 min) • Committee Feedback on Creating a Safe Space at TPAC <u>Information/Discussion</u> (Kloster, 10 min) 	<p>December 4, 2020</p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • COVID-19 updates and information from Metro & Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 20-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min) • Recommendation to JPACT on Jurisdictional Transfer <u>Recommendation to JPACT</u> (John Mermin, 30 min) • Committee Feedback on Creating a Safe Space at TPAC <u>Information/Discussion</u> (Kloster, 10 min)
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Parking Lot: Future Topics/Periodic Updates

- | | |
|---|---|
| <ul style="list-style-type: none"> • Corridor Planning Updates (1) TV Highway, (2) Rose Quarter, (3) Burnside Bridge • Implement Local Climate Plans & Climate Smart Strategy Updates • Enhanced Transit Update • TPAC Democratic Rules Training (Kloster) • Metro Legislative Updates (Randy Tucker) • Update on SW Corridor and/or Division Transit | <ul style="list-style-type: none"> • Value Pricing Legislative Updates on Directives • Columbia Connects Project • 2020 Census • Ride Connection Program Report (Julie Wilcke) • Get There Oregon Program Update (Marne Duke) • Update on US Congress INVEST in America Act and HEROS Act (informational) |
|---|---|

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

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



Metro

Supportive Housing Services

A new regional program | July 2020

Metro Measure 26-210

Framework created by HereTogether, a coalition of businesses and social service agencies

Metro Council referred measure in February 2020

Regional voters approved in May with 58 percent support

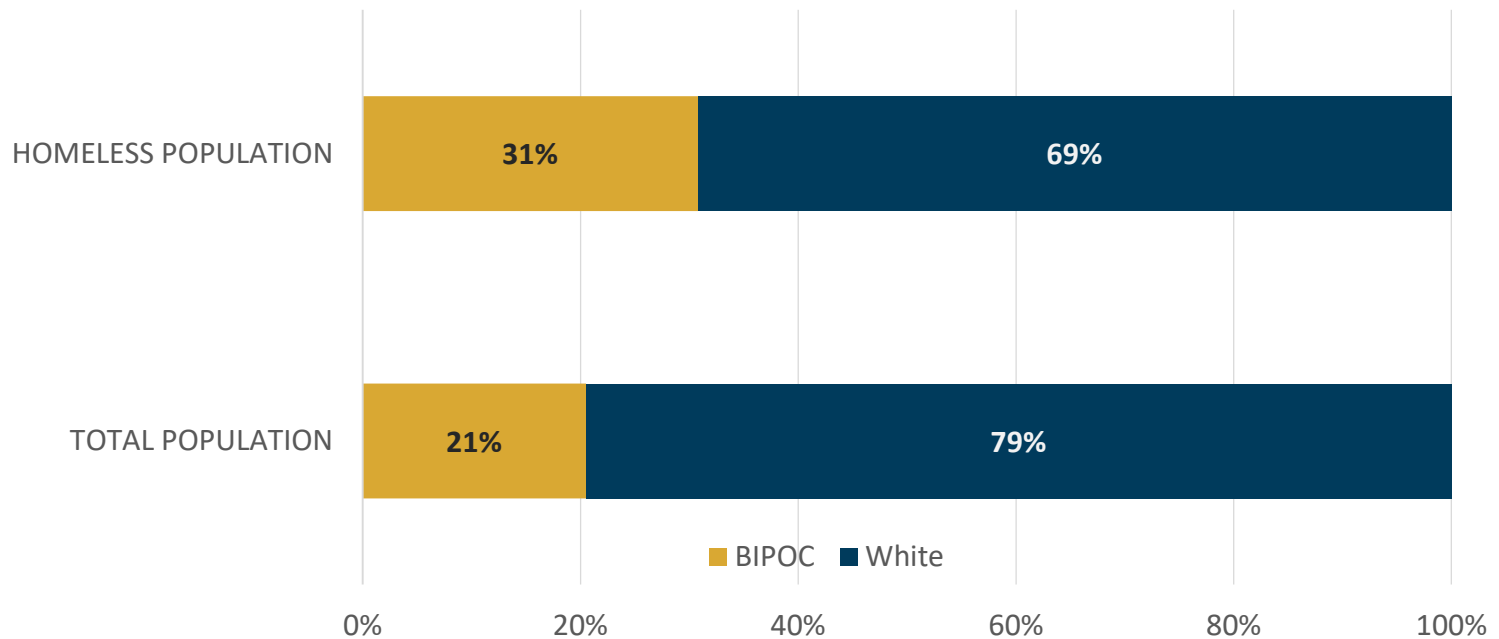


Homelessness across our region

Point-in-Time count	5,711 people experiencing homelessness
Student homelessness	7,134 students (K-12) experiencing homelessness
Chronic or prolonged homelessness	as many as 4,935 households
At risk of prolonged homelessness	as many as 17,500 households
Severely rent burdened	as many as 56,000 households

Homelessness and race

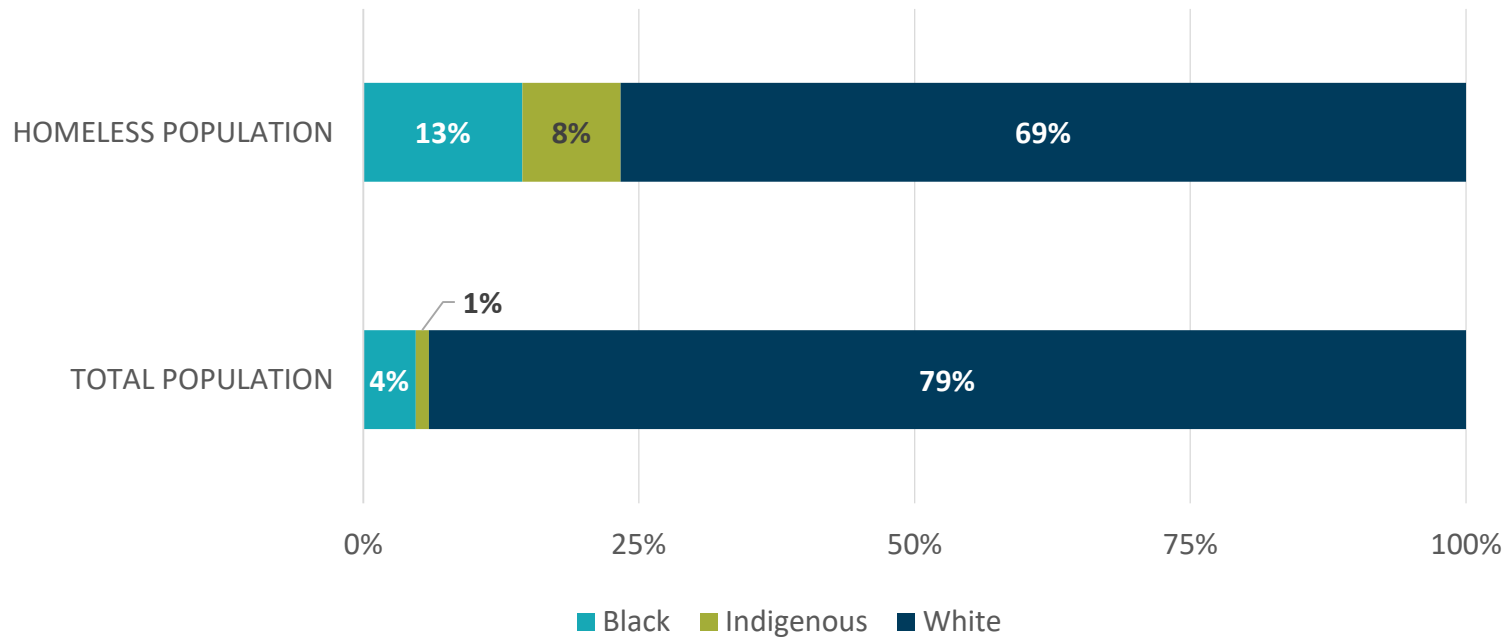
BIPOC* make up 21% of the total population in the tri-county area but comprise 31% of the homeless population.



For combined populations of Clackamas, Multnomah, and Washington Counties. Total Population: US Census 2018. Homeless population: 2019 PIT Counts, as reported to HUD. Note that Census and PIT data may undercount BIPOC and homeless populations. BIPOC in this count includes: Black or African American, American Indian or Native Alaskan, Native Hawaiian or Other Pacific Islander, Asian, and Multiple Races; the HUD Point-in-Time Counts do NOT offer counts for white and non-white Hispanic or Latino people. "White" as used here includes both Hispanic and non-Hispanic whites.

Homelessness and race

Black and Indigenous people make up 5% of the total population but comprise over 20% of homeless population.



For combined populations of Clackamas, Multnomah, and Washington Counties. Total Population: US Census 2018. Homeless population: 2019 HUD PIT Counts. Note that Census and PIT data may undercount BIPOC and homeless populations. PIT Counts do NOT offer demographic data differentiating between Hispanic and non-Hispanic whites. "Indigenous" as used here includes American Indian or Native Alaskan and Native Hawaiian or Pacific Islander. "Black" as used here includes Black and African American people. "White" as used here includes both Hispanic and non-Hispanic whites.

Supportive Housing Services

Long-term rent assistance, rapid rehousing and eviction prevention

Housing and ongoing case management

Mental healthcare, addiction and recovery services

Employment supports, peer supports, and more as needed



Prioritizing communities in need

Communities of color and those disproportionately impacted by homelessness

People with disabilities experiencing, or at risk of, prolonged homelessness, and with extremely low incomes

People experiencing episodic homelessness or at risk of homelessness



Governance and accountability

Local implementation plans and Intergovernmental agreements

Regional community oversight committee

Tri-county planning and advisory body

Independent performance and finance audits

Voter approval required after 10 years



New revenue mechanisms

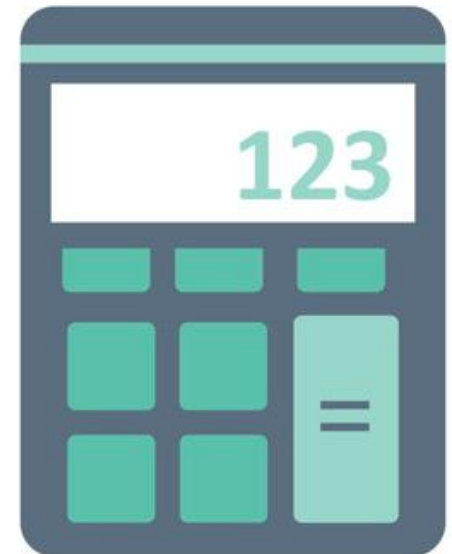
1% High-Earner Marginal Income Tax

- Income earned within Metro region above \$200k / \$125k (joint/single)

1% Business Profits Tax

- Net income of businesses with gross receipts of more than \$5 million

Both taxes begin January 2021



Distribution of resources

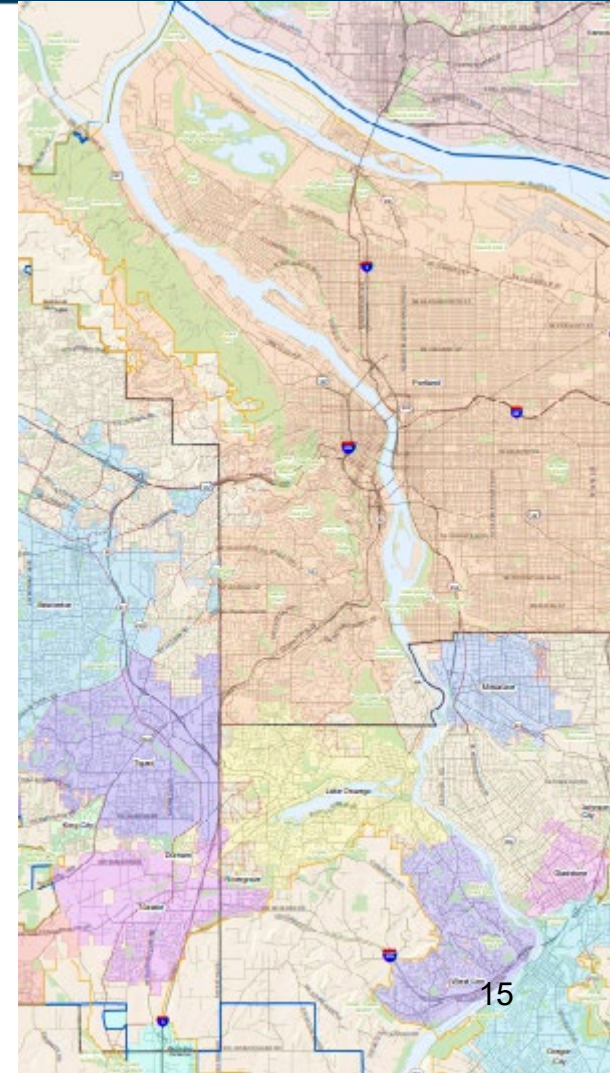
Income-based distribution:

Multnomah County — 45.33%

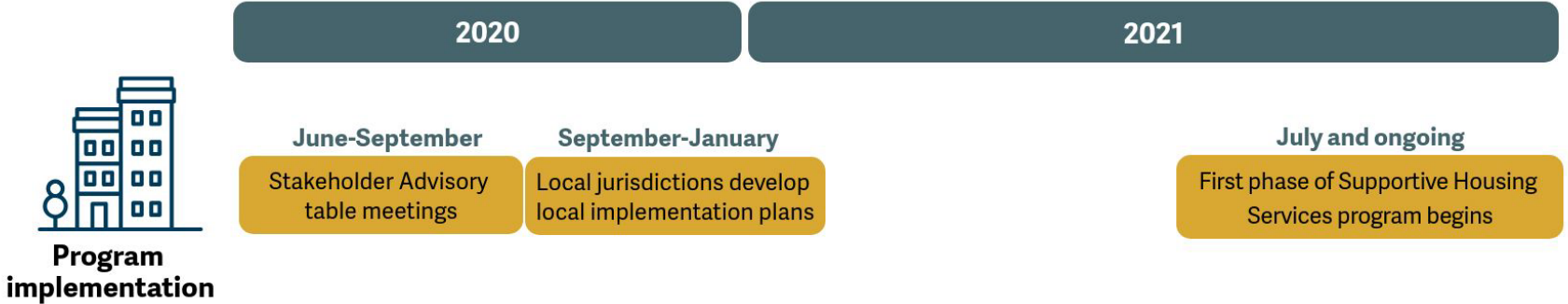
Washington County — 33.33%

Clackamas County — 21.33%

Up to 5% to Metro for oversight & administration



Implementation readiness



Stakeholder advisory table

22 community leaders from service agencies and businesses

Advising Metro and County staff

Refine regional values, metrics for outcomes, and local plan requirements

Equity outcomes subcommittee

July - September



Local Implementation Plans

Existing advisory bodies, and inclusive community participation

Plans will include:

- Commitment to racial equity
- Commitment to regional priorities, metrics, and coordination
- Local need analysis and local program investment priorities

September - January



Oversight Committee

15 members, 5 from each County

Serve as independent, public officials

Ensure transparent oversight and accountability to voters

2-year terms begin Fall 2020



Tri-county advisory body

Governance to be developed with counties and stakeholders

Inclusive representation will include subject matter expertise and lived experience

Will advise on regional coordination and systems alignment

At least 5% of program funds allocated for regional impact



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Summer Implementation Advisory Structures

Process for answering regional questions necessary for the creation of local implementation plans and outcomes metrics for future regional oversight and accountability

Stakeholder Advisory Table
affirms values, refines programmatic implementation, and determines outcome metrics that instruct the local implementation plan

Equity Outcomes Subcommittee
ensures equity is fully a part of outcomes and metrics



Advise

Metro Chief Operating Officer



Instructs

Tax Implementation Advisory Table
ensures a smooth, legal, and easy tax collection start-up



Local Implementation Plans
Plans developed locally in three Counties with local advisory tables and community engagement,
Approval process: local County boards, Oversight Committee, Metro Council

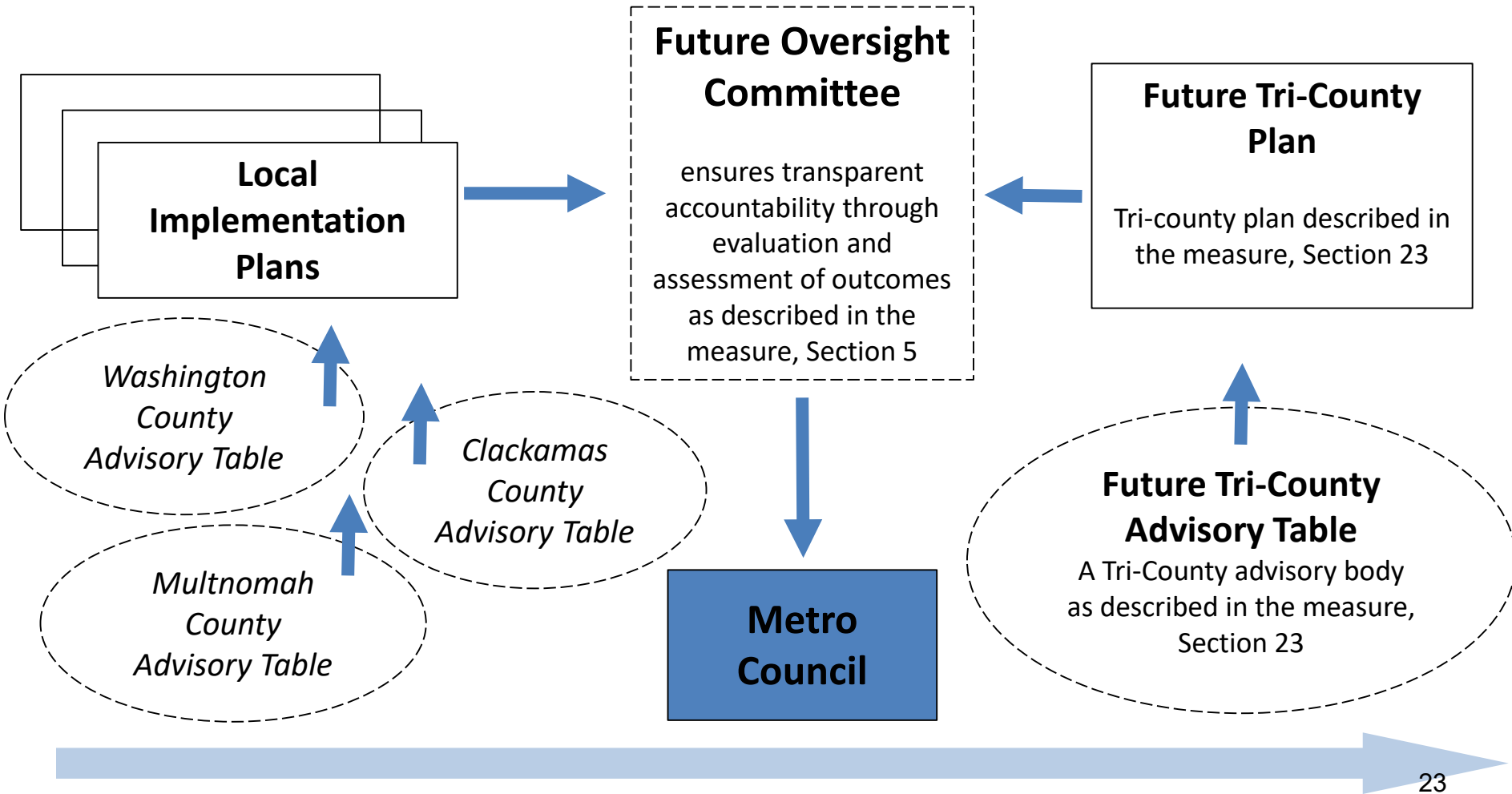


July

August

September

Ongoing Advisory Structures



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Strive towards housing for all

Lead with racial equity

Fund proven solutions

Leverage existing capacity

Evolve systems to improve

Demonstrate outcomes and impact

Ensure transparent oversight and accountability

Regional Values

to guide
implementation
of the Supportive
Housing Services
program

Draft 7.6.2020

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Meeting #1 — July 6th
Orientation and regional values

Meeting #2 — July 28th
Local Implementation Plan requirements

Meeting #3 — August 27th
Regional metrics

Meeting #4 — September 9th
Conclusions and next steps

Stakeholder
Advisory Table

Meeting Goals

Proposed 7.6.20

MEMORANDUM

TO: C4 Metro Subcommittee
FROM: Steve Williams, Principal Transportation Planner
DATE: July 9, 2020
SUBJECT: Amendment to the 2018-2021 Metropolitan Transportation Improvement Program

Two amendments are proposed to the 2018-2021 Metropolitan Transportation Improvement Program (MTIP) for consideration by JPACT at their July 16, 2020 meeting:

1. **Sandy Blvd: NE 181st Ave to East Gresham City Limit** – The adopted MTIP includes earlier estimates for the cost of this project prepared based on preliminary studies. Gresham has recently completed the final design process for the project. In the final design process several additional needs were identified including culvert replacement, traffic signal modifications, additional base and earth work, and additional stormwater planters. As a result, the total project cost has increased from \$4,029,202 to \$5,233,403, an increase of \$1,204,201. City of Gresham is increasing their contribution to the project by that amount to make up the increased cost. The Federal funds committed to the project (\$3,284,751) will not change from the previously approved amounts.
2. **Portland Oregon Regional Transportation Data Archive Listing (PORTAL)** – PORTAL is a multimodal transportation data archive maintained by Portland State University. PORTAL plays an important role in traffic signal coordination and operations across the region, and also coordinates response to crashes. The regional program also includes strategy planning and coordination of activities for the TransPort subcommittee of TPAC, archives information on intelligent transportation system design are updated and maintained, training is provided for PORTAL users and data is live-streamed for vehicle and mobile information systems. This amendment will enable upgrades to the archive and databases to improve service and expand capabilities. The total funding for the project is \$668,672 with \$600,000 from a grant of Federal TSMO funds previously awarded by Metro and \$68,672 provided by ODOT and Portland State University.

TPAC will consider this amendment at their meeting on Friday, July 10, 2020 and staff will provide a verbal report on TPAC's action at the meeting.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING OR) RESOLUTION NO. 20-5116
AMENDING EXISTING PROJECTS TO THE)
2018-21 METROPOLITAN TRANSPORTATION) Introduced by: Chief Operating Officer
IMPROVEMENT PROGRAM WHICH INVOLVES) Andrew Scott in concurrence with
CHANGES TO GRESHAM'S SANDY BLVD) Council President Lynn Peterson
RECONSTRUCTION PROJECT AND ADDING)
METRO'S TSMO/ITS PORTAL PROJECT (JL20-)
14-JUL))

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

WHEREAS, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved the 2018-21 MTIP via Resolution 17-4817 on July 27, 2017; and

WHEREAS, JPACT and the Metro Council must approve any subsequent amendments to add new projects or substantially modify existing projects in the MTIP; and

WHEREAS, the U.S. Department of Transportation (USDOT) has issued clarified MTIP amendment submission rules and definitions for MTIP formal amendments and administrative modifications that both ODOT and all Oregon MPOs must adhere to which includes that all new projects added to the MTIP must complete the formal amendment process; and

WHEREAS, MTIP amendments now must also include assessments for required performance measure compliance, expanded RTP consistency, and strive to meet annual Metro and statewide obligation targets resulting in additional MTIP amendment processing practices and procedures; and

WHEREAS, the city of Gresham's Sandy Blvd reconstruction project has completed its Plans, Specifications, and Estimates (PS&E) package and now requires a commitment of additional local funds to fully fund the construction phase which is occurring through this amendment allowing the construction phase to be obligated before the end of federal fiscal year 2020; and

WHEREAS, Metro has awarded Portland State University \$600,000 of Regional Flexible Fund Allocation – Step 1 funds to continue data collection, integration, and management over a multi-year period of the Portland Oregon Regional Transportation Data Archive Listing (PORTAL) which is a critical data clearinghouse for the Metro Regional Transportation Systems Management and Operations (TSMO)/Intelligent Transportation System (ITS) program; and

WHEREAS, the a review of the proposed project changes has been completed against the current approved Regional Transportation Plan (RTP) to ensure the projects remain consistent with the goals and strategies identified in the RTP with the results confirming that no RTP inconsistencies exist as a result of the project changes from the July 2020 MTIP Formal Amendment; and

WHEREAS, the RTP consistency check areas included financial/fiscal constraint verification, eligibility and proper use of committed funds, an assessment of possible air quality impacts, a deviation assessment from approved regional RTP goals and strategies, a validation that the required changes have

little or no impact upon regionally significant projects, and a reconfirmation that the MTIP's financial constraint finding is maintained a result of the July 2020 Formal Amendment; and

WHEREAS, Metro's Transportation Policy and Alternatives Committee (TPAC) received their notification plus amendment summary overview, and recommended approval to Metro's Joint Policy Advisory Committee on Transportation (JPACT) on July 10, 2020; and

WHEREAS, JPACT received their notification and approved Resolution 20-5116 consisting of the July 2020 Formal MTIP Amendment bundle on July 16, 2020 and provided their approval recommendation to Metro Council; now therefore

BE IT RESOLVED that the Metro Council hereby adopts the recommendation of JPACT on July 30, 2020 to formally amend the 2018-21 MTIP to include the required changes, advancements, or additions to the two identified projects as part of Resolution 20-5116.

ADOPTED by the Metro Council this ____ day of _____ 2020.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

**2018-2021 Metropolitan Transportation Improvement Program
Exhibit A to Resolution 20-5116**



Proposed July 2020 Formal Amendment Bundle Amendment Type: Formal/Full Amendment #: JL20-14-JUL Total Number of Projects: 2					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 19279	70684	Gresham	Sandy Blvd: NE 181st Ave to E Gresham City Limit	The project will construct multimodal and freight access and mobility facilities along Sandy Boulevard between 181st Avenue and east Gresham city limits.	<p><u>COST INCREASE:</u></p> <p>The formal amendment increases the construction phase to address the 100% design final cost estimate for the project. The construction phase increases from \$2,662,821 to \$3,903,022. The total project cost is \$1,204,201 and equals a 29.8% increase to the project. The construction phase was programmed with a preliminary phase cost before final design and cost estimates were determined.</p>
Project #2 Key TBD New Project	TBD	Metro	Multimodal Transportation Data Archive (PORTAL)	2019-21 Metro TSMO allocation to maintain data feeds and internal system patches, network upgrades, etc. Maintain backup and storage of data archive. Provide PORTAL training to users.	<p><u>ADD NEW PROJECT:</u></p> <p>The formal amendment adds the new 2019 TSMO awarded project to the 2018 MTIP allowing the STBG funds to be obligated before the end of the federal fiscal year (September 1, 2020)</p>



Metro
2018-21 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
COST INCREASE
7th Amendment to Project

Lead Agency: Gresham		Project Type: Reconst	ODOT Key: 19279
Project Name: Sandy Blvd: NE 181st Ave to E Gresham City Limit	1	ODOT Type: Operations	MTIP ID: 70684
		Performance Meas: Yes	Status: 4
		Capacity Enhancing: No	Comp Date: 12/31/2021
		Conformity Exempt: Yes	RTP ID: 10443
		On State Hwy Sys: No	RFFA ID: 50237
		Mile Post Begin: N/A	RFFA Cycle: 2016-18
		Mile Post End: N/A	UPWP: No
		Length: N/A	UPWP Cycle: N/A
		1st Year Program'd: 2015	Past Amend: 6
		Years Active: 6	OTC Approval: Yes
STIP Amend #: TBD	MTIP Amnd #: JL20-14-JUL		
Detailed Description: The project will construct multimodal and freight access and mobility facilities along Sandy Boulevard between 181st Avenue and east Gresham city limits.			
STIP Description: Construction of multimodal, freight access and mobility facilities			

Last Amendment of Modification: July 2019, AB19-18-JUL2 - STIP Re-Balancing Amendment - Cons Slip to 2020: Increase PE phase adding local Other funds of \$36k increasing PE from \$664,605 to \$700,605. Slip UR phase to from 2019 to 2020. No change in phase cost. Slip Cons from 2019 to 2020. No change in phase cost. TPC increases to \$4,029,202. - KL

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
STP-U	M23E	2015		\$ 596,350				\$ 596,350
STP-U	Z230	2018			\$ 462,806			\$ 462,806
STP-U	Z230	2020				\$ 134,595		\$ 134,595
STP-U	Z230	2020					\$ 2,091,000	\$ 2,091,000
ADVCON	ACPO	2020					\$ 298,350	
							Federal Totals:	\$ 3,284,751
Federal Fund Obligations:				\$ 596,350	\$ 462,806			Federal Aid ID
EA Number:				PE002559	R9384000			3125(056)
Initial Obligation Date:				9/17/2015	7/24/2018			
State Funds								
								\$ -
								\$ -
							State Total:	\$ -
State Fund Obligations:								
EA Number:								
Initial Obligation Date:								
Local Funds								
Local	Match	2015		\$ 68,255				\$ 68,255
Other	OTH0	2015		\$ 36,000				
Local	Match	2018			\$ 52,970			\$ 52,970
Local	Match	2020				\$ 15,405		\$ 15,405
Local	Match	2020					\$ 239,324	\$ 239,324
Local	Match	2020					\$ 34,147	\$ 34,147
Other	OVM	2020					\$ 1,240,201	\$ 1,240,201
							Local Total	\$ 1,240,201
Phase Totals Before Amend:			\$ -	\$ 700,605	\$ 515,776	\$ 150,000	\$ 2,662,821	\$ 4,029,202
Phase Totals After Amend:			\$ -	\$ 664,605	\$ 515,776	\$ 150,000	\$ 3,903,022	\$ 5,233,403
							Year Of Expenditure (YOE):	\$ 5,233,403

Notes and Summary of Changes:

Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment increases the construction phase to address the 100% design final cost estimate for the project. The construction phase increases from \$2,662,821 to \$3,903,022. The total project cost increases from \$4,029,202 to \$5,233,403 which equals a \$1,204,201 increase to the project or 29.8% increase to the project. The construction phase was programmed with a preliminary phase cost before final design and cost estimates were determined. Contributing to the construction phase cost increase includes the required culvert replacement, traffic signal modifications, aggregate base work, earthwork, and stormwater planters which were not part of the initial scoping effort.

> Will Performance Measurements Apply: Yes

RTP References:

> RTP ID: 10443 - Sandy - 181st to 202nd - Multimodal Improvements

> RTP Description: Widens Sandy Blvd. to 5 lanes and adds new sidewalk, multi-use path, bike lanes from 181st to 202nd Ave.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.

> UPWP amendment: Not applicable & not required

> RTP Goals: Goal 10 - Fiscal Stewardship

> Goal Objective 10.1 Infrastructure Condition

> Goal Description: Plan, build and maintain regional transportation assets to maximize their useful life, minimize project construction and maintenance costs and eliminate maintenance backlogs.

Fund Codes:

> STP-U = Federal Surface Transportation Program funds appropriated to the states with a portion allocated directly to the MPOs.

> ADVCON = Federal Advance Construction p=funds which are used as a placeholder and covered by ODOT until the final federal fund code is determined.

> Local = General local funds provided by the lead agency as part of the required match.

> Other = General local funds provided by the lead agency above the required match amount to support phase costs above the federal and match amount programmed.

Other

> On NHS: Yes - Sand/US30 is identified as a MAP-21 NHS Principal Arterial

> Metro Model: Yes - Sandy Blvd is identified as a Major Arterial in the Metro Motor Vehicle modeling network

> Model category and type: Pedestrian - Pedestrian Parkway

> TCM project: No

> Located on the CMP: Yes



Metro
2018-21 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

Formal Amendment
NEW PROJECT
Initial MTIP Programming

Lead Agency: Portland State University		Project Type: TSMO	ODOT Key: NEW
Project Name: Multimodal Transportation Data Archive (PORTAL)	2	ODOT Type: Ops/ITS	MTIP ID: NEW
		Performance Meas: Yes	Status: 1
		Capacity Enhancing: No	Comp Date: 12/31/2022
		Conformity Exempt: Yes	RTP ID: 11104
		On State Hwy Sys: N/A	RFFA ID: N/A
		Mile Post Begin: N/A	RFFA Cycle: 2019-21
		Mile Post End: N/A	UPWP: No
		Length: N/A	UPWP Cycle: N/A
		1st Year Program'd: 2020	Past Amend: 0
		Years Active: 0	OTC Approval: Yes
STIP Amend #: TBD		MTIP Amnd #: JL20-14-JUL	
Detailed Description: Maintain data feeds, handle any changes to data feeds, outages. Internal system patches, network upgrades, etc. Maintain backup and storage of data archive. Code maintenance and upgrades as necessary. Provide training or workshop opportunities open to PORTAL users, planners, researchers, and students; provide regular updates on PORTAL to TransPort and via the documentation website. Includes the Portal User Group which meets monthly. Disseminate results of this project through conference presentations, papers, and digital communications. (2019 Metro TSMO-RFFA Funding Award)			
STIP Description: TBD			

Last Amendment of Modification: None. New project being added to the MTIP

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (TMO/ITS)	Total
Federal Funds								
STBG-U	Z230	2020					\$ 600,000	\$ 600,000
								\$ -
								\$ -
							Federal Totals:	\$ 600,000
Federal Fund Obligations:								Federal Aid ID
EA Number:								
Initial Obligation Date:								
<hr/>								
State Funds								
State	S010	2020					\$ 11,145	\$ 11,145
								\$ -
ODOT State funds are committed as part of the required match							State Total:	\$ -
State Fund Obligations:								
EA Number:								
Initial Obligation Date:								
<hr/>								
Local Funds								
Local	Match	2020					\$ 57,527	\$ 57,527
								\$ -
							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ 668,672	\$ 668,672
							Year Of Expenditure (YOE):	\$ 668,672

Notes and Summary of Changes:

Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.

Amendment Summary:

The formal amendment adds the new 2019 TSMO awarded project to the 2018 MTIP allowing the STBG funds to be obligated before the end of the federal fiscal year (September 1, 2020). The PORTAL project is a technical data maintenance, upgrade and storage project in support of the regional Intelligent Transportation System/Transportation Systems Management and Operations program. Portland State University is the lead agency that will complete the required project tasks.

> Will Performance Measurements Apply: Yes

RTP References:

> RTP ID: 11104 - Regional TSMO Program Investments for 2018-2027

> RTP Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving "big data" processing (PSU PORTAL) to support analyzing performance measures.

> Exemption Status: Project is an exempt, non-capacity type project per 40 CFR 93.126, Table 2 -Safety - Traffic control devices and operating assistance other than signalization projects

> UPWP amendment: Not applicable & not required

> RTP Goals: Goal 4 - Reliability and Efficiency

> Goal 4.2 - Travel Management

> Goal Description: Increase the use of real-time data and decision-making systems to actively manage transit, freight, arterial and throughway corridors.

Fund Codes:

> STBG-U = Federal Surface Transportation Block Grant funds appropriated to the states with a portion allocated to the MPOs for various transportation system improvements

> State = General state funds provided in support of the required match or overmatch.

> Local = General local funds provided by the lead agency as part of the required match.

Other

> On NHS: N/A

> Metro Model:N/A

> Model category and type: N/A

> TCM project: No

> Located on the CMP: N/A



Memo

Date: June 30, 2020
 To: TPAC and Interested Parties
 From: Ken Lobeck, Funding Programs Lead, 503-797-1785
 Subject: July 2020 MTIP Formal Amendment & Resolution 20-5116 Approval Request

FORMAL AMENDMENT STAFF REPORT

FOR THE PURPOSE OF ADDING OR AMENDING EXISTING PROJECTS TO THE 2018-21 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM WHICH INVOLVES CHANGES TO GRESHAM'S SANDY BLVD RECONSTRUCTION PROJECT AND ADDING METRO'S TSMO/ITS PORTAL PROJECT (JL20-14-JUL)

BACKGROUND

What This Is:

The July 2020 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment which is contained in Resolution 20-5116 and being processed under MTIP Amendment JL20-14-JUL.

What is the requested action?

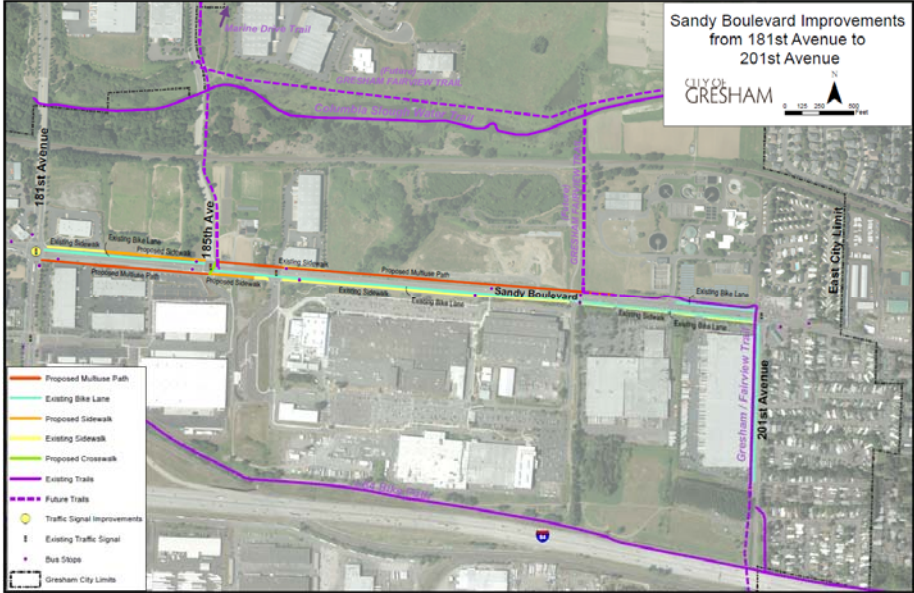
Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 20-5116 consisting of two projects in the July 2020 Formal Amendment Bundle enabling the projects to be amended correctly into the 2018 MTIP with final approval to occur from USDOT.

Proposed July 2020 Formal Amendment Bundle Amendment Type: Formal/Full Amendment #: JL20-14-JUL Total Number of Projects: 2					
ODOT Key #	MTIP ID #	Lead Agency	Project Name	Project Description	Description of Changes
Project #1 Key 19279	70684	Gresham	Sandy Blvd: NE 181st Ave to E Gresham City Limit	The project will construct multimodal and freight access and mobility facilities along Sandy Boulevard between 181st Avenue and east Gresham city limits.	<u>COST INCREASE:</u> The formal amendment increases the construction phase to address the 100% design final cost estimate for the project. The construction phase increases from \$2,662,821 to \$3,903,022. The total project cost is \$1,204,201 and equals a 29.8% increase to the project. The construction phase was programmed with a preliminary phase cost before final design and cost estimates were determined.

Project #2 Key TBD New Project	TBD	Metro	Multimodal Transportation Data Archive (PORTAL)	2019-21 Metro TSMO allocation to maintain data feeds and internal system patches, network upgrades, etc. Maintain backup and storage of data archive. Provide PORTAL training to users.	<u>ADD NEW PROJECT:</u> The formal amendment adds the new 2019 TSMO awarded project to the 2018 MTIP allowing the STBG funds to be obligated before the end of the federal fiscal year (September 1, 2020)
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A detailed summary of the two projects is provided below:

Project 1: Sandy Blvd: NE 181st Ave to E Gresham City Limit	
Lead Agency:	Gresham
ODOT Key Number:	19279 MTIP ID Number: 70684
Projects Description:	<p>Project Snapshot:</p> <ul style="list-style-type: none"> Proposed improvements: The project will construct multimodal and freight access and mobility facilities along Sandy Boulevard between 181st Avenue and east Gresham city limits. Source: Existing project. Funding: The project’s federal funding originates from the Metro 2016-18 Regional Flexible Funds Allocation(RFFA) program Project Type: Highway reconstruction Location: On Sandy Blvd Cross Street Limits: 181st Ave to East Gresham city Limits (201st Ave) Overall Mile Post Limits: N/A Current Status Code: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated). STIP Amendment Number: TBD MTIP Amendment Number: JL20-14-JUL
What is changing?	<p>AMENDMENT ACTION: COST INCREASE</p> <p>The formal amendment provides the required cost increase to the Construction phase based on the project now at 100% design. As the project progressed through the Plans, Specifications, and Estimates (PS&E) portion of Preliminary Engineering, detailed costs were applied to the associated scope deliverables.</p> <p>As projects progress through (PS&E), additional scope elements and/or updated element costs are refined. The final design package increases the construction phase cost from \$2,662,821 to \$3,903,022.</p> <p>A preliminary cost increase to the project was identified last year, but the actual programming correction was held-off until confidence in the</p>

	<p>Construction phase cost estimate accuracy was ready. Now that PS&E is wrapping up and the project moving towards the construction phase, the MTIP is being updated with the revised construction costs. This will enable the construction phase to obligate its federal funds before the ned of FY 2020.</p>
<p>Additional Details:</p>	<p style="text-align: center;">Project Location</p> 
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, the cost increase represents a 29.8% change to the project which is greater than the 20% threshold for cost increases resulting in the need for a formal amendment.</p>
<p>Total Programmed Amount:</p>	<p>The programming increases the total project cost from \$4,029,202 to \$5,233,403</p>
<p>Added Notes:</p>	<p>The formal amendment needs to occur now as a condition to obligate the construction phase before the end of FY 2020.</p>

<p>Project 2:</p>	<p>Multimodal Transportation Data Archive (PORTAL) (New Project)</p>		
<p>Lead Agency:</p>	<p>Metro</p>		
<p>ODOT Key Number:</p>	<p>TBD</p>	<p>MTIP ID Number:</p>	<p>TBD</p>
<p>Projects Description:</p>	<p>Project Snapshot:</p> <ul style="list-style-type: none"> • PORTAL = Portland Oregon Regional Transportation Data Archive Listing • Description: PORTAL is a component of Metro’s Transportation System Management and Operations (TSMO)/Intelligent Transportation System (ITS) Program. The Metro TSMO/ITS program provides centralized real-time and forecast traveler information is one 		

	<p>of the main goals of this TSMO plan. Accurate and comprehensive real-time traveler information allows system users to make informed decisions about their route, mode of transportation and time of day they travel. Ideally this will lead to optimal roadway usage, less unnecessary traveler delay more walking, biking, transit and carpool trips, reduction in vehicle miles traveled and an improved traveler experience, which benefits all modes of travel.</p> <p>In other words, through the use of various high technology components, improvements in the management and use of the regional transportation system can occur to help motorists, commuters, and pedestrian/bicyclists.</p> <ul style="list-style-type: none"> • Proposed improvements: PORTAL provides the collection, analysis, management, and interpretation of the ITS data. The program is an on-going annual effort to help us better manage the regional transportation system. PORTAL is managed by Portland State University. The project Source: New project. • Funding: The awarded source of funding for the project is from Metro’s 2019-2021 Regional Flexible Fund Allocation (RFFA) - Step 1 funding bucket. • Project Type: Planning • Location: Region 1 • Cross Street Limits: N/A • Overall Mile Post Limits: N/A • Current Status Code: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc. • STIP Amendment Number: TBD • MTIP Amendment Number: JL20-14-JUL
<p>What is changing?</p>	<p>AMENDMENT ACTION: ADD NEW PROJECT</p> <p>The formal amendment add this multi-year funding for the PORTAL requirements supporting the Metro Regional TSMO/ITS program needs. A description of the scope activities includes the following:</p> <ul style="list-style-type: none"> • Maintain data feeds, handle any changes to data feeds, outages. Internal system patches, network upgrades, etc. Maintain backup and storage of data archive. Code maintenance and upgrades as necessary. • Provide training or workshop opportunities open to PORTAL users, planners, researchers, and students; provide regular updates on PORTAL to TransPort and via the documentation website. Includes the Portal User Group which meets monthly. • Propose and develop enhancements which are determined on an annual basis by the PORTAL TAC and TransPort. Examples include providing standardized data sets, updating the travel time page to connect freeways and arterials, adding an API and expanding coverage of data collection to additional roadways in the region as new detection is put in place.

	<ul style="list-style-type: none"> Disseminate results of this project through conference presentations, papers, and digital communication, including conferences such as the Transportation Research Board, the North American Traffic Monitoring Exposition and Conference (NATMEC), ITS America, Regional ITE and IMSA Conferences, the Northwest Transportation Conference. Provide Quarterly progress reports and a final report at the project’s conclusion; quarterly progress briefings to TAC; monthly updates to TransPort.
<p>Additional Details:</p>	<p>The PORTAL project will cover the entire Region 1 area.</p> <div style="display: flex; justify-content: space-between; align-items: center;">  <div style="text-align: right;"> <p>600 NE Grand Ave. Portland, OR 97232-2736 oregonmetro.gov</p> </div> </div> <p style="text-align: center;">June 9, 2020</p> <p>Caleb Winter Metro 600 NE Grand Ave. Portland, OR 97232</p> <p>Dear Kristin,</p> <p>Congratulations, your agency’s proposal to the 2019 Transportation System Management and Operations Solicitation was awarded funds. The proposed project, Multimodal Transportation Data Archive, was awarded funds by a recommendation at TransPort December 11, 2019 and TPAC was informed of that recommendation January 2, 2020.</p> <p>The award is a suballocation from the Metro’s Regional Flexible Funds for the TSMO Program for years 2019-2021:</p> <p style="margin-left: 40px;">\$600,000 Federal (FAST Act STBG) \$68,672 local funding is required to match, proposed to be broken down between ODOT and PSU: \$11,145 ODOT \$57,527 PSU TREC \$668,672 is the total project amount</p> <p>The project manager and lead agency for this project is Kristin Tuft, Portland State University (PSU). Please let us know immediately if you have any updates on project manager or lead agency.</p> <p>Completed steps:</p> <ul style="list-style-type: none"> ✓ Scheduling a project kick-off meeting in spring 2020; communicate your team’s availability within two weeks to Caleb Winter, caleb.winter@oregonmetro.gov ✓ Confirming ODOT administrative liaison will be Chi Mai, supported by Kerrie Franey. ✓ Reviewing scope, schedule and budget from the application and incorporating subsequent adjustments.
<p>Why a Formal amendment is required?</p>	<p>Per the FHWA/FTA/ODOT/MPO approved Amendment Matrix, adding a new project to the MTIP requires a formal amendment.</p>
<p>Total Programmed Amount:</p>	<p>The programming for the scoping effort totals \$668,672.</p>
<p>Added Notes:</p>	

Note: The Amendment Matrix located below is included as a reference for the rules and justifications governing Formal Amendments and Administrative Modifications to the MTIP that the MPOs and ODOT must follow.

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. The programming factors include:

- Verification as required to programmed in the MTIP:
 - Awarded federal funds and is considered a transportation project
 - Identified as a regionally significant project.
 - Identified on and impacts Metro transportation modeling networks.
 - Requires any sort of federal approvals which the MTIP is involved.
- Passes fiscal constraint verification:
 - Project eligibility for the use of the funds
 - Proof and verification of funding commitment
 - Requires the MPO to establish a documented process proving MTIP programming does not exceed the allocated funding for each year of the four year MTIP and for all funds identified in the MTIP.
- Passes the RTP consistency review:
 - Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
 - RTP project cost consistent with requested programming amount in the MTIP
 - If a capacity enhancing project – is identified in the approved Metro modeling network
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP.
- If not directly identified in the RTP’s constrained project list, the project is verified to be part of the MPO’s annual Unified Planning Work Program (UPWP) if federally funded and a

ODOT-FTA-FHWA Amendment Matrix	
Type of Change	
FULL AMENDMENTS	
1.	Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized
2.	Major change in project scope. Major scope change includes: <ul style="list-style-type: none"> • Change in project termini - greater than .25 mile in any direction • Changes to the approved environmental footprint • Impacts to AQ conformity • Adding capacity per FHWA Standards • Adding or deleting worktype
3.	Changes in Fiscal Constraint by the following criteria: <ul style="list-style-type: none"> • FHWA project cost increase/decrease: <ul style="list-style-type: none"> • Projects under \$500K – increase/decrease over 50% • Projects \$500K to \$1M – increase/decrease over 30% • Projects \$1M and over – increase/decrease over 20% • All FTA project changes – increase/decrease over 30%
4.	Adding an emergency relief permanent repair project that involves substantial change in function and location.
ADMINISTRATIVE/TECHNICAL ADJUSTMENTS	
1.	Advancing or Slipping an approved project/phase within the current STIP (If slipping outside current STIP, see Full Amendments #2)
2.	Adding or deleting any phase (except CN) of an approved project below Full Amendment #3
3.	Combining two or more approved projects into one or splitting an approved project into two or more, or splitting part of an approved project to a new one.
4.	Splitting a new project out of an approved program-specific pool of funds (but not reserves for future projects) or adding funds to an existing project from a bucket or reserve if the project was selected through a specific process (i.e. ARTS, Local Bridge...)
5.	Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data.
6.	Changing name of project due to change in scope, combining or splitting of projects, or to better conform to naming convention. (For major change in scope, see Full Amendments #2)
7.	Adding a temporary emergency repair and relief project that does not involve substantial change in function and location.

regionally significant planning study that addresses RTP goals and strategies and/or will contribute or impact RTP performance measure targets.

- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
 - Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
 - Adheres to conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP.
 - Is eligible for special programming exceptions periodically negotiated with USDOT as well.
 - Programming determined to be reasonable of phase obligation timing and is consistent with project delivery schedule timing.
- Reviewed and initially assessed for Performance Measurement impacts to include:
 - Safety
 - Asset Management - Pavement
 - Asset Management – Bridge
 - National Highway System Performance Targets
 - Freight Movement: On Interstate System
 - Congestion Mitigation Air Quality (CMAQ) impacts
 - Transit Asset Management impacts
 - RTP Priority Investment Areas support
 - Climate Change/Greenhouse Gas reduction impacts
 - Congestion Mitigation Reduction impacts
- MPO responsibilities completion:
 - Completion of the required 30 day Public Notification period:
 - Project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.
 - Acting on behalf of USDOT to provide the required forum and complete necessary discussions of proposed transportation improvements/strategies throughout the MPO.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the July 2020 Formal MTIP amendment (JL20-14-JUL) will include the following:

<u>Action</u>	<u>Target Date</u>
• Initiate the required 30-day public notification process.....	June 30, 2020
• TPAC notification and approval recommendation.....	July 10, 2020
• JPACT approval and recommendation to Council.....	July 16, 2020
• Completion of Public Notification Process.....	July 29, 2020
• Metro Council approval.....	July 30, 2020

Notes:

* If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

USDOT Approval Steps:

<u>Action</u>	<u>Target Date</u>
• Amendment bundle submission to ODOT for review.....	August 4, 2020
• Submission of the final amendment package to USDOT	August 4, 2020
• ODOT clarification and approval.....	August 21, 2020
• USDOT clarification and final amendment approval.....	August 21, 2020

Note: The above assumes a July 30, 2020 for Metro Council Approval

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:** Amends the 2018-2021 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 17-4817 on July 27, 2017 (For The Purpose of Adopting the Metropolitan Transportation Improvement Program for the Portland Metropolitan Area).
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 20-5116 consisting of two projects in the July 2020 Formal Amendment Bundle enabling the projects to be amended correctly into the 2018 MTIP with final approval to occur from USDOT.

Attachments: None

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: July 9, 2020
To: Transportation Policy Alternatives Committee (TPAC) and interested parties
From: John Mermin, Senior Regional Planner
Subject: 2020-21 Unified Planning Work Program (UPWP) Amendment for the ODOT – Pedestrian & Bicycle Crossing: Oregon City to West Linn study

Background

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. The UPWP is developed by Metro with input from local governments, TriMet, ODOT, FHWA, and FTA. It includes all planning projects that will be receiving federal funds for the upcoming fiscal year.

Please see attached project narrative proposed to be amended into the 2020-21 UPWP. ODOT staff will provide a brief presentation about the project at the July 10 TPAC meeting.

Metro staff will provide a Resolution and Staff report and request action on the amendment at the August 7 TPAC meeting and by consent at the September 17 JPACT and Metro Council meetings.

Please contact John.Mermin@oregonmetro.gov for inquiries about the UPWP. For information about the project please contact Kristen.Stallman@odot.state.or.us.

ODOT – Pedestrian & Bicycle Crossing: Oregon City to West Linn

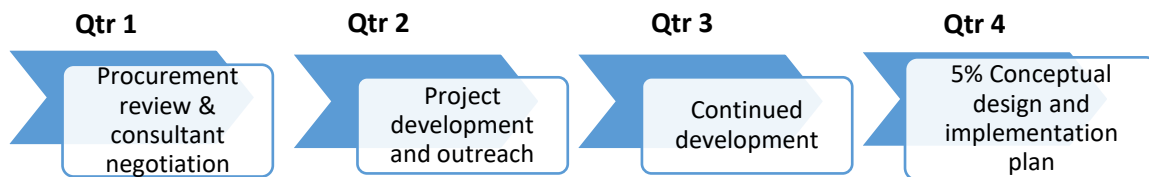
Staff Contact: Kristen Stallman, Kristen.Stallman@odot.state.or.us

Description

ODOT Region 1 is initiating a planning effort with agency partners to assess the need for a pedestrian and bicycle crossing over the Willamette River connecting Oregon City, and West Linn and to identify a preferred crossing location. This planning effort supports community desires to connect the regional active transportation network in this area. The existing Arch Bridge (OR 43) does not adequately serve bicycle and pedestrian connectivity within the vicinity. The planned I-205 Abernethy bridge will not allow bicycle and pedestrian use. Further, agency partners are interested in identifying a new option for a low stress connection between the two cities. ODOT, with partner agencies has initiated this planning study in pursuit of providing bicycle and pedestrian travel options between Oregon City and West Linn. The work will rely on ODOT’s *I-205: Stafford Road to OR 99E (Abernethy Bridge) Bicycle and Pedestrian Assessment (2016)* and existing local and regional plans, to the greatest extent possible. Today, no existing local or regional plans call for the construction of a new pedestrian and bicycle crossing of the Willamette River between Oregon City and West Linn. There are planned facilities at various stages of development (planned but unfunded, designed but unfunded, funded awaiting construction) within the identified study area on each side of the river. Verifying the need and preferred crossing location for a bike and pedestrian crossing will require local agency partnership and community involvement.

ODOT’s planning effort aligns with efforts by regional partners to reimagine access to the Willamette River in Oregon City and West Linn. A new pedestrian and bicycle crossing will enhance access for people walking and biking and provide the region opportunities to reconnect with the river and identify a key missing connection in the regional bikeway and pedestrian system. Completing the active transportation network with a river crossing creates essential access to and along the Willamette River between Gladstone, Oregon City, and West Linn.

Key Project Deliverables / Milestones



FY 2020-21 Cost and Funding Sources

Requirements:

Resources:

FY 2020-21 Unified Planning Work Program

Personal Services	\$ 50,000	Federal	\$ 50000
Materials & Services	\$ 300,00,000	Federal	\$ 300000
TOTAL	\$ 350,000	TOTAL	\$ 350,000

MEMORANDUM

TO: C4 Metro Subcommittee

FROM: Martha Fritzie, Principal Planner; DTD Planning & Zoning Division
Chris Storey, Assistant Director; Water Environment Services (WES)

DATE: July 9, 2020

SUBJECT: Overview of the HB2001/2003 Rulemaking (Middle Housing)

House Bill 2001 (HB2001) and HB 2003 (HB2003)

HB2001: Applies to cities with populations over 10,000 people throughout the state, as well as cities and counties with a population over 1,000 in the Portland Metro urban growth boundary. Under the bill, by June 30, 2021, Oregon’s medium-sized cities (10,000 – 25,000 population) must allow duplexes in areas zoned for detached single-family dwellings. By June 30, 2022, cities and counties in the Portland Metro region and Oregon’s other largest cities (over 25,000 population), must allow a duplex on any urban lot zoned for a detached single-family home, and must allow triplexes, quadplexes, cottage clusters and townhouses in urban “areas” zoned for a detached single-family home.

HB2001 also allows local governments to request a time extension for the application of middle housing provisions in areas with infrastructure constraints (water, sewer, storm water, or transportation) that would not allow further middle housing development.

HB2003: Includes a new requirement for cities to adopt Housing Production Strategies (HPS). While Clackamas County does not have an obligation to complete a HPS; most of the county’s incorporated cities will need to complete one.

Rulemaking Advisory Committee (RAC) and Technical Advisory Committees (TAC)

In response to HB2001 and HB2003, the Land Conservation and Development Commission (LCDC) initiated rulemaking to begin implementation of the 'middle housing' and HPS requirements. To advise on this rulemaking, the commission directed DLCD to establish a Rulemaking Advisory Committee (RAC). Clackamas County has two staff participating in the RAC: Chris Storey (Asst. Director WES) is a participating member on behalf of both the County and the Special Districts Association of Oregon, and Martha Fritzie (Principal Planner, DTD Planning) is an alternate. Milwaukie City Councilor Angel Falconer is also an alternate RAC member.

Advising the RAC are three subcommittees, each serving as a Technical Advisory Committee (TAC) for a portion of the overall rulemaking:

1. HB2001 Model Code (MC) TAC: Martha Fritzie is a participating member
2. Infrastructure-Based Time Extension Requests (IBTER) TAC: Chris Storey is a participating member, as is West Linn Assistant City Manager John Williams.

3. HB2003 Housing Production Strategies TAC: The County has no participating member.

To date, there have been seven (7) RAC meetings; six (6) IBTER TAC meetings; and seven (7) MC TAC meeting.

The Model Code (MC) TAC has been tasked with providing direction on two separate components:

- A Model Code, which is actual code language that could be directly applied to a jurisdiction, should it choose to do so, or if a jurisdiction chooses to take no action, the Model Code will automatically be applied on the deadline provided in HB2001 (June 30, 2021 for “Medium Cities” and June 30, 2022 for “Large and Metro Cities”).
- Oregon Administrative Rules (OARs) that provide the “minimum compliance” regulations for those jurisdictions that choose not to adopt the Model Code, but may use the Model Code as guidance in the creation of their own regulations to comply with HB2001. County Planning staff and staff of many of the cities in the county are expecting to establish regulations in this manner and, as such, should be concerned with the identified “minimum compliance” regulations than the Model Code itself.

The “Medium Cities” model code and associated OARs have been drafted and are scheduled for adoption by the Land Conservation and Development Commission (LCDC) at a public hearing during their July 23rd-24th session. These rules would provide the regulations for allowing a duplex on any urban lot zoned for a single-family home in the “Medium Cities”; however, we expect that these same rules will be incorporated into the “Large and Metro Cities” model code and associated OARs.

The process for receiving a delay in the adoption of the zoning changes will be laid out in the Infrastructure Based Time Extension Rule, or “IBTER.”

- The IBTER process is a voluntary decision by a local jurisdiction with planning authority to request a delay in up zoning single family residential in a particular area as required to allow the middle housing element set forth in the statute. The county, as the land use planning authority, could elect to pursue an IBTER by filing an application by June 30, 2021. Such a request would need to be done in close coordination with an area’s utility service provider.
- The IBTER application will be based on a set of rules that are still in the process of being developed. A key theme running through them is that the infrastructure impact that would justify a time extension cannot be a pre-existing condition that is acceptable for single family housing. It must manifest due to the increased demand on that infrastructure due to the increased density of housing by December 31, 2023.
- There are proposed baselines for the rate of growth than can be assumed regarding the infrastructure impact, and the application must include a proposed plan on how to remedy that deficiency. The application is discretionary, and can be rejected by the LCDC.

Expected Adoption Schedule (LCDC)

- **July 23-24, 2020:** Final adoption of “Medium Cities” Model Code and OARs, and first reading of the IBTER rules.
- **August 5, 2020:** Special meeting of LCDC for second reading and adoption of the IBTER rules.
- **September 24-25, 2020:** First reading for “Large and Metro Cities” Model Code and OARs; first reading of Housing Production Strategy rules.
- **November 12-13, 2020:** Second reading and adoption of “Large and Metro Cities” Model Code and OARs; second reading and adoption of Housing Production Strategy rules.

Several more RAC and TAC meetings have been scheduled through the summer months to review drafts prior to the LCDC adoption hearings.

Issues

Some of the issues that are most significant and/or likely to be of concern at this point follow:

1. **Flexibility.** Throughout the rulemaking there has been a struggle with allowing local jurisdictions flexibility while still meeting the intent of the legislation, which is, generally, to provide for more housing in traditionally single-family only neighborhoods. While Staff can understand and appreciate this struggle, so far DLCD seems to be erring on the side of less, rather than more, flexibility out of concern that there may be jurisdictions that would take advantage of the flexibility to find a way to not provide for more equitable housing opportunities in some of the more “exclusive” single-family neighborhoods.

County staff, and staff of other jurisdictions involved in the rulemaking, have been consistently asking for the minimum compliance provisions to allow cities and counties more flexibility so long as their approaches comply with HB 2001. The need for flexibility has been requested so jurisdictions can consider local context when developing zoning provisions, and so they can work with their community members to consider alternatives in order to find the best approach to provide more housing choice for current and future community members.

2. **Parking.** Throughout all the meetings, some of the liveliest discussions have been around parking and transportation; in fact, all three work groups have struggled with how to deal with transportation and parking in their various focus areas.
 - **Model Code:** The amount of off-street parking that should be required has been a controversial issue in the Model Code work. Despite a fair amount of push-back from both RAC and TAC members, DLCD has proposed the following parking requirements:

“Middle Housing” Type	Model Code (as currently drafted)	Minimum Compliance (as currently drafted in OARs or as discussed in RAC)
Duplexes	No off-street parking spaces required	A jurisdiction may not <u>require</u> more than 2 off-street space per duplex (or 1 per unit). *This does not mean that a jurisdiction could not allow a developer to build a duplex with more than 2 spaces, just that it cannot require the developer to do so.
Triplexes/ Quadplexes	Considering options ranging from 0 to 1 off-street parking spaces required for a triplex and 0 to 2 spaces for a quadplex (not per unit)	A jurisdiction may not <u>require</u> more than 1 off-street space per unit in a triplex or quadplex. *Again, this does not mean that a jurisdiction could not allow a developer to build a plex with more off-street spaces, just that it cannot require the developer to do so.
Townhomes and cottage clusters	TBD	TBD

In general, there is concern among the local jurisdictions that the Model Code parking requirements do not currently reflect or support the context and needs of communities throughout the state, particularly in those communities that have limited transit and longer commutes or that have a large number of college students in roommate situations.

With regard to the more dense “middle housing” types, however, county staff does have significant concerns. Having an off-street parking ratio of 1 space per unit may be problematic in areas with limited on-street parking to accommodate households with multiple cars and/or visitors. As we think about appropriate minimum parking requirements it is important to balance these needs with the fact that providing more parking can drive up housing costs.

- IBTER: There has been general agreement that water and wastewater are unlikely to be reasons for delaying up zoning given that the systems are designed for peak service demand and surface water impacts are reviewed on a site- and development-specific basis. However, a lack of off-street parking requirements for new dwelling units and the increased impact of vehicular traffic could overwhelm local transportation systems and justify an extension. There was robust discussion regarding the assumptions on the amount of the parking required, and how to evaluate the difference between the

impacts of land use requirements and development requirements that manifest as part of the development review process, etc. This standard was ultimately recognized as the one requiring the most local flexibility and least state mandates.

3. ***“In areas.”*** With respect to the “Large and Metro Cities” rulemaking, this is, by far, the most controversial and difficult topic to address. Because HB2001 specifically (and presumably intentionally) states that duplexes must be allowed on every lot zoned for a single-family dwelling but that the other middle housing types (triplexes, quadplexes, etc) must be allowed “in areas” zoned for a single-family dwelling, the issue becomes how a jurisdiction would and should define the “areas” where these types of housing will be allowed.

The RAC and TACs have just recently begun the conversation about “areas” and DLCD has proposed the following two methods as options for consideration:

- The “whittle down” method starts with an assumption that all the middle housing types are allowed in all residential areas zoned for single-family dwellings and then eliminates areas from eligibility if they are not “well-suited” for middle housing development. As currently drafted, the only justifications for “whittling down” the areas are based on specific wildlife habitat and other already-protected areas or areas with infrastructure deficiencies that cannot be remedied. DLCD staff has noted that under this approach, there will be additional opportunities (this language has not been drafted yet) to designate other areas to be “whittled away”, as long as there is “robust justification” for restricting middle housing types in those areas. At this point, we are uncertain what sort of “robust justification” would be required and, absent a realistic opportunity to further “whittle areas” to those that are most appropriate to allow middle housing, this method may not meet the intent of HB2001, which clearly implies that not all single-family lots are appropriate for all the middle housing types.
- The “balloon” method would determine areas that are well-suited for middle housing development, considering locational factors such as proximity to centers and services, other more dense housing development, transit lines/stations or certain classifications of roads. This method would likely result in a more limited set of “areas” in which the other middle housing types must be allowed, which raises some equity concerns, as it is clear that the intent of HB2001 is to provide more housing choice in historically exclusive residential areas.

It is pretty clear from the documents produced by DLCD and conversations at the most recent RAC meeting, that DLCD’s preference is the “whittle down” method. This was primarily motivated by a conversation that looked at the approaches through an equity lens, and the observation from a RAC member that prior city-specific efforts using the balloon method were not successful in increasing middle housing. It is of particular importance that there is flexibility with whatever method ends up being used to define “areas,” but the ability of a jurisdiction to define these areas in their own code amendments will be limited by what is ultimately adopted by LCDC.

4. ***IBTER and the adoption timeline.***

The IBTER process will conclude in the next 60 days and is intended to capture unique impacts from up-zoning and not more general infrastructure issues. The remaining opportunity for changes to the draft rules is limited, as the adoption timeline is nearing completion, and the statute does not grant much space for the proposed rules to be other than what is being proposed.

The question of whether to file an IBTER application is likely to be difficult because the County is charged with making the decision to file for the urban unincorporated area, but is not the infrastructure provider for a significant portion of it; Oak Lodge Water Services is responsible for water, wastewater and surface water in that jurisdiction, and there are several other water providers. Once the rules are codified, it will be useful for the utility service providers in that area to provide a written report to the County if they foresee an infrastructure challenge during the relevant time horizon.