
Wednesday, July 14, 2021

7:30 AM – 9:00 AM

Virtual Meeting:

<https://clackamascounty.zoom.us/j/83527489430?pwd=VzU3dnhleXd1S01qc1NCeHNRYUEzZz09>

Telephone option: 1 (408) 638-0968

Agenda

7:30 a.m. Welcome & Introductions

7:35 a.m. JPACT Issues

- *MTIP Amendment re Programming HB 3055 Funding for I-205*
Presenting: Mandy Putney, ODOT I-205 Project Director; Brendan Finn, ODOT Urban Mobility Office Director
- JPACT Work Program and TPAC Update
 - *Update from TPAC Staff*
- *Regional Congestion Pricing Study – Policy Recommendations*
Introducing: TPAC Staff
- Regional Flexible Funds Allocation (RFFA) 2025-2027, Final Program Direction
Presenting: TPAC Staff

8:30 a.m. MPAC Issues

- MPAC June Meeting Debrief and Work Program
Introducing: MPAC Members and MTAC Staff
June meeting topics were:
 - *Barriers to Affordable Housing Panel*
 - *Port of Portland Seismic Resilient Runway Discussion*

9:00 a.m. Adjourn

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|---------------------|---|---------|
| Attachments: | JPACT/MPAC Work Program | Page 02 |
| | I-205 MTIP Amendment Presentation | Page 06 |
| | TPAC Memo Regional Congestion Pricing Study | Page 24 |
| | RFFA Program Direction Materials | Page 35 |

2021 JPACT Work Program

As of 6/8/21

Items in italics are tentative

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| | <p><u>June 17, 2021</u></p> <ul style="list-style-type: none"> • Resolution No. 21-5182, For the Purpose of Amending the 2021-24 Metropolitan Transportation Improvement Program (MTIP) to Complete the Reprogramming of Unified Planning Work Program (UPWP) Annual Program Estimates Impacting Metro, Plus Amend, Add, or Cancel Several Projects Impacting ODOT and Trimet to Address their Next Federal Approval Step (JN21-11-JUN) (consent) • Regional Mobility Policy Update – Introduce draft urban mobility definition and potential measures to test (20 min, Kim Ellis) • Regional Congestion Pricing Study Discussion (30 min, Elizabeth Mros-O’Hara) • TSMO Strategy – Vision and Goals (10 min, Caleb Winter) |
| <p><u>July 15, 2021</u></p> <ul style="list-style-type: none"> • Congestion Pricing-FINAL REPORT & ACTION (Elizabeth Mros-O’Hara, 30 min) • Final program direction for RFFA 2025-27 – ACTION (30 min, Daniel Kaempff) | <p><u>August 19, 2021</u></p> <ul style="list-style-type: none"> • <i>Safe Routes to School – update (20, Noel Mickelberry)</i> • <i>Progress on our Regional Traffic Safety goals – update (20 min. Lake McTighe)</i> • <i>Active Transportation Return on Investment Study (20 min, John Mermin)</i> |
| <p><u>September 16, 2021</u></p> <ul style="list-style-type: none"> • Regional Mobility Policy Update – Introduce Case Study Findings and Recommendations – (40 min, Kim Ellis and ODOT staff) | <p><u>October 21, 2021</u></p> <ul style="list-style-type: none"> • Emerging Transportation Trends – update (20 min., Eliot Rose) |

| | |
|--|---|
| | <ul style="list-style-type: none"> • Freight Commodity Study – (30 min, Tim Collins) • 2023 Regional Transportation Plan Update Work Plan – Kick-off Scoping Phase (30 min, Kim Ellis) |
| <p><u>November 18, 2021</u></p> <ul style="list-style-type: none"> • RFFA 2025-27 Program Direction – final policy framework; call for projects (30 min, Daniel Kaempff) | <p><u>December 16, 2021</u></p> <ul style="list-style-type: none"> • Regional Mobility Policy Update – Recommendations for 2023 RTP Update Work Plan and to the OTC - ACTION (30 min., Kim Ellis and ODOT staff) • 2023 Regional Transportation Plan Update Work Plan – ACTION (30 min, Kim Ellis) • <i>Progress on our Regional Traffic Safety goals – update (20 min. Lake McTighe)</i> |

Parking Lot:

- *Hwy 26/Westside Transportation Study – briefing (20 min, Matt Bihn & ODOT)*
- *TV Highway Corridor Study – briefing (30 min, Eryn Kehe)*
Enhanced Transit Corridor (20 min, Matt Bihn)

2021 MPAC Work Program

As of 6/16/2021

Items in italics are tentative

| | |
|---|---|
| | <p><u>June 23, 2021</u></p> <ul style="list-style-type: none"> • Port of Portland Seismic Resilient Runway Discussion (Elizabeth Kennedy-Wong, 20 min) • Breaking Down Barriers to Affordable Housing Panel (Various Panelists; 80 min) <ul style="list-style-type: none"> ○ Housing Authority of Clackamas County ○ Bienestar ○ Hacienda CDC ○ Reach CDC ○ Marnella Homes |
| <p><u>July 28, 2021</u></p> <ul style="list-style-type: none"> • Housing Bond Update (45 min, Metro; Emily Lieb) • Supportive Housing Services Update (Patricia Rojas, 45 min) • Legislative Update (Randy or Anneliese, Metro; 10 min) | <p><u>August 25, 2021- Cancelled</u></p> <p style="text-align: center;"><i>Metro Council on Recess</i></p> |
| <p><u>September 22, 2021</u></p> <ul style="list-style-type: none"> • Housing Needs Analysis Discussion (Mayor Callaway, Sean Edging (15 min presentation)) • Regional Mobility Policy Update (Kim Ellis, Metro; 40) | <p><u>October 27, 2021</u></p> <ul style="list-style-type: none"> • Metro code updates to facilitate city and county compliance with HB 2001 Middle Housing requirements (Tim O'Brien or Ted Reid, Metro) • 2040 Planning and Development grantee highlights (TBD grant recipients) |
| <ul style="list-style-type: none"> • <u>November 24, 2021- Cancelled</u> | <p><u>December 8, 2021</u></p> |

Parking Lot:

- Housing/SHS progress report
 - Regional affordable housing implementation (share/brainstorm/discussion)
 - Housing Panel counties and cities



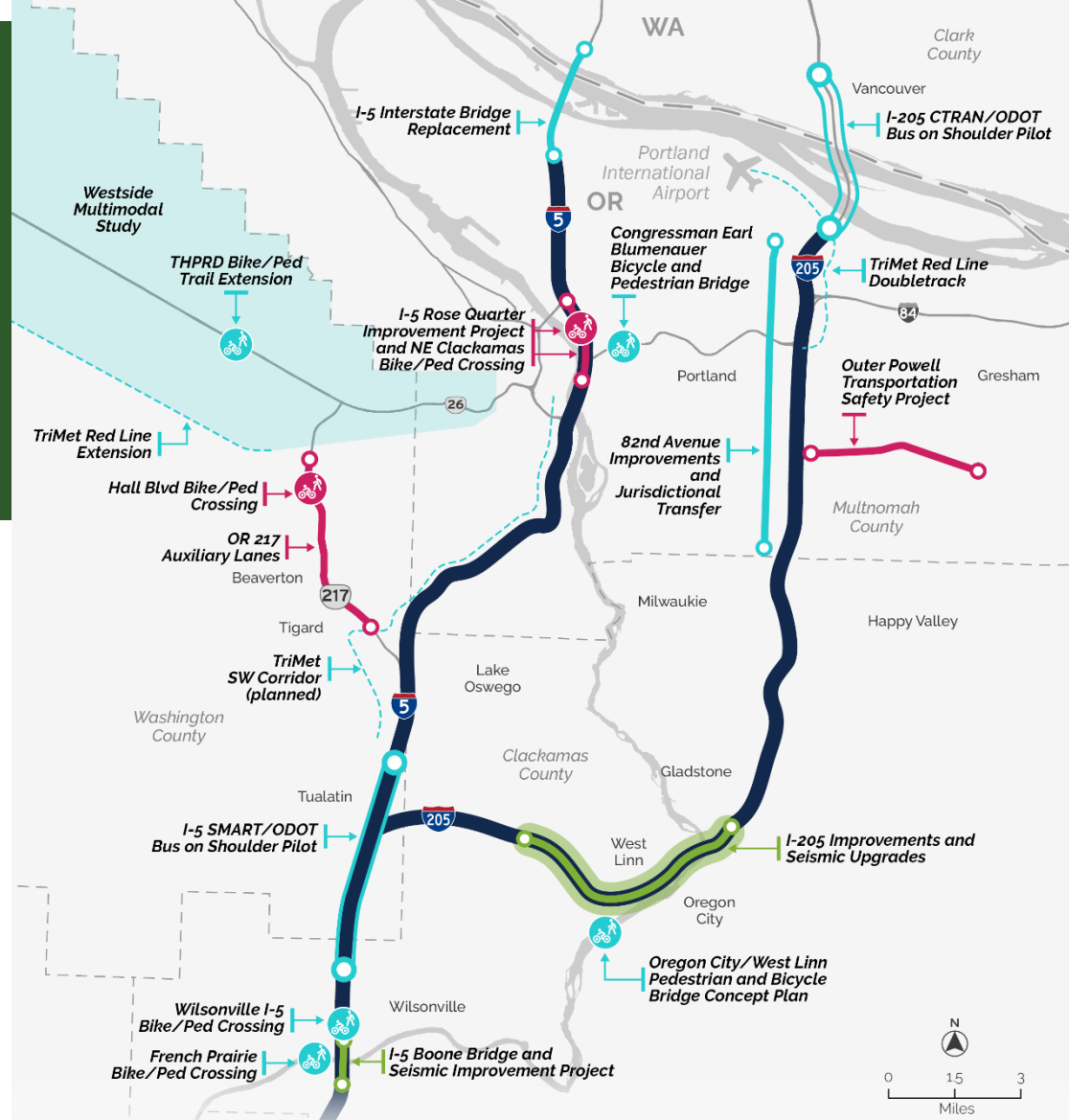
600 NE Grand Ave.
Portland, OR 97232-2736
oregonmetro.gov

- New transfers station sites
 - Larger conversation of regional solid waste
- Engagement during a pandemic
- Parks bond progress report
- Expo Development Opportunity Study and regional venues
- Employment land
- Census – likely for December
- Transportation funding
- Growth Trends (Ted will schedule)

I-205 Improvements Project Stafford Road to OR 213



Comprehensive Congestion Management and Mobility Plan



Comprehensive Congestion Management and Mobility Projects Map

Currently Funded by HB2017

- System Improvement Project
- Bike/Ped Crossing Project


Made Possible with HB3055


- System Improvement Project
- Regional Mobility Pricing Project
- I-205 Toll Project


Partner Project with ODOT Support

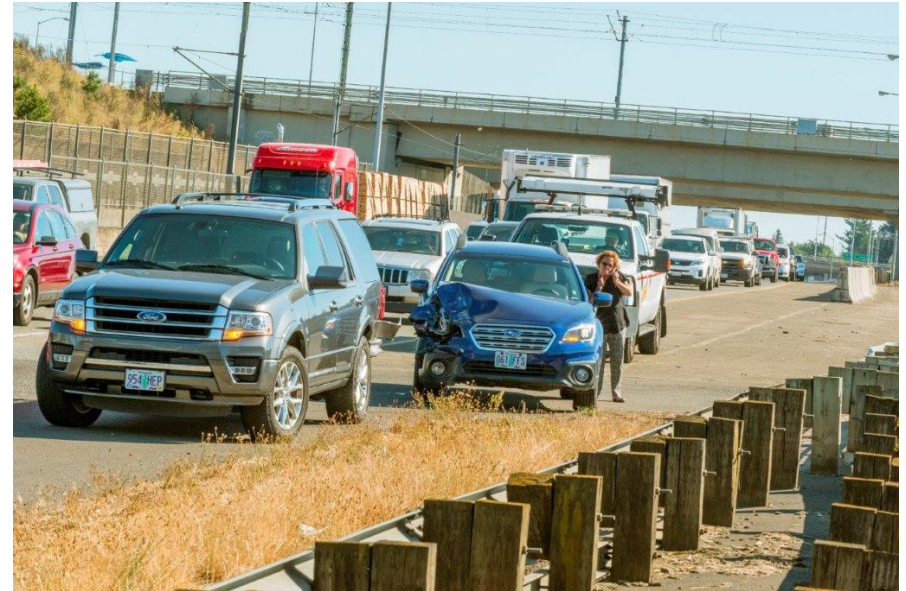
- System Improvement Project
- Bike/Ped Crossing Project
- Bus on Shoulder Pilot
- TriMet Project
- Multimodal Study

Project Need

6³/₄ 
HOURS
CONGESTION
PER DAY

896 
CRASHES IN
THIS CORRIDOR
2014-2018

\$10.9 
MILLION **COST OF INJURIES,**
PROPERTY DAMAGE,
DELAY AND FUEL CONSUMED
FROM CRASHES PER YEAR



Project Benefits

Improving our economy – reliable, safer, earthquake-ready travel on I-205.



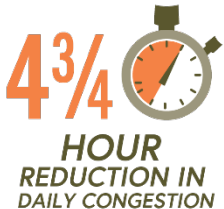
Earthquake-Ready Bridges

- Strengthened Abernethy Bridge and 8 other bridges will improve our region's ability to recover quickly after a major earthquake.



Fewer Crashes

- Improved interchanges and on- and off-ramps will make travel safer, resulting in fewer crashes.



Reduced Congestion and Travel Times

- Additional travel lane in each direction will make travel faster and more predictable.

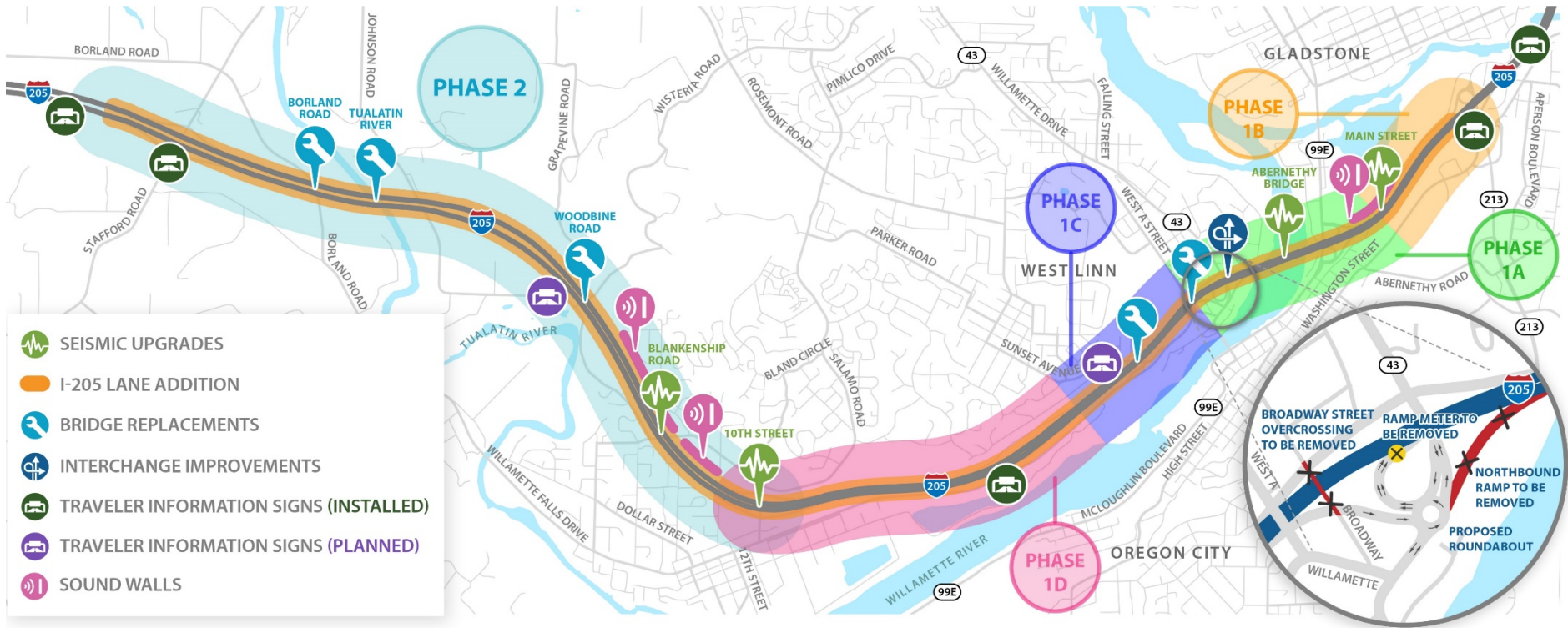
Phased Project Delivery

Phase 2: 10th Street – Stafford

Phase 1: OR213 – 10th Street



Project Improvements



Phase 1A - West Linn



PHASE 1A IMPROVEMENTS MAP

- 1 Construct final configuration of Willamette Falls Drive/OR 43 intersection.
- 2 Construct final configuration of Willamette Falls Drive/Broadway intersection.
- 3 End roadwork at West A Bridge. *Bridge work in Phase 1C.*
- 4 Temporary mainline widening and temporary ramp alignment for the duration of construction.
- 5 Remove third southbound lane south of Abernethy Bridge.
- 6 Construct final configuration of OR 43 roundabout, northbound entrance and southbound exit ramp.
- 7 Construct final configuration of OR 43 southbound intersection.
- 8 Maintain existing two-lane configuration northbound with additional entrance to exit auxiliary lanes on the Abernethy Bridge.

Phase 1A – Abernethy Bridge + Oregon City



9 Seismically retrofit and widen Abernethy Bridge to carry three lanes and auxiliary lanes between interchanges.

11 Construct wall at Main Street.

13 Begin roadwork at Main Street Bridge. Bridge work in Phase 1B.

15 Re-stripe southbound lanes from two lanes plus an auxiliary lane to three lanes between OR 213 entrance and OR 99E exit. Install rumble strips.

10 Construct final configuration of OR 99E southbound and northbound ramp intersection, OR 99E entrance ramp and Clackamette Drive walls.

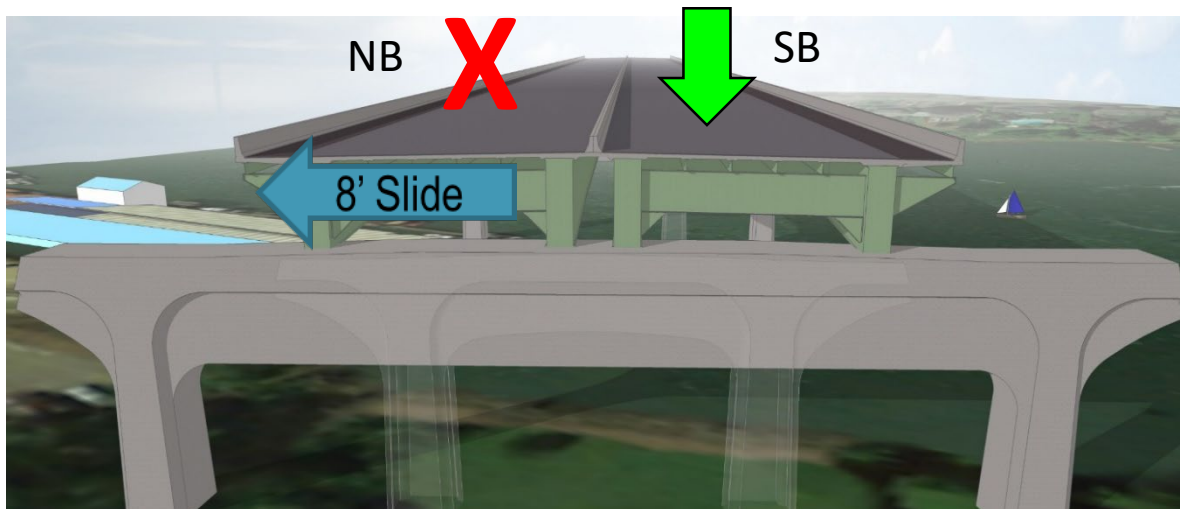
12 Construct half of the configuration of northbound entrance ramp. Final configuration dependent on Main Street Bridge work in Phase 1B.

14 Construct sound wall. There is no southbound roadway widening in Phase 1A.

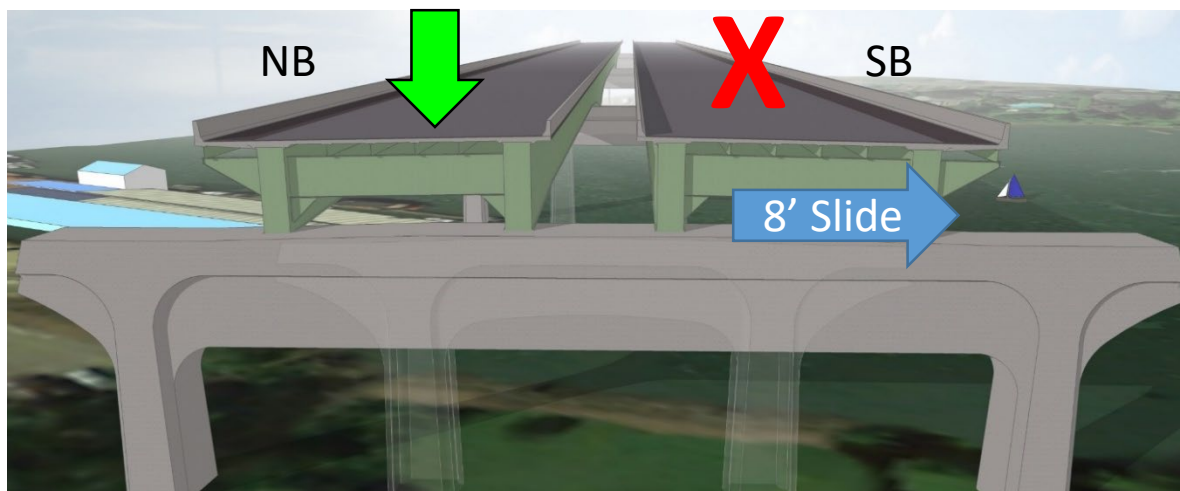
16 Sign bridge for new southbound traffic configuration.

Phase 1A - Abernethy Bridge Construction

1: Widen each side and slide one direction

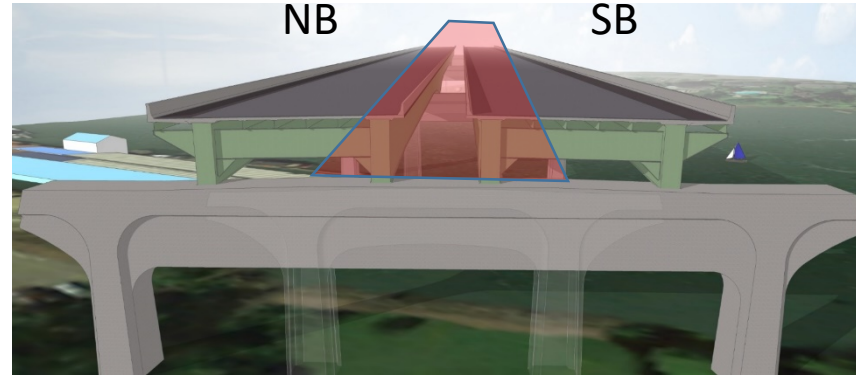


2: Slide the other direction



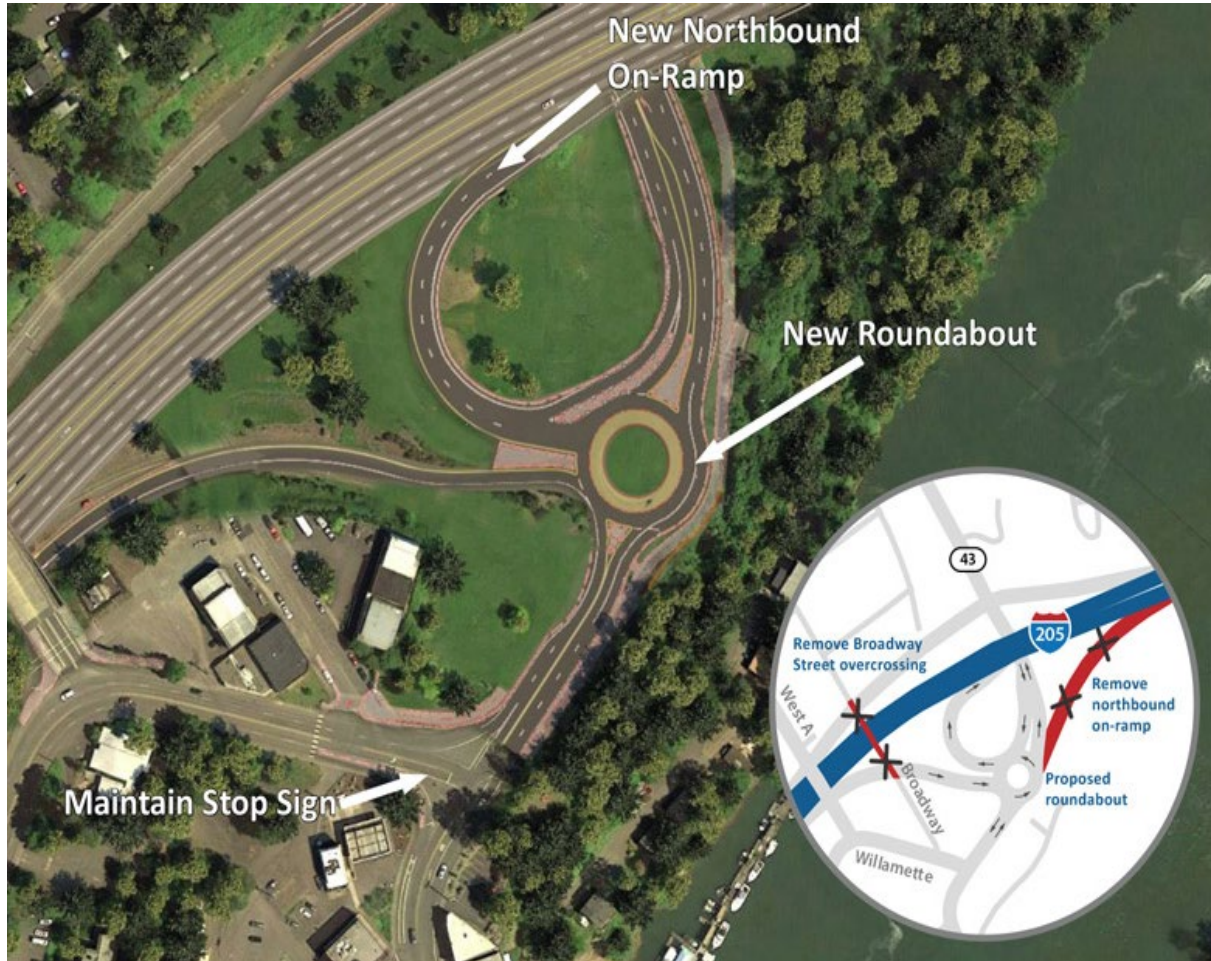
Abernethy Bridge Construction Staging

3: Construct the interior section



The new Abernethy Bridge, shown here with new strengthened columns, will be able to withstand a major earthquake

Interchange Improvements



OR 43

- New roundabout
- New multi-use path along OR 43 to Willamette Falls Drive
- New rapid flashing beacon and crosswalk across OR 43 to Willamette Falls Drive and West A Street

OR 99E

- Realigning/widening on- and off-ramps
- New multi-use path
- Two new sidewalks

Active Transportation Improvements

IMPROVEMENTS FOR PEOPLE WHO WALK AND BIKE

New ADA curb ramps in project area.

New, wider Sunset Avenue overcrossing will include a 6-foot shoulder and an 8-foot sidewalk in each direction.

New, wider West A Street overcrossing will include:

- 6-foot shoulder/bike lane in each direction
- 7-foot curb and sidewalk in each direction
- 8-foot parking strip on one side of the street.

OR 99E/Clackamette Drive will include the following new facilities:

- A multi-use path
- A 6-foot sidewalk connection with new crossing on Clackamette Drive
- An 8-foot sidewalk connection between ramp terminals on OR 99E

Main Street will include a new 6-foot sidewalk on both sides of the street under the bridge.

OR 43 Interchange:

- New multi-use path along riverside of OR 43 from I-205 southbound exit ramp to intersection with Willamette Falls Drive.
- New rapid flashing beacon and crosswalk to support bikes/pedestrians crossing OR 43 to access Willamette Falls Drive and West A Street.



A+C+D Procurement and Schedule – Phase 1A



Technical Approach and Qualifications Under Development:

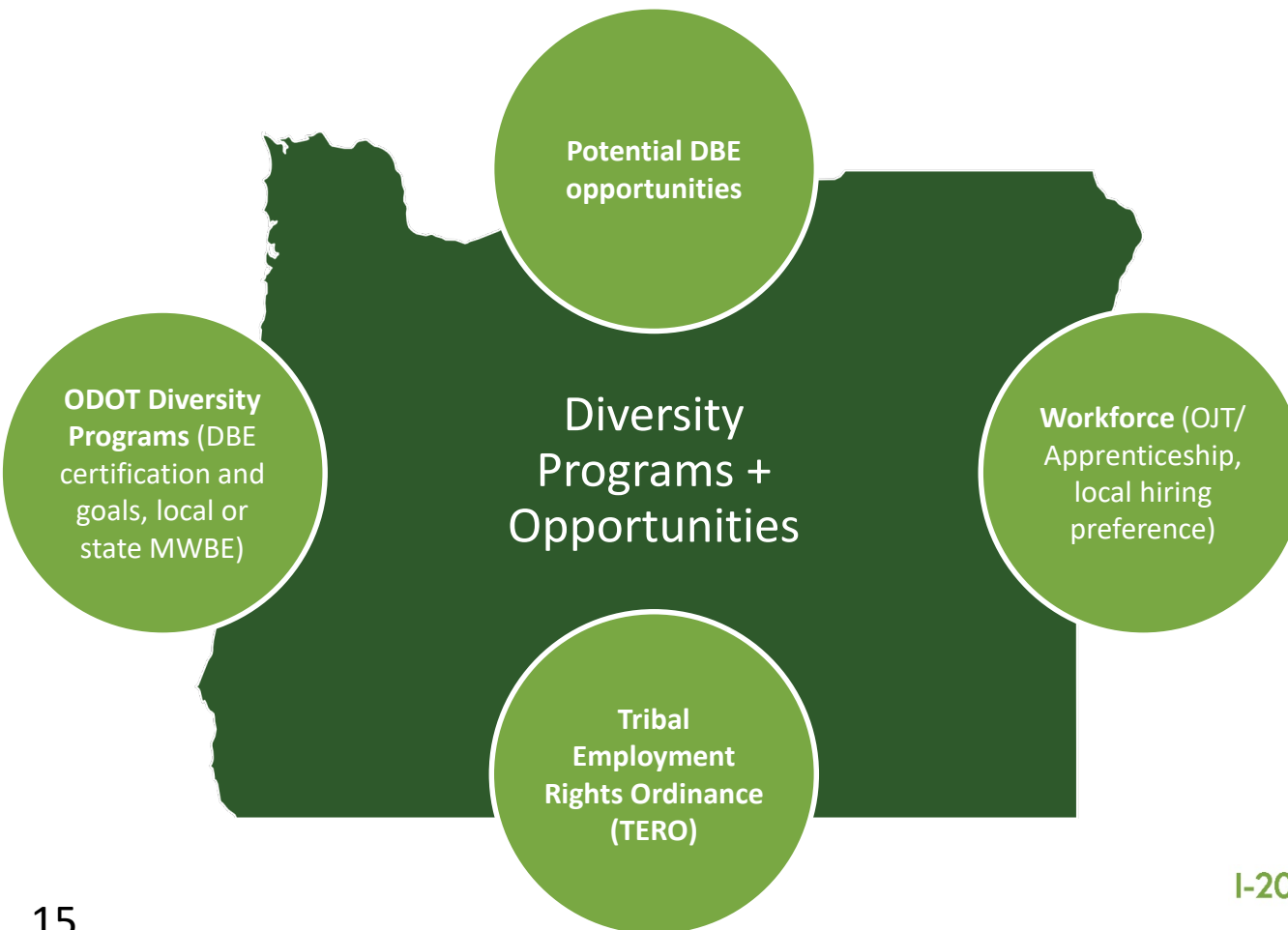
- Bridge construction – slide, drilled shafts, ground improvements, marine access, temporary work bridges
- Maintenance of traffic
- Permit compliance
- Temporary traffic control
- Diversity programs

Schedule Critical Item:

- Advertisement – 12 weeks (Anticipated early December 2021)
 - 8 weeks for technical, 4 weeks for price
- Anticipated Notice of Intent to Award - early March 2022
- Anticipate NTP – mid-April 2022

Diversity Programs + Opportunities

ODOT will implement DBE/workforce goals and require a Diversity Plan for the project.



ODOT is also applying to FHWA's Enhancing Workforce Development Opportunities Contracting pilot program, which would allow for local hiring preference among select zip codes.

STIP/MTIP Amendment

Amend 21-24 STIP/MTIP

- Add \$375 million in construction funds to deliver Phase 1A

HB 3055 Interim Financing Options

- Utilize short-term borrowing
- Bond against the \$30 million from HB 2017
- Borrowing/bonding repaid by tolls pending completion of tolling NEPA process

Spring 2021 – Spring 2022 Outreach

Outreach Focus Areas

- Phased construction
- Construction planning
 - Detours, noise variances
- Late 2021 site preparation and clearing



Spring 2021

- Local agency coordination
- Online open house & video
- Community briefings
- Newsletter, stakeholder emails
- Multicultural outreach (Spanish, Russian, Vietnamese, Traditional Chinese, Simplified Chinese)

Fall 2021

- Local agency coordination
- Community briefings
- Newsletter, stakeholder emails
- Multicultural outreach

Summer 2021

- Mobility Advisory Committee
- Contractor and industry events
- Stakeholder briefings
- Website reorganization

Spring 2022

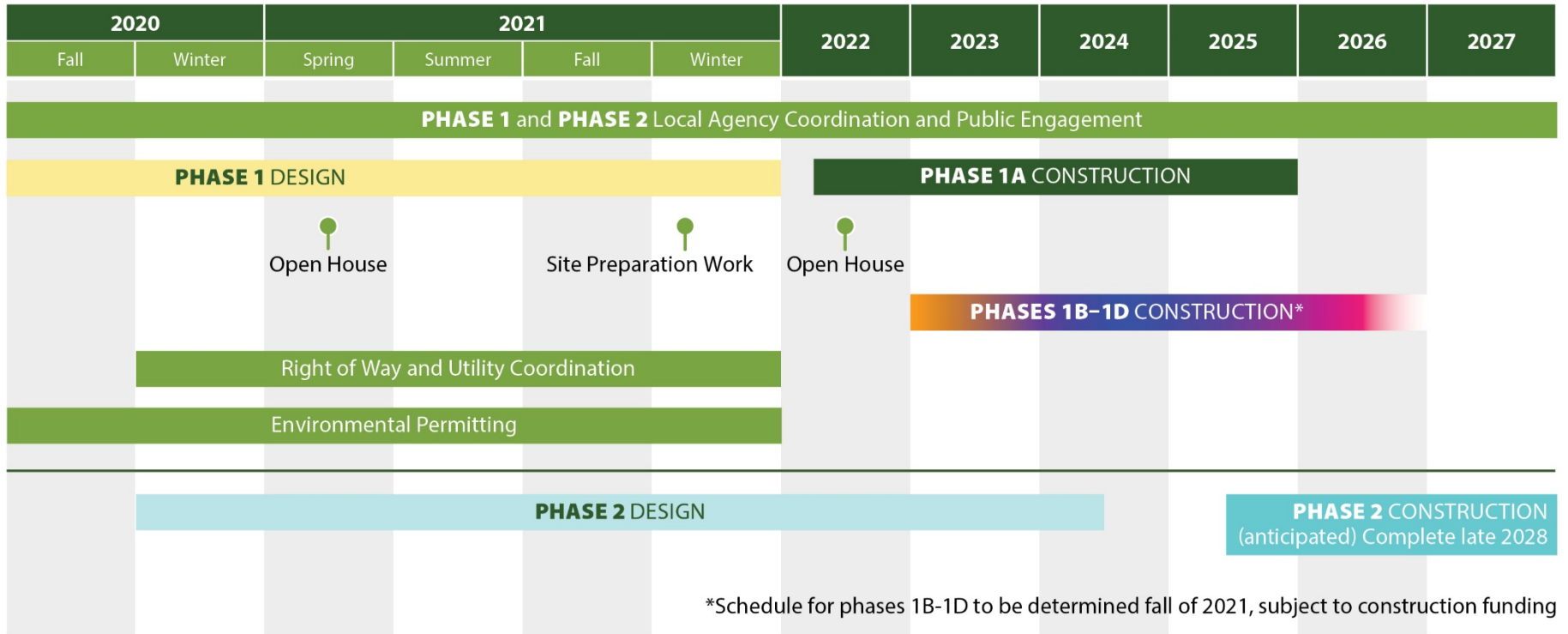
- Local agency coordination
- Community briefings
- Newsletters, stakeholder emails
- Multicultural outreach
- Online open house
- Social and digital media

Schedule and Next Steps

I-205 IMPROVEMENTS Stafford Road to OR 213



JUNE 2021



Thank You!

For more information, contact:

Mandy Putney – Project Director

Email: Mandy.PUTNEY@odot.state.or.us

I-205 IMPROVEMENTS
Stafford Road to OR 213



TO: C4 Metro Subcommittee

FROM: Karen Buehrig, Clackamas County TPAC Representative

DATE: July 7, 2021

RE: JPACT Action on Regional Congestion Pricing Study Report

At the June 16, 2021 C4 Metro Subcommittee meeting, Matt Bihn from Metro provided a presentation of the Regional Congestion Pricing Study. Since that time, the report has been revised to incorporate the feedback they received over the past month.

TPAC will be discussing the updates to the report at their meeting on July 9th and then JPACT will be asked to accept the findings and recommendations via resolution on July 15th, 2021.

Attached is the Metro staff memo which describes the updates and the draft Resolution accepting the findings and recommendations. At the July C4 Metro subcommittee meeting, TPAC members will provide an update of the TPAC discussion on this item and C4 Metro members can provide input to their JPACT representatives on the Regional Congestion Pricing Study Report and the Resolution to accept the study.

Date: July 9, 2021
To: Transportation Policy Alternatives Committee and Interested Parties
From: Elizabeth Mros-O'Hara, RCPS Project Manager
Subject: Regional Congestion Pricing Study –Discussion of final Regional Congestion Pricing Study Report and Resolution to Accept the Report Findings and Recommendations

Purpose

This meeting is to:

1. Discuss with TPAC revisions to the draft report to address comments in the Regional Congestion Pricing Study (RCPS) Final Report
2. Discuss with TPAC revisions to the draft recommended considerations for policy makers and future owners and operators to address comments in the final recommendations
3. Review the resolution to accept the RCPS final report that will be presented to JPACT and Metro Council for acceptance on July 15th and July 29th, respectively.

Request to TPAC

Learn how Metro has incorporated feedback from TPAC, JPACT, and Metro Council into the RCPS final report so TPAC members can brief their JPACT members prior to the July 15th meeting where JPACT will be asked to recommend that Metro Council accept the final RCPS report including its findings and recommendations.

Incorporating feedback into the report and recommendations

The Draft Report and Recommendations reflect two years of modeling, analysis, and input from technical staff, subject-matter experts and policy makers. TPAC provided important technical input on a regular basis to shape the findings, and JPACT and the Metro Council provided policy direction and other considerations to shape the study.

After completing the technical analysis, Metro shared draft recommendations, draft findings, and a draft RCPS report which were presented to TPAC, JPACT, and Metro Council for feedback in June. Metro also sent the Draft Regional Congestion Pricing Study Report to TPAC for comments. Comments were addressed and the report and recommended considerations were updated as described below.

Report

Attachment 1: Regional Congestion Pricing Study Final Report July 2021 includes a new executive summary and some minor revisions based on TPAC and stakeholder comments. Changes to the draft address comments on readability, clarifying considerations of an equity analysis and a potential suite of affordability programs to address equity concerns, and references to federal tolling stipulations. In addition, the report contains the final recommended considerations discussed below.

Recommended Considerations for Policymakers and Future Owners and Operators

Comments on the recommended considerations were focused on ensuring coordination with other pricing efforts and across different geographic scales, combining considerations that applied to both policy makers and future owners and operators; and making the recommendations more action-oriented and succinct. Metro staff has adjusted the recommendations as follows:

List of changes made as a result of feedback:

- Adjusted recommended considerations to have generalized considerations as well as considerations specific to policy makers or future project owners/operators.

- Added reference to other projects in the region
- Adjusted bullet about conversations related to pricing to include the state level when applicable.
- Added language to reflect that various pricing programs in the region should be coordinated.
- Added additional reference to impacts on low-income travelers.
- Modified wording to reflect suggestions from TPAC members.

Below are general recommended considerations for both policy makers and future project owners and operators, as well as specific recommendations that would apply to each group.

Recommended Considerations

- Congestion pricing can be used to improve mobility and reduce emissions. This study demonstrated how these tools could work with the region's land use and transportation system.
- Define clear goals and outcomes from the beginning of a pricing program. The program priorities such as mobility, revenues, or equity should inform the program design and implementation strategies. Optimizing for one priority over another can lead to different outcomes.
- Recognize that benefits and impacts of pricing programs will vary across geographies. These variations should inform decisions about where a program should target investments and affordability strategies and in depth outreach.
- Carefully consider how the benefits and costs of congestion pricing impact different geographic and demographic groups. In particular, projects and programs need to conduct detailed analysis to show how to:
 - maximize benefits (mobility, shift to transit, less emissions, better access to jobs and community places, affordability, and safety), and
 - address negative impacts (diversion and related congestion on nearby routes, slowing of buses, potential safety issues, costs to low-income travelers, and equity issues).
- Congestion pricing can benefit communities that have been harmed in the past, providing meaningful equity benefits to the region. However, if not done thoughtfully, congestion pricing could harm BIPOC and low-income communities, compounding past injustices.
- Conversations around congestion pricing costs, revenues, and reinvestment decisions should happen at the local, regional, and when appropriate the state scale, depending on the distribution of benefits and impacts for the specific policy, project, or program being implemented.

Specifically For Policy Makers

- Congestion pricing has a strong potential to help the greater Portland region meet the priorities outlined in its 2018 Regional Transportation Plan, specifically addressing congestion and mobility; climate; equity; and safety.
 - Technical analysis showed that all four types of pricing analyzed improved performance in these categories;
 - Best practices research and input from experts showed there are tools for maximizing performance and addressing unintended consequences.
- Given the importance of pricing as a tool for the region's transportation system, policy makers should include pricing policy development and refinement as part of the next update of the Regional Transportation Plan in 2023, including consideration of other pricing programs being studied or implemented in the region.

Specifically For Future Project Owners/Operators

- The success of a specific project or program is largely based on *how* it is developed and implemented requiring detailed analysis, outreach, monitoring, and incorporation of best practices.
- Coordinate with other pricing programs, including analysis of cumulative impacts and consideration of shared payment technologies, to reduce user confusion and ensure success of a program.
- Conduct meaningful engagement and an extensive outreach campaign, including with those who would be most impacted by congestion pricing, to develop a project that works and will gain public and political acceptance.
- Build equity, safety, and affordability into the project definition so a holistic project that meets the need of the community is developed rather than adding “mitigations” later.
- Establish a process for ongoing monitoring of performance, in order to adjust and optimize a program once implemented.

Next Steps - JPACT and Metro Council Acceptance of Findings and Recommendations via Resolution

JPACT will be asked at its next meeting on July 15, 2021 to recommend that Metro Council accept the findings and recommendations in the Regional Congestion Pricing Study report. Metro Council will then be asked to accept the findings and recommendations via resolution at its July 29, 2021 meeting.

The resolution and staff report are included for TPAC review as **Attachment 2: Resolution 21-5179 For the Purpose of Adopting the Findings and Recommendations in the Regional Congestion Pricing Study** and **Attachment 3: Resolution 21-5179 Staff Report**.

Questions for TPAC

- Do TPAC members have questions about the finalized recommendations and report?
- Are there specific areas where you want more information in order to brief JPACT members?

Attachments:

Attachment 1: Regional Congestion Pricing Study Final Report July 2021

Attachment 2: Resolution 21-5179 For the Purpose of Adopting the Findings and Recommendations in the Regional Congestion Pricing Study

Attachment 3: Resolution 21-5179 Staff Report

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ACCEPTING THE) RESOLUTION NO. 21-5179
FINDINGS AND RECOMMENDATIONS IN THE)
REGIONAL CONGESTION PRICING STUDY) Introduced by Chief Operating Officer
) Marissa Madrigal in concurrence with
) Council President Lynn Peterson

WHEREAS, the greater Portland region has experienced significant growth and demographic changes, that are forecasted to continue into the future; and

WHEREAS, the region's significant growth has resulted in increasing congestion, particularly on the greater Portland area's throughways; and

WHEREAS, this congestion affects quality of life as travelers sit in cars or on transit, and impacts the economy through delayed movement of goods and services and lost productivity; and

WHEREAS, congestion impacts climate, equity, and safety, and disproportionately affects Black, Indigenous and people of color (BIPOC) community members and people with lower incomes who typically have fewer resources and often need to travel long distances between their homes and their jobs; and

WHEREAS, ongoing efforts to address congestion in the region include directing growth in designated centers and corridors served by high-quality transit in combination with investments in system and demand management strategies, improving transit service and reliability, increasing bicycle and pedestrian connections and adding roadway capacity in targeted ways; and

WHEREAS, the 2018 Regional Transportation Plan (RTP) found that these strategies are not sufficient for addressing growing congestion and that the region must also manage demand; and

WHEREAS congestion pricing, wherein drivers are charged directly for their use of roadways, bridges, or parking, is used in congested cities around the world to improve mobility, reduce pollution and greenhouse gas emissions, and to raise revenue to fund investments in their transportation systems; and

WHEREAS, congestion pricing can implemented to replace or supplement the existing per gallon gasoline tax, which delivers declining revenues because it does not adjust for inflation and because the vehicle fleet is becoming more fuel efficient; and

WHEREAS, the 2018 Regional Transportation Plan (RTP) identified congestion pricing as a high priority, high impact strategy to address congestion in ways that also advanced achievement of the region's climate, equity, and safety goals and directed further study of this strategy prior to the next update to the RTP; and

WHEREAS, the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) adopted policies in the 2018 RTP to expand the use of pricing strategies to manage vehicle congestion and encourage shared trips and the use of transit; and in combination with increased transit service, consider use of pricing strategies to manage congestion and raise revenue when one or more lanes are being added to throughways designated in the RTP; and

WHEREAS, the Regional Congestion Pricing Study established a goal to understand how our region could use congestion pricing to manage traffic demand to meet climate goals without adversely impacting safety or equity, but not to recommend projects or to implement any pricing measures; and

WHEREAS, the study was conducted with input from several regional committees and elected bodies, such as the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), Metro's Committee on Racial Equity (CORE), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and ODOT's Equitable Mobility Advisory Committee (EMAC), the County Coordinating Committees (staff and policymakers), and direction from JPACT and Metro Council; and

WHEREAS, the Regional Congestion Pricing Study project coordinated with the Portland Bureau of Transportation and the Oregon Department of Transportation as they conduct their own pricing studies; and

WHEREAS, on April 22, 2021, Metro hosted an expert review panel made up of congestion pricing experts with diverse expertise in North America and Europe to provide input on the study methods and findings and to share lessons learned for their experiences elsewhere; and

WHEREAS, the expert panel endorsed the study's technical approach and findings related to potential benefits and impacts of the pricing tools addressed, and offered recommendations for further study and implementation; and

WHEREAS, the study evaluated four different congestion pricing strategies in the Metropolitan Planning Area—a Vehicle Miles Travelled Fee, Cordon Pricing, Roadway Pricing, and Parking Pricing--for their potential effectiveness in greater Portland based on whether they could help the region achieve the four priorities as laid out in the 2018 RTP – advancing equity, improving safety, reducing greenhouse gas emissions and managing congestion; and

WHEREAS, the study identified considerations around equity, implementation, and ways to maximize benefits and address impacts of pricing projects; and

WHEREAS, the study found that:

1. all four congestion pricing strategies could help the Portland Metropolitan Region to meet the four regional transportation priorities adopted in the 2018 Regional Transportation Plan;
2. all four congestion pricing strategies could reduce drive alone rates, vehicle miles travelled and emissions, and increase transit ridership;
3. some congestion pricing strategies could cause vehicle diversion in some locations resulting in areas of delay and decreased job accessibility by auto or transit;
4. all four strategies could increase the overall cost for travel in the region, but individual traveler costs would vary;
5. the benefits and burdens of congestion pricing may not be distributed equitably across the region, potentially disproportionately impacting BIPOC and other marginalized communities;
6. the flexibility of congestion pricing tools could be used to address equity concerns and the design and implementation of a program could mitigate negative impacts; and

WHEREAS, the study provides policymakers and jurisdictions with information on promising pricing strategies, recommendations for trade-offs to consider and further evaluate based on modeling and data analysis, and recommendations for equitable implementation; and

WHEREAS, on July 15, 2021 JPACT recommended acceptance of the report by the Metro Council; and

WHEREAS, by accepting the report, the Metro Council hereby recognizes the value in using the findings to inform planning, policy, investment priorities and ongoing efforts to manage congestion, advance equity, improve safety and reduce greenhouse gas emissions throughout the region, now therefore,

BE IT RESOLVED THAT:

1. The Metro Council hereby accepts the findings and recommendations in the Regional Congestion Pricing Study Report, as shown in the attached Exhibit A.
2. The Metro Council hereby directs staff to build upon existing policy in the RTP by incorporating the findings and recommendations from the study in the 2023 RTP and to use them to inform planning, policy development, and investment priorities through the 2023 RTP update.

ADOPTED by the Metro Council this 29th day of July, 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 21-5179, FOR THE PURPOSE OF ACCEPTING FINDINGS AND RECOMMENDATION IN THE REGIONAL CONGESTION PRICING STUDY REPORT

Date: July 1, 2021
Department: Planning and Development
Meeting Date: July 29, 2021

Prepared by:
Elizabeth Mros-O'Hara
elizabeth.mros-ohara@oregonmetro.gov

ISSUE STATEMENT

The 2018 Regional Transportation Plan (RTP) identified congestion pricing as a high priority, high impact strategy to manage transportation demand to help the region meet its four transportation priorities – climate, congestion, equity, and safety, and directed further study of this strategy prior to the next update to the RTP.

Congestion is a problem in the Greater Portland region that will be exacerbated by changing travel patterns and a growing population, causing serious economic, social and environmental impacts.

In 2019, the Portland metro area ranked as the 8th most congested region in the country, with people in spending an average of 89 hours stuck in traffic (Source: 2019 Inrix Global Scorecard). In addition to slowing down commuters, transit and freight, congestion worsens the transportation sector's already high contribution to regional greenhouse gas emissions, and has inequitable impacts. The lowest income households spend a higher proportion of their income on transportation than those with the highest incomes, and the longer a trips equate to the more expensive travel, and low income and minority neighborhoods experience more exposure to toxic air from emissions than the average neighborhood.

However, it is clear the region cannot build its way out of congestion because of induced demand. When capacity is added to the transportation facility to address congestion, travelers change their behavior by changing the frequency, route, travel mode, and time of their travel to take advantage of that increased capacity. With more people driving on the facility at the peak times, that facility becomes congested. Consequently, investments in capital projects must be paired with travel demand management tools like congestion pricing.

Congestion pricing is a travel demand tool that has been shown to reduce congestion, reduce emissions, improve equity, and sometimes even reduce crashes where it has been implemented. The Regional Congestion Pricing Study is an examination of how congestion pricing could perform in this region, with our land use and transportation system.

The Metro Regional Congestion Pricing Study (Exhibit A) explored whether congestion pricing can benefit the Portland metropolitan region. Staff assessed four different pricing tools to understand how pricing could support an equitable, safe and sustainable transportation system:

- **VEHICLE MILES TRAVELED FEE:** Drivers pay a fee for every mile they travel

- **CORDON PRICING:** Drivers pay to enter an area, like downtown Portland (and sometimes pay to drive within that area)
- **ROADWAY PRICING:** Drivers pay a fee to drive on a particular road, bridge or highway
- **PARKING PRICING:** Drivers pay to park in certain areas

In preparing the study, staff coordinated with existing committees (Transportation Policy Alternatives Committee, Joint Policy Advisory Committee on Transportation, and Metro Council) for guidance and worked with project funding partners at City of Portland and TriMet, as well as ODOT, which is working on separate, parallel pricing projects.

ACTION REQUESTED

Approve Resolution No. 21-5179 accepting the findings and recommendations in the Regional Congestion Pricing Study Report, as recommended by the Joint Policy Advisory Committee on Transportation (JPACT) on July 15, 2021.

IDENTIFIED POLICY OUTCOMES

This work fulfills the direction provided in Chapter 8 of the 2018 RTP (Moving Forward Together). Section 8.2.3.2 (Regional Congestion Pricing Technical Analysis) acknowledges that current transportation supply-focused strategies to address congestion in the region are insufficient, and that we must also manage demand. It calls for a comprehensive regional study to be undertaken before the next update to the RTP to evaluate potential mobility, climate and equity impacts and policy implications of various pricing programs, including cordon pricing, VMT-based pricing and network based pricing.

The study also supports the 2018 RTP's transportation equity goals and policies, and Metro's agency-wide racial equity goals and Strategic Plan to Advance Racial Equity Diversity and Inclusion.

Pending Council approval of Resolution No. 21-5179, this work will inform planning, policy and investment priorities in the 2023 RTP update and ongoing efforts to manage congestion in a way that advances equity, improves safety and reduces greenhouse gas emissions throughout the region.

STAFF RECOMMENDATIONS

Staff recommends approval of Resolution No. 21-5179.

ANALYSIS/INFORMATION

Coordination and Review

Metro staff worked with local and national consultants that have extensive experience in congestion pricing, specifically implementation of congestion pricing programs in other regions, equity considerations, and data analysis. The consultant team was led by Nelson\Nygaard and included Sam Schwartz Engineering, HNTB, Silicon Transportation Consultants, TransForm, Mariposa Planning Solutions and PKS International.

Staff solicited input from several regional committees and elected bodies, such as the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), the Metro

Policy Advisory Committee (MPAC), Metro's Committee on Racial Equity (CORE), the City of Portland's Pricing Options for Equitable Mobility (POEM) Task Force, and ODOT's Equitable Mobility Advisory Committee (EMAC), County coordinating committees (staff and policymakers), and direction from JPACT and Metro Council. The project coordinated with the Portland Bureau of Transportation and the Oregon Department of Transportation as they conduct their own pricing studies.

Metro also hosted an expert review panel made up of congestion pricing experts with diverse expertise in North America and Europe, who endorsed the study's technical approach and findings related to potential benefits and impacts of the pricing tools addressed, and offered recommendations for further study and implementation.

Advancing Metro's Racial Equity Goals and Climate Goals

This study can help advance Metro's racial equity goals by creating a foundational understanding of how to build equity into the congestion pricing program. The RCPS relied on best practices, input from local and national equity experts, and technical analysis (including modeling and mapping) to reveal the methods that a pricing program should employ to understand where benefits and impacts can occur and how the design of a program can improve equity.

Metro found that today's transportation funding system relies on regressive taxes and reinforces inequity by targeting the vast majority of spending to automobile infrastructure, favoring those that can afford a car, resulting in high emissions that disproportionately impact low income and BIPOC neighborhoods, and leave little funding for transit and active transportation which are disproportionately relied on by women, BIPOC, and low income populations.

A congestion pricing program can be more equitable if it employs best practices that are tailored to the places and people effected. Program design has the greatest potential to improve equity outcomes if it does three things: (1) builds affordability into the program (this can be realized in multiple ways such as providing discounts and exemptions for key groups or geographies), (2) focuses revenues on equity outcomes (this can include investing in key neighborhoods or facilities; focusing on transit, sidewalks, and/or bike lanes; and/or investing in senior or disabled services); (3) targets pricing benefits to key locations (mobility benefits and air quality can be targeted to equity communities).

The report lays out best practices any program going forward needs to employ to improve equity. In addition, it demonstrated that tools such as modeling and mapping are important to employ to understand the impacts and benefits to equity populations, geographies, and different types of travelers.

The study can also help advance Metro's climate action goals by helping lay the groundwork for congestion pricing tools to be moved forward. Each congestion pricing tool modeled and analyzed was shown to reduce greenhouse gasses and other harmful emissions.

Known Opposition – No known opposition.

Legal Antecedents

- Ordinance No. 18-1421 (For the Purpose of Amending the 2014 Regional Transportation Plan to Comply with Federal and State Law and Amending the Regional Framework Plan), adopted on December 6, 2018.
- 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), adopted on May 21, 2020.

Anticipated Effects

Congestion pricing projects are currently being planned in the metro area. Specifically, ODOT is proposing congestion pricing on I-5 and I-205 throughout the region, and the City of Portland is studying a variety of pricing strategies as part of their Pricing Options for Equitable Mobility (POEM) project. Approval of this resolution and acceptance of the Regional Congestion Pricing Study's findings and recommendations reaffirms the Metro's commitment to its four transportation priorities – climate, congestion, equity, and safety, and assures that Metro staff and committees will work with these and subsequent projects to ensure that those regional priorities are addressed as pricing projects are included in future updates of the RTP.

Attachments

Exhibit A – Regional Congestion Pricing Study Report

Memo

Date: July 1, 2021
To: JPACT and Interested Parties
From: Dan Kaempff, Principal Transportation Planner
Subject: 2025-2027 Regional Flexible Funds Allocation Program Direction

Introduction

Staff is presenting the 2025-2027 Regional Flexible Funds Allocation (RFFA) Program Direction and seeking JPACT’s approval.

Updating existing program direction

At the outset of each RFFA cycle, the region updates the Program Direction used in the previous cycle. This is done to ensure the regional funds continue to be aligned with updated Regional Transportation Plan (RTP) policy direction and respond to current and anticipated system needs. And it maintains consistency with previously adopted regional intent for the purpose and process used in allocating these funds.

Starting with input received through the 2022-2024 RFFA retrospective, Metro staff conducted a multi-month process to identify and discuss updates to the 2025-2027 RFFA Program Direction. Staff led a series of discussions with TPAC, JPACT, regional decision-makers and stakeholders to identify ways in which the Program Direction could be updated. A total of eight meetings and workshops were held to gather input, as listed below:

| 2025-2027 RFFA Program Development meetings | | |
|---|----------------|----------------|
| TPAC | JPACT | Workshops |
| February 5, 2021 | March 18, 2021 | March 10, 2021 |
| April 2, 2021 | May 20, 2021 | April 8, 2021 |
| May 7, 2021 | | April 28, 2021 |

In these meetings, several potential Program Direction adjustments were proposed and discussed. The following is a brief summary of the main topics of those discussions and how they have been responded to in the 2025-2027 RFFA Program Direction.

1. Change to single Step 2 project category – There is support for a single Step 2 category that provides greater flexibility than the previous two funding categories provided to allow for more comprehensive, multi-modal project applications. As was the case in previous RFFA processes, the intent is to provide this flexibility but to retain a focus on projects that advance active transportation (AT) and complete streets, and freight and economic development as the previous categories provided.

The 2025-2027 RFFA Program Direction will have one Step 2 category that reflects the RTP investment priority areas' intent. Projects will be evaluated in how well they implement the four RTP investment priorities. The criteria and associated measures will show that AT and freight and economic development will continue to be emphasized. But no specific funding amount is designated for either focus area.

2. No weighting of the four RTP priorities – The question of weighting any of the four RTP investment priorities was posed in the discussions. There was not an indication that participants felt any of the four priorities should be emphasized in the technical evaluation. The technical evaluation will develop a rating of each project within each of the investment priority areas in addition to an overall rating. Staff will present this information in such a way as to give decision-makers the ability to select projects that best advance any of the four priorities. The intent is to give decision-makers a clearer understanding of each project's relative strengths compared to others and more flexibility in how they prioritize projects for funding. As there is no policy direction to fund only the projects with the highest overall ratings, decision-makers can use this information to advocate for specific projects. Or they can use it collectively to develop a package of investments that achieve specific policy objectives.

3. Outcomes-based criteria – With the creation of a single-category Step 2, project evaluation criteria have been updated to reflect this change and more specifically articulate how the Investment Priority categories will be evaluated as an element of the Program Direction. The table in the 2025-2027 RFFA Program Direction lists the criteria to be used to demonstrate how thoroughly and completed a proposed project is aligned with RTP Investment Priorities. Further work to develop and refine performance measures will be conducted by a technical evaluation work group convened by Metro. The work group will be comprised of regional and local agency staff and community members with expertise in transportation. They will meet over the summer of 2021 to develop technical evaluation performance measures and methodology. Staff will present the evaluation methodology and framework to TPAC for their review and input prior to the opening of the project call in November 2021.

4. Evaluating economic outcomes – The RTP Investment Priorities were developed and adopted with an underlying principle that by focusing the region's investments on Equity, Safety, Climate and Congestion, economic benefits would also be achieved. While the Chapter 2 of the 2018 RTP identifies the importance of the regional transportation system in supporting a healthy, growing economy, it does not uniquely emphasize support for the economy as a near-term funding priority in Chapter 6.

While discussion indicated an overall belief that it is important to show how RFFA investments are helping improve the region's economy and supporting economic growth, there was not a preferred or recommended methodology identified for how to do that.

The technical evaluation will include performance measures that illustrate economic benefits. Examples of Metro data sources to be used to measure economic outcomes include the Economic Value Atlas and the Active Transportation Return on Investment. Further work to develop final measures will occur in the technical evaluation work group meetings.

5. Enhanced Transit Corridors/Better Bus – In response to TriMet's proposal to consider funding specific to Better Bus transit improvements, the indicated preference is to consider these investments through Step 2 project applications. Measurement of ETC elements in a proposed project will be included in the Step 2 evaluation methodology.

Coordination of Metro funding sources

As detailed in the memo included with TPAC materials, Metro intends to use the RFFA Step 2 project application and evaluation process in selecting trails projects to be funded through the 2019

Parks and Nature (P&N) bond measure. As RFFA has funded many trails projects and they are a critical part of the region's Active Transportation network, there is significant overlap with the purpose and intent of the P&N bond measure funding dedicated for trails. By using a single application process, the intent is to lessen the burden of funding applications and processes on local jurisdictions, and to improve the efficiency of funding allocation. It is important to note that trails projects will remain eligible for RFFA funding. Please refer to the attached memo for further details.

TPAC recommendation

In their June 4, 2021 meeting, TPAC discussed the draft 2025-2027 RFFA Program Direction and recommended JPACT approval of it. In their recommendation, TPAC requested the following clarifications be included:

- Additional language added (page 6) to address the uncertainty of the federal funding forecast as of this date. TPAC advised that along with the selection of Step 2 projects to be funded, a provisional list of projects be developed, should the amount of available funding in this cycle be greater than the estimated \$142,350,000.
- TPAC recommended that local agency staff assist with the development of performance measures and be included in the technical evaluation work group. Local agency staff participation is limited to performance measure development and they will not participate in the technical evaluation process.

Next steps/requested action

Staff is seeking JPACT approval of the TPAC-recommended 2025-2027 RFFA Program Direction. Upon JPACT's approval, Metro Council is scheduled to consider and take action to adopt it on September 9, 2021.



DRAFT 2025-2027 Regional Flexible Funds Allocation Program Direction

(Resolution 21-5194)

July 2021

Nondiscrimination Notice to the Public

Metro hereby gives public notice that it is the policy of the Metro Council to assure full compliance with Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 on Environmental Justice and related statutes and regulations in all programs and activities. Title VI requires that no person in the United States of America shall, on the grounds of race, color, sex, or national origin be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which Metro receives federal financial assistance. Any person who believes they have been aggrieved by an unlawful discriminatory practice under Title VI has a right to file a formal complaint with Metro. Any such complaint must be in writing and filed the Metro's Title VI Coordinator within one hundred eighty (180) days following the date of the alleged discriminatory occurrence. For more information, or to obtain a Title VI Discrimination Complaint Form, see the web site at www.oregonmetro.gov or call 503-797-1536.

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INTRODUCTION

As the federally designated Metropolitan Planning Organization (MPO) for the greater Portland, Oregon area, Metro is responsible for administering federal transportation dollars over which the region has allocation authority. Every three years, Metro conducts a process to select specific investments in the region's transportation system to be funded with these dollars. This process is known as the Regional Flexible Funds Allocation (RFFA). Allocating these funds is one of several activities required of MPOs, others being the development of the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP), and the Unified Planning Work Plan (UPWP).

Through the RFFA process, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council consider how the available funding can be used strategically to address needs identified through the RTP. The RTP establishes the vision, goals, and objectives for the Portland region's transportation system, as well as defines performance measures and an investment strategy to ensure progress is made towards creating the envisioned system. In particular, the RTP provides the policy framework to guide how specific sources of transportation funds should be coordinated in order to invest in all parts of the planned system.

JPACT and Metro Council adopted the most recent update of the RTP at the end of 2018. In the three years spent developing the 2018 RTP, an extensive outreach process resulted in nearly 19,000 individual points of contact with residents, community organizations, businesses, and elected officials.

Through this work with the community and policymakers, several investment priorities emerged. These priorities implement the 2040 Growth Concept by focusing on "moving people and goods, providing access, and helping to create and connect places." Of these priorities, Metro Council specified four as the main near-term capital and program investment priorities of the RTP: Equity, Safety, Climate and Congestion Relief.¹ These four priorities represent the framework for how funding is to be prioritized through the 2025-2027 RFFA.

Along with adopting the 2018 RTP, JPACT and Metro Council also adopted new modal and topical strategies for Transportation Safety, Freight, Transit and Emerging Technology. These strategies more fully articulate the integrated multi-modal regional transportation system and investments needed to improve the existing system, and complement the Regional Travel Options Strategy (2018), Regional Active Transportation Plan (2014), Climate Smart Strategy (2014) and Regional Transportation System Management and Operations Action Plan (2010). Collectively, these planning policy documents provide guidance for how the region can thoughtfully direct funding through the RFFA process to advance these four near-term investment priorities.

The 2025-2027 RFFA Program Direction builds upon previous RFFA policy established by JPACT and Metro Council. It has been updated to align with new regional policy from the 2018 RTP and the supportive modal and topical strategies, specifically focusing on the four investment priorities noted above. It continues the two-step funding approach adopted in 2011 for the 2014-2015 allocation cycle, which directs funding towards region-wide investments and supports construction of capital projects in specific focus areas.

¹ Metro Ordinance 18-1421

Funding allocated in Step 1 represents the region’s ongoing commitments to fund portions of the transportation system that are critical to following through on RTP-identified goals and objectives. Step 1 investments support federal, state, and regional requirements for building a multi-modal transportation system, meeting federal air quality regulations, and reducing greenhouse gas emissions from vehicles, per mandates from the state.

New in this RFFA cycle is an updated Step 2 capital projects category. A series of three workshops were held in March and April 2021 to gather input from regional stakeholders on what updates they felt were critical to addressing the current needs of the transportation system. As the current two-step funding approach has been in use since 2011, stakeholders indicated that the region should consider updating the existing Step 2 project funding categories: Active Transportation and Complete Streets, and Freight and Economic Development Initiatives. In response, a single capital projects category is adopted through this Program Direction that focuses on projects that improve the system in multiple ways.

REGIONAL SIX DESIRED OUTCOMES

In 2008, Metro Council and MPAC adopted the Six Desired Outcomes to form the framework of a performance-based approach for policy and investment decisions. Those outcomes are:

- **Equity:** The benefits and burdens of growth and change are distributed equitably
- **Vibrant communities:** People live and work in vibrant communities where their everyday needs are easily accessible
- **Economic prosperity:** Current and future residents benefit from the region’s sustained economic competitiveness and prosperity
- **Safe and reliable transportation:** People have safe and reliable transportation choices that enhance their quality of life
- **Clean air and water:** Current and future generations enjoy clean air, clean water, and healthy ecosystems
- **Climate Leadership:** The region is a leader in minimizing contributions to global warming



Six desired outcomes for greater Portland – Adopted by the Metro Council in 2008.

The Six Desired Outcomes shape the way in which all regional plans and policies reflect and orient towards achieving the desired outcomes. The 2018 RTP identifies needed next steps to achieve each of the Six Desired Outcomes for the region’s transportation system.

2018 REGIONAL TRANSPORTATION PLAN INVESTMENT PRIORITIES

The 2018 RTP serves as the blueprint for the regional transportation system for the next 25 years. It identifies 11 specific goals, 43 related objectives and four priorities that define the region’s aspirational system and describes a strategy for making near-term investments intended to make progress towards that system.

RTP Chapter 2 lays out this vision and includes nine system performance targets to provide a basis for measuring expected performance of the plan in the long-term. Chapter 6.2 provides specific priorities to guide investments to demonstrate the region’s actions are following its commitments

and demonstrate progress towards the performance targets. Projects funded through the 2025-2027 RFFA are to align with the RTP investment priorities identified in Chapter 6.2.

These near-term investment priorities emerged from a three-year discussion and identification of the region's most urgent transportation needs by regional policymakers. They guided the development and refinement of the 2018 RTP projects and programs list and reflect direction from JPACT and Metro Council to prioritize near-term investments to address these priorities.

The four RTP Investment Priorities are:

- **Equity:** Reduce barriers and disparities faced by historically marginalized communities, particularly for communities of color and people with low income
- **Safety:** Reduce fatal and severe injury crashes to move the region as quickly as possible toward Vision Zero, particularly for communities of color and other historically marginalized communities
- **Climate Change:** Reduce greenhouse gas emissions from cars and small trucks to reduce the impacts of climate change, particularly for communities of color and other historically marginalized communities
- **Congestion:** Manage travel demand and increase use of travel options to make travel more reliable on the region's busiest roadways, particularly for communities of color and other historically marginalized communities

Figure 1: 2018 RTP Investment Priorities



The 2018 RTP determined that the Six Desired Outcomes could best be achieved by making transportation investments focusing on these four priorities. The first of seven key investment recommendations states the following:

“Make more near-term progress on key regional priorities – equity, safety, travel options, Climate Smart Strategy implementation and congestion. Advance projects that address these outcomes to the 10-year list to make travel safer, ease congestion, improve access to jobs and community places, attract jobs and businesses to the region, save households and businesses time and money, and reduce vehicle emissions.”²

The 2018 RTP also resulted in updates to the plan’s aspirational performance targets. The performance targets are quantitative benchmarks used to assess the region’s progress in carrying out the RTP vision through its investment priorities. These performance targets are the highest order evaluation measures in the RTP performance-based policy framework – providing key criteria by which progress towards the plan goals can be assessed. The targets are listed in Table 1. A complete description of the performance targets is found in Chapter 2 of the 2018 RTP.

REGIONAL TRANSPORTATION FINANCE APPROACH

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

The approach identifies funding mechanisms agencies use and a regional strategy for sources to be pursued to address unmet needs of the different elements of transportation system in the region. The approach has been utilized in the development of RFFA policies since the 2010-2013 MTIP cycle and updated as needed to reflect current planning policy. Additionally, as other available funding opportunities have emerged since the 2010-2013 MTIP cycle, the regional finance approach has been a starting point for informing a regionally coordinated set of priorities to pursue

Table 1: Regional Transportation Plan Performance Targets

| | | |
|---|--|--|
| 1 |  | AFFORDABILITY Reduce the combined housing and transportation expenditure for lower-income households by 25%, compared to 2015 |
| 2 |  | SAFETY Eliminate transportation fatalities and serious injuries for all users by 2035, with a 50% reduction by 2025 and a 16% reduction by 2020, compared to 2015 |
| 3 |  | MULTIMODAL TRAVEL Reduce vehicle miles traveled per person by 10%, compared to 2015 |
| 4 |  | MODE SHARE Triple walking, biking and transit mode shares, compared to 2015 |
| 5 |  | SYSTEM COMPLETION Complete 100% of the regional network of sidewalks, bikeways and trails |
| 6 |  | CONGESTION Meet the Interim Regional Mobility Policy for throughways, arterials and the regional freight network |
| 7 |  | FREIGHT DELAY Reduce vehicle hours of delay per truck trip by 10%, compared to 2040 No Build |
| 8 |  | CLIMATE CHANGE Reduce per capita greenhouse gas emissions from cars and small trucks by 20% by 2035 and 25% by 2040, compared to 2005 |
| 9 |  | CLEAN AIR Maintain or reduce air pollution from mobile sources, compared to 2015 |

² 2018 RTP, Chapter 6, Table 6.2

those other funding opportunities. Recognizing the regional transportation finance approach has influenced the development of a coordinated regional list of capital investment priorities, tailored to the context of the funding opportunity – such as the 2020 regional transportation funding measure and the congressional request of regional priorities for appropriations earmarks – the 2025-2027 RFFA Program Direction follows the core principles of the regional finance approach.³

Uses for regional flexible funds, as defined in the regional transportation finance approach include:⁴

- Active Transportation
- Arterial Expansion, Improvements, and Reconstruction⁵
- Throughway Expansion⁶
- High-capacity Transit Expansion
- Transportation System Management and Operations
- Regional Travel Options
- Transit Oriented Development

REGIONAL FLEXIBLE FUNDS ALLOCATION OBJECTIVES

The following objectives define how the RFFA process should be conducted and what outcomes should be achieved with the overall allocation process.

1. Select projects from throughout the region; however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring State Implementation Plan for air quality requirements are met and that an adequate pool of CMAQ-eligible projects is available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage the application of projects that efficiently and cost-effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an areas stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.

³ See Metro Council Resolution 16-4702.

⁴ Most recent regional transportation finance approach is from the 2021-2024 MTIP policy.

⁵ Limited to arterial freight facilities for ITS, small capital projects, and project development.

⁶ Limited to project development with large discretionary funding leverage opportunities to address multiple transportation issues around the mainline facilities, focusing on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

Per RTP Equity Policy 7, projects and programs funded through the RFFA should demonstrate support of family-wage job opportunities and a diverse construction workforce through inclusive hiring practices and contracting opportunities for investments in the transportation system.

2025-2027 REGIONAL FLEXIBLE FUNDS STRUCTURE

The 2025-2027 RFFA follows the two-step framework the region has followed starting with the 2014-2015 allocation process. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives.

A total of \$142,350,000 is projected to be allocated in the 2025-2027 federal fiscal years. Funding amounts for each of the funding areas is as shown in Table 2 below.

Table 2: Total 2025-2027 Regional Flexible Funds

| | |
|---|----------------------|
| Step 1A: Transit & Project Development Bond Repayment Commitment | \$65,280,000 |
| Step 1B: Region-wide Program Investments, Planning | \$35,820,186 |
| Step 2: Capital Investments | \$41,249,814 |
| Total 2025-2027 RFFA | \$142,350,000 |

Step 1 consists of two funding focus areas. Step 1A repays bonds issued to develop and construct key elements of the region’s multi-modal system. 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.

Step 2 provides capital project funding to develop and construct improvements to the regional system. The focus of these project funds is on completing gaps or improving the active transportation system and making strategic improvements to support a healthy economy and help freight move more easily.

If a federal authorization bill is not completed by the time of the release of the Step 2 call for projects or the time to recommend projects for selection, the use of an “illustrative list of projects” may be considered as a means of managing the uncertainty of funding levels and ensuring the region is preparing an adequate pipeline of projects to prepare to obligate available funding as quickly as possible.

Step 1A – Bond Repayment Commitments



Regional flexible funds have been used to help construct the region's high-capacity transit system. Since 1998, TriMet has issued bonds to pay for project development and capital construction costs of high-capacity transit line construction, based on a regional commitment of flexible funds to repay the bonded debt. The region's current obligation to repay bond debt extends to 2034. This bond obligation covers investments in Green, Orange, and Southwest Corridor MAX lines, Division Transit Project, and the Eastside Streetcar Loop.

In the 2019-2021 RFFA process, JPACT and Metro Council directed regional funding to be used to develop a selected package of improvements to address regional active transportation needs, and freeway interchanges or arterials that were identified as significant system deficiencies, particularly in the areas of safety and freight delay.

Regional flexible funds were used in a manner consistent with the Regional Transportation Finance Approach that targets these funds to the connecting arterial portions of freeway interchange projects and Active Transportation projects. For projects coordinated with freeway mainline and associated interchange elements, flexible funds were invested as a part of a multi-agency approach to addressing multiple transportation issues around the mainline facilities and focused on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

The regional bond commitments through 2034 for transit and project development are shown below in Table 3. Funding to be allocated in the 2025-2027 RFFA cycle is highlighted in blue.

Table 3: Regional bond repayment commitment schedule

| Federal Fiscal year | Amount (millions) |
|---------------------|-------------------|
| 2025 | \$21.78* |
| 2026 | \$21.76* |
| 2027 | \$21.74* |
| 2028 | \$17.28 |
| 2029 | \$17.26 |
| 2030 | \$17.24 |
| 2031 | \$17.22 |
| 2032 | \$17.19 |
| 2033 | \$17.17 |
| 2034 | \$17.15 |

* Amount due in each of the three years of the 25-27 RFFA cycle

Bond repayment commitments for the 2025-2027 RFFA cycle are:

Bond Repayment Commitment **\$65,280,000**

Step 1B – Region-wide program investments, MPO and regional planning

Region-wide program investments

Three region-wide programs have been defined over time by their regional scope, program administration, and policy coordination, and a consistent allocation of regional flexible funds to support them. The three programs are:

- **Regional Travel Options/Safe Routes to School** – Grants to local partners that support public outreach and encouragement, to help people reduce automobile use and travel by transit, ridesharing, bicycling or walking, and to build a coordinated regional Safe Routes to School program
- **Transit Oriented Development** – Investments to help develop higher-density, affordable and mixed-use projects near transit, to increase the use of the region’s transit system and advance the Region 2040 Growth Concept
- **Transportation System Management and Operations** – Capital funding focused on improving the region’s transportation data, traffic signals, traveler information and other technological solutions to help move people and goods more safely, reliably, and efficiently.



Funding targets are set for the existing region-wide programs in this cycle based on their historical allocation levels which includes an annual increase to address increasing program costs and maintain purchasing power. The region-wide programs are reviewed in each RFFA cycle. A report was given to TPAC in their May 2021 meeting. The report provides the following information about each program:

- Program description – description of the program purpose and its major activities
- Regional Funding Strategy Context – description of why the program is appropriate for regional flexible funding, per the Regional Finance Approach
- Directly related RTP performance targets – description of how the program helps the region meet performance targets in the RTP
- Connection to other plans or strategies – description of how program investments are linked to addressing other planning requirements (for example, the State Implementation Plan for air quality, included as part of the strategy demonstrating the region can meet state mandated greenhouse gas reduction targets)
- Program strategic plan or recent planning work completed to date – description of how the strategic plan helps set priorities for implementation
- Program performance to date – description of specific accomplishments of the program
- Future activities – description of work to be conducted over the next three years
- Additional opportunities – description of priorities or activities the program would pursue given additional resources

Region-wide program investments for the 2025-2027 RFFA cycle are:

| | |
|---|---------------------|
| Regional Travel Options/Safe Routes to School (RTO/SRTS) | \$11,102,371 |
| Transit Oriented Development (TOD) | \$11,806,111 |
| Transportation System Management and Operations (TSMO) | \$ 5,943,432 |

c. MPO, Freight, Economic Development, Corridor and System Planning

Regional funds are used to support planning, analysis and management work required of an MPO. JPACT and Metro Council have directed these funds to be spent instead of collecting dues from each partner jurisdiction in the region as was done prior to 1992. Regional funds have also been directed towards continued planning work to further develop regional corridors, transit and freight networks, and to better understand the economic impacts of our transportation investments.

Planning commitments for the 2025-2027 RFFA cycle are:

| | |
|---------------------------------------|---------------------|
| MPO Planning (in lieu of dues) | \$ 4,730,789 |
| Corridor and System Planning | \$ 2,237,483 |

Step 2 – Capital Investments

The 2025-2027 RFFA program direction incorporates a new Step 2 capital projects category. This new category updates the previous modal categories and funding targets in favor of a single category but maintains the same focus on improving the region’s active transportation network and supporting freight mobility and economic outcomes.

Existing practice is that JPACT and Metro Council desire that a strategic approach is followed to allocating Step 2 funds, including:

- A topically or geographically focused impact rather than an array of disconnected projects
- Achieves appreciable impacts on implementing a regional scale strategy given funding amount available
- Addresses specific outcomes utilizing the 2018 Regional Transportation Plan Performance Targets
- Prioritizes catalytic investments (leveraging large benefits or new funding)
- Positions the region to take advantage of federal and state funding opportunities as they arise

In the development of the 2025-2027 RFFA and following up on the input received from the 2022-24 RFFA retrospective, a series of stakeholder workshops was convened to advise JPACT and TPAC on how the regional funding could be directed in a manner that best reflects 2018 RTP investment priority direction. Participants were asked to provide proposed adjustments or changes to the existing RFFA program direction to better align it with RTP policy.



Through the workshop process participants indicated continued support for investment in projects that improve the region's active transportation system and support the region's economy, as has been the RFFA focus in prior funding cycles. But they also indicated that more flexibility in how projects could be conceived and evaluated could result in projects that achieve multiple outcomes and lead to better outcomes regarding the four RTP investment priorities and the nine performance targets.

Project development approach and technical evaluation criteria

Workshop input indicated support to eliminate the Step 2 project categories of Active Transportation/Complete Streets and Freight/Economic Development and their associated funding targets (75%/25%). Participants supported a process that allows projects to be proposed of any mix of mode and function improvements identified as appropriate for the regional flexible funds through the Regional Transportation Finance Approach and that best advance the RTP Investment Priority categories.

The criteria shown below in Table 4 (center column) will be used in the technical evaluation for proposed Step 2 projects. The criteria illustrate how the region is investing in its stated priorities. Projects that perform well in the technical analysis will demonstrate significant and measurable improvements in each of these criteria.

Table 4: Step 2 Project Technical Evaluation Criteria

| 2018 Regional Transportation Plan Priorities ⁷ | Outcome(s) Being Measured (Project Criteria) ⁸ | Performance Measures to Consider ⁹ |
|---|--|--|
| <p>Equity</p> <p>Reduce barriers and disparities faced by historically marginalized communities, particularly for communities of color and people with low income.</p> | <p>Increased accessibility</p> <p>Increased access to affordable travel options</p> | <ul style="list-style-type: none"> • Access to opportunity (jobs, school and other destinations people need to thrive) • Access to transit • Access to active transportation network/system completeness in Equity Focus Areas, near transit, and/or on high injury corridors and TSMO and TDM programs |
| <p>Safety</p> <p>Reduce fatal and severe injury crashes to move the region as quickly as possible toward Vision Zero, particularly for communities of color and other historically marginalized communities.</p> | <p>Reduced fatal and serious injury crashes for all modes of travel</p> | <ul style="list-style-type: none"> • System completeness of bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs • VMT/capita • Multi-Modal Level of Service, LTS, ped crossing index |
| <p>Climate Change</p> <p>Reduce greenhouse gas emissions from cars and small trucks to reduce the impacts of climate change, particularly for communities of color and other historically marginalized communities.</p> | <p>Reduced emissions from vehicles</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • VMT/capita • System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials and/or on high injury corridors and TSMO and TDM program |
| <p>Congestion</p> <p>Manage travel demand and increase use of travel options to make travel more reliable on the region’s busiest roadways, particularly for communities of</p> | <p>Increased reliability</p> <p>Increased travel efficiency</p> <p>Increased travel options</p> <p>Reduced drive alone trips</p> | <ul style="list-style-type: none"> • Travel time • Travel time reliability • VMT/capita • Duration of congestion |

⁷ Summarized from 2018 RTP Regional Transportation Plan

⁸ Criteria refinements will be developed prior to the Call for Projects in November 2021

⁹ Final RFFA performance measures will be developed prior to the Call for Projects in November 2021

| 2018 Regional Transportation Plan Priorities ⁷ | Outcome(s) Being Measured (Project Criteria) ⁸ | Performance Measures to Consider ⁹ |
|---|---|--|
| color and other historically marginalized communities. | | <ul style="list-style-type: none"> • Volume/capacity ratio • System completeness of transit, bike, pedestrian networks in EFAs, near transit, on arterials, on regional freight routes and/or on high injury corridors and TSMO and TDM programs |

Further staff work will take place during the summer of 2021 to complete the Step 2 performance measures and provide additional guidance to applicants prior to the Call for Projects in November 2021. The performance measures listed above are examples and may not completely reflect the final measures. Metro will convene a technical evaluation work group to help develop performance measures. The work group membership will include regional agency staff and community members with expertise in transportation. A subset of the work group will assist in the technical analysis of Step 2 project proposals.

The technical analysis will measure how completely and thoroughly proposed projects address the criteria. The analysis will include both quantitative and qualitative measures to provide decision-makers with a well-rounded understanding of the proposed project’s attributes and improvements to the regional system.

Depending on the proposed projects submitted for consideration, additional emphasis in evaluating projects may be required to ensure there is an adequate pool of projects that will be eligible to utilize the different sources of federal funding allocated to projects in the RFFA/MTIP process, particularly the use of Congestion Mitigation/Air Quality (CMAQ) funds.

TOTAL Step 2: **\$ 41,249,814**

STEP 2 PROJECT SELECTION PROCESS

All project funding proposals received in the Step 2 Capital Project category will be considered for selection using the following process:

Proposer Workshop – Prior to the Call for Projects, Metro will hold a proposer’s workshop(s). The purpose of this is to clarify the application and evaluation approach to help proposers prepare thorough project proposals that fully demonstrate project benefits and system improvements. The desired outcome is to ensure proposers understand how criteria will be used to evaluate their project, and that they understand what factors will be reviewed in determining the thoroughness of the project’s scope, budget and timeline.

Call for Projects – Metro will issue the call for project proposals in November 2021. Applicants will have approximately four months to complete proposals, which are due in February 2022.

Technical Evaluation – A work group will review and rate the submitted proposed projects. Proposals will receive a technical score reflecting how well the project addresses the criteria. In addition to this quantitative analysis, the technical report will also include qualitative information to reflect attributes about each project that may not be reflected in a strict numerical score.

By presenting both quantitative and qualitative information, decision-makers and the public can better understand the technical merits of projects, which will help to better inform the regional decision-making process.

Risk Assessment – To ensure that RFFA-funded projects can be delivered as proposed, on time, and within budget, Metro will conduct a risk assessment process on each proposal, and issue a report documenting the findings of the process. Proposals will be evaluated on how completely the project has been planned, developed and scoped, and measure the risk of project completion within the 2025-2027 timeframe.

This report will be made publicly available and used as a part of the regional decision-making process.

The Technical Evaluation and Risk Assessment processes will occur concurrently in March and April 2022.

Public Comment – Following issuance of the Technical Evaluation and Risk Assessment reports, Metro will conduct a 30-day public comment period in May 2022, focusing on outreach to community and neighborhood organizations, county coordinating committees and other stakeholders. A joint public meeting of JPACT and Metro Council is planned to give decision-makers the opportunity to hear public testimony on project proposals. A summary of input received through the public comment period will be made available along with the Technical Evaluation and Risk Assessment reports to inform the final RFFA decision making process.

County Coordinating Committee/City of Portland Recommendations – Each county coordinating committee and the City of Portland will have the opportunity to provide recommendations to decision-makers on which projects submitted from their jurisdictions

best reflect their local priorities. Recommendations are to be provided to TPAC and JPACT in advance of the TPAC action to recommend a package of projects to JPACT.

TPAC/JPACT Discussion and Action – Following the above information gathering steps, TPAC will be asked to consider and discuss the input received, and to provide a recommendation to JPACT on a package of projects to be funded, including both Step 1 and Step 2 investments.

JPACT will consider and discuss the TPAC recommendation, and will be requested to take action to refer a package of projects to Metro Council in September 2022.

Council Action – Metro Council will consider and take action on the JPACT-referred package in October 2022.

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

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Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700