



Clackamas
County
Coordinating
Committee

Promoting partnership among the County, its Cities, and Special Districts

C4 Metro Subcommittee Agenda

**Wednesday, March 15, 2017
7:30 AM – 9:00 AM**

Clackamas County Development Services Building
Room 120
150 Beaver Creek Road, Oregon City, OR 97045

7:30 a.m. Welcome & Introductions

7:35 a.m. JPACT Issues

- *Draft Unified Planning Work Program*
- *Active Transportation – 10 year Strategy*
- *State Transportation Funding Package Update*

8:15 a.m. MPAC Issues

- *2018 Regional Transportation Plan (RTP) Update*

9:00 a.m. Adjourn

Attachments:	JPACT/MPAC Work Programs	Page 02
	Staff Memo Detailing Discussion Items	Page 06
	2017-18 Unified Planning Work Program	Page 07
	Regional Active Transportation Project Development Pipeline	Page 14
	2018 Regional Transportation System Plan Update	Page 22

For additional information, contact Karen Buehrig at karenb@clackamas.us or 503-742-4683.



2017 JPACT Work Program
As of 3/9/17

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

<p><u>March 16, 2017</u> **starting at 7:00am</p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Resolution No. 17-4774, For the Purpose of Amending the 2015-18 Metropolitan Transportation Improvement Program (MTIP) to Provide Significant and Required Funding Adjustments Involving ODOT, Portland, and Metro Projects (consent) – Recommendation • Draft Unified Planning Work Program (UPWP) 2017-2018 – Information/Discussion (John Mermin, Metro; 10 min) • Powell-Division Transit LPA and RTP Amendment – Information/Discussion (Elizabeth Mros-O’Hara, Metro; 20 min) • Update on Regional Policy and Funding Priorities for 2017 State Transportation Legislation – Information/Discussion (Andy Shaw, Metro; 30 min) • Discussion and Determination of RFFA Project (Cleveland St. or Division St.) (Kaempff/Leybold, Metro; 40 min)- Recommendation <p><u>March 11-15</u>: National League of Cities Conference, Washington, D.C.</p> <p><u>March 22</u>: Metro Regional Partnership Forum, Oregon Zoo Education Center, 5:00-7:30pm</p>	<p><u>April 20, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) <ul style="list-style-type: none"> ○ MPO Federal Grant Endorsement Policy • Recommended Additions to the National Multimodal Freight Network – Information/Discussion (Tim Collins, Metro; 10 min) • 2018 RTP Update: Building the RTP Investment Strategy – Information/Discussion (Ellis, Metro; 20 min) • 2018 RTP Update: Vision Zero and Safety Crash Data Analysis – Information/Discussion (Lake McTighe, Metro; 20 min) • 2018 RTP: Regional Transit Strategy (Jamie Snook, Metro; 20 min) • Draft Unified Planning Work Program (UPWP) 2017-2018 – Recommendation (John Mermin, Metro; 10 min) <p><u>March 28</u>: Prep Meeting for JPACT D.C. Trip, Metro Regional Center, 5:30-7:00pm</p> <p><u>April 5-6</u>: JPACT D.C. Trip</p>
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<p><u>May 18, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018 RTP: Regional Freight Plan Update (Tim Collins, Metro; 20 min) • 2018 RTP Update: Building the RTP Investment Strategy – Recommendation (Ellis, Metro; 30 min) • Powell-Division Transit LPA and RTP Amendment – Recommendation (Elizabeth Mros-O’Hara, Metro; 30 min) • Recommended Additions to the National Multimodal Freight Network – Recommendation (T. Collins, Metro; 5 min) 	<p><u>June 15, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018-2021 Metropolitan Transportation Improvement Program (MTIP) – Information/Discussion (Ted Leybold/Grace Cho, Metro; TBD)
<p><u>July 20, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018 RTP: Digital Mobility (Frisbee, Metro; TBD) • 2018 RTP: Resilience (Ellis, Metro; TBD) • 2018-2021 Metropolitan Transportation Improvement Program (MTIP) – Recommendation (Ted Leybold /Grace Cho, Metro; TBD) 	<p><u>August 17, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min)
<p><u>September 21, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) 	<p><u>October 19, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min)
<p><u>November 16, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018 RTP: Investment Strategy Findings and Background on Regional Leadership Forum #4 (Ellis, Metro; TBD) 	<p><u>December 21, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min)

RTP Regional Leadership Forums:

- **April 2016:** RTP Regional Leadership Forum #1 (Exploring Big Ideas for Our Transportation Future)
- **September 2016:** RTP Regional Leadership Forum #2 (Building the Future We Want)
- **December 2016:** RTP Regional Leadership Forum #3 (Connecting Our Priorities to Our Vision)
- **December 2017:** RTP Regional Leadership Forum #4 (Drafting Our Shared Plan for the Region)
- **June 2018:** RTP Regional Leadership Forum #5 (Finalizing Our Shared Plan for the Region)

Parking Lot:

- Southwest Corridor Plan
- Land use & transportation connections
- Prioritization of projects/programs
- Westside Freight Study/ITS improvements
- All Roads Safety Program (ODOT)
- Air Quality program status update
- Washington County Transportation Futures Study (TBD)

2017 MPAC Work Program

As of 03/01/17

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

<p><u>Wednesday, March 8, 2017</u></p> <ul style="list-style-type: none"> • Powell-Division Transit Locally-Preferred Alternative (LPA) and RTP Amendment – Information/Discussion (Elizabeth Mros-O’Hara, Metro; 40 min) • Urban Growth Management: Summary of Proposed Work Program – Information/Discussion (Ted Reid, Metro; 45 min) <p><i>Mar. 11-15: National League of Cities Conference, Washington, D.C.</i> <i>Mar. 17: Equitable Housing Initiative Speaker Event: Tony Pickett, Metro Regional Center, 8 – 9:30am</i></p>	<p><u>Wednesday, March 22, 2017</u></p> <ul style="list-style-type: none"> • Metro Regional Partnership Forum, Oregon Zoo Education Center, 5:00-7:30pm
<p><u>Wednesday, April 12, 2017</u></p> <ul style="list-style-type: none"> • 2018 RTP: Regional Transit Vision – Information/Discussion (Jamie Snook, Metro; TBD) • 2018 RTP Update: Vision Zero and Safety Crash Data Analysis – Information/Discussion (Lake McTighe, Metro; 30 min) 	<p><u>Wednesday, April 26, 2017</u></p> <ul style="list-style-type: none"> • 2018 RTP Update: Building the RTP Investment Strategy – Information/Discussion (Ellis, Metro; 60 min) • 2018 RTP: Regional Freight Plan Update – Information/Discussion (Tim Collins, Metro; TBD)
<p><u>Wednesday, May 10, 2017</u></p> <ul style="list-style-type: none"> • Powell-Division Transit LPA and RTP Amendment – Recommendation (Elizabeth Mros-O’Hara, Metro; 40 min) • 2018 RTP Update: Building the RTP Investment Strategy – Recommendation (Ellis, Metro; 40 min) 	<p><u>Wednesday, May 24, 2017</u></p>
<p><u>Wednesday, June 14, 2017</u></p>	<p><u>Wednesday, June 28, 2017</u></p>

<u>Wednesday, July 12, 2017</u>	<u>Wednesday, July 26, 2017</u> <ul style="list-style-type: none"> • 2018 RTP: Digital Mobility (Frisbee, Metro; TBD) • 2018 RTP: Resilience (Ellis, Metro; TBD)
<u>Wednesday, August 9, 2017</u>	<u>Wednesday, August 23, 2017</u>
<u>Wednesday, September 13, 2017</u>	<u>Wednesday, September 27, 2017</u>

Upcoming events:

- December 2017: RTP Regional Leadership Forum #4 (Drafting Our Shared Plan for the Region)
- June 2018: RTP Regional Leadership Forum #5 (Finalizing Our Shared Plan for the Region)

Parking Lot:

- Presentation on health & land use featuring local projects from around the region
- Greater Portland, Inc. update
- “Unsettling Profiles” presentation by Coalition of Communities of Color
- Washington County Transportation Futures Study
- System development charges (SDCs)
- City of Portland inclusionary housing
- November 2017: 2018 RTP – Investment Strategy Findings and Background on Regional Leadership Forum #4
- Economic Value Atlas
- Affordable housing grants

C4 Metro Subcommittee Staff Memo

Re: Items to be discussed under JPACT Issues and MPAC Issues

Date: March 8, 2017

Summary

1) Draft Unified Planning Work Program - Discussion

The Draft 2017-18 Unified Planning Work Program will be distributed and discussed. This is a federally required document that is produced annually. It included transportation PLANNING projects and activities that use federal funds.

Attachment: 2017-18 Unified Planning Work Program. PowerPoint given to TPAC

2) Active Transportation – 10 year Strategy – JPACT briefing

Metro has been working with a broad stakeholder group to identify a menu of Active Transportation projects that were considered high priority, near term projects. A 10- year strategy for investing in the Active transportation system is being developed, using two different investment scenarios. During March, Metro will be working with staff to develop the draft scenarios. Outcomes could be used as examples during the legislative session this Spring. This process will fold together with the RTP call for projects over the summer.

Attachment: Regional Active Transportation Project Development & Pipeline

3) 2018 Regional Transportation System Plan (RTP) Update - MPAC

Over the next few months, MPAC and JPACT will be receiving information about the 2018 Regional Transportation Plan (2018 RTP). Metro is about midway through the 2018 RTP process. Attached is a project schedule. A key element, the “Call for Projects” will be conducted in June and July. These will be the projects that ultimately are included in the Constrained and regional Priorities RTP lists.

Attachment: 2018 RTP Timeline and Update on the 2018 Regional Transportation Plan Call for Projects

For additional information, please contact:

Karen Buehrig, Transportation Planning Supervisor karenb@clackamas.us



Metro

2017-18 Unified Planning Work Program

TPAC, February 24, 2017

John Mermin, Regional Planner

Overview

- 2017-18 Draft Federal Self-Certification
- Draft 2017-18 UPWP

What's changed since last month?

- Section I. Transportation Planning:
 - Regional Transportation Planning (p.1)
 - Title VI – Environmental Justice (p.23)
 - Public Involvement (p.32)
- Section III. MPO Administrative Services:
 - MPO Management & Services (p.67)
- Section IV. Metro Corridor Planning and Projects of Regional Significance
 - Corridor Refinement & Project Development (Investment areas) (p.77)
 - SW Corridor Plan: New paragraph reflecting grant award (p.75)
- Section V. Other Projects of Regional Significance
 - South Metro Area Regional Transit (SMART) (p.110)

Feedback from Feb 23 Consultation meeting with USDOT

- No major changes recommended
- House keeping edits to provide more clarification
- Edits will be incorporated (along with any TPAC edits) into the Draft that JPACT will be provided at their March 16 meeting.

What is the UPWP

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

What the UPWP isn't

- Not a regional policy making document
- Not a funding decision document, does not allocate funds
- No construction, design, or preliminary engineering
- Only includes transportation planning projects, federal funds, coming fiscal year

Next Steps

- March 16 JPACT, Draft (*handed out at meeting*)
- April 20 JPACT, Action
- May 4 Metro Council, Action
- May 5 Submit to USDOT & ODOT

Regional Active Transportation Project Development & Pipeline the Region's 10-year Investment Strategy in Active Transportation

Background

An overall theme of the 2019-21 Regional Flexible Fund Allocation (RFFA) cycle is to strategically leverage funding to position the region to win federal, state and local transportation funding increases. This approach led JPACT and the Metro Council to direct a portion of the 2019-2021 regional flexible funds to be used for project development to support preparing a package of throughway, arterial, high capacity transit, and active transportation projects to address several of the region's most urgent transportation needs.¹ The RFFA policy identifies \$2million for project development of regional active transportation projects.

While specific throughway and transit projects² were identified in the RFFA policy, no specific active transportation projects were identified. Metro proposed a coordinated process with regional partners to identify projects to receive the RFFA bond proceeds and develop a pipeline of projects to be available for new funding sources; the pipeline will essentially be the region's 10-year investment strategy for active transportation. Projects identified to receive bond proceeds for project development will be a *subset* of the larger pipeline of projects, acknowledging that agencies have already, or will be, investing resources to develop many projects that should be on the pipeline. Metro's Transportation Policy Advisory Committee (TPAC) provided input and direction on the proposed process.

Metro convened a regional work group comprised of staff from local jurisdictions, capital agencies, TMAs, public health and advocacy groups. The work group met twice in September and October 2016 and developed a list of projects that met a set of guiding criteria: local priority, equity, safety, project design, addressing congestion, regional significance, geographic balance, safe routes to school, access to transit and centers, and deliverability. The total cost of the list of projects is \$1.3 billion. Projects were identified by

¹ Step 1.B. of the 2018-2021 Metropolitan Transportation Improvement Program and 2019-2021 Regional Flexible Funds Allocation Policy Statement included \$3.78 million of flexible funds be used to generate approximately \$12 million in bond revenue. Of this \$12 million, \$10 million is to be used to support arterial and related project development associated with efforts already initiated by ODOT to develop projects to address three major regional bottlenecks. The remaining \$2 million is to support project development for active transportation projects. (Step 1.A in the MTIP policy identified \$105 in bond proceeds for SW Corridor and Division BRT.)

² Rose Quarter, I-205 Abernathy Bridge, Hwy 217, the SW Corridor, and Division BRT. The policy states: "By showing local commitment of its flexible funds (to transit), the region will be well-positioned to qualify for additional federal as well as other funding sources." And: "JPACT recommends that \$3.78 million of Step 2 funding be used to develop a selected package of improvements to address regional active transportation needs, and freeway interchanges or arterials that are identified as significant system deficiencies, particularly in the areas of safety and freight delay." And: "Bonding \$3.78 million of the flexible funds will create \$12 million in bond revenue for a regional freight and Active Transportation project development program to advance a package of multi-modal and multi-facility projects that can leverage discretionary federal resources, support a 2017 legislative transportation funding effort and a 2018 regional transportation funding initiative."

agencies as having a high, medium or low level of confidence in deliverability. The majority of the projects have a high level of confidence.

Along with the list of projects, Metro staff developed an approach of bundling the projects into three investment categories – Safe Routes to Schools, Critical Connections, and Access to Jobs and Transit,³ and sketched out two funding scenario options for a 10-year investment timeline.

Investment Categories

Investment categories help describe the investment scenarios in a meaningful way. Most projects provide multiple benefits – access to jobs, schools and centers, safety, fill critical gaps, etc. – and could easily fit into more than one of the categories. The intent of the investment categories is to clearly demonstrate the major benefits in a simple way.

- **Critical Connections** – Address congestion and mobility with regional bikeways and trails connecting centers and filling critical gaps. Makes bicycling competitive to driving with shorter commutes and reliable travel times. Supports statewide tourism and recreation.
- **Safe Routes to School** – Address safety and access to schools, focusing on primary bike/walk route(s). Make it easy to walk and bike to school. Focus on high injury corridors and barriers on arterials within ½ mile of schools. Addresses safety issues for Title 1 schools in historically marginalized communities.
- **Access to Jobs and Transportation** – Improved pedestrian and bicycle access to frequent transit and station communities. Provides first-last mile connection to job centers (e.g. PDX, centers) and major employers (e.g. Nike).

Regional Active Transportation Funding Scenario Options – 10-year Investment Strategy

Status Quo <i>Today's annual investment level</i>	Scenario I - \$300 million <i>Modest additional annual increase in investment</i>	Scenario II - \$600 million <i>Additional annual increase in investment</i>
\$10 million annually	\$20 million annually (\$30 million total)	\$50 million annually (\$60 million total)
Eighty percent is from federal—assumes continuation of these funds	State \$100 million TIGER \$100 million Regional \$100 million	State \$100 million TIGER \$100 million Regional \$100 million Regional II \$300 million
	Critical Connections	Critical Connections
	Safe Routes to School	Safe Routes to School
	Access to Jobs and Transit	Access to Jobs and Transit

³ The Investment Categories were identified based on polling, experience in other regions, and input from local jurisdictions, which identify congestion, safety and access as top needs to address

Under the Status Quo Scenario (which accounts for federal, state, and regional funding investments (not local) in the *regional* active transportation network) it will take over 200 year to complete the Regional Active Transportation Network.⁴

Metro staff presented the project list and funding scenarios proposal to the JPACT Finance Sub-committee on January 30, 2017. At the Jan 30 meeting members of the committee provided input on the proposal. Members of the committee expressed:

- General support for using the three investment categories, Safe Routes to School, Critical Connections and Access to Jobs and Transit.
- Need to further prioritize and narrow the list of projects into the \$300 million and \$600 million packages was acknowledged.
- Need to further develop the investment categories using the \$2 million was acknowledged.
- Use the bond proceeds strategically, develop a few projects that can be competitive
- More Return on Investment analysis would be useful
- Overriding need to address congestion – use ROI to show how active transportation is helping
- Need to clearly articulate what outcomes we are trying to accomplish

NEXT STEPS

With general direction provided by the JPACT Finance Sub-committee, Metro staff proposes the following process to use the \$2 million in bond proceeds to further develop specific projects, develop the investment scenarios and potentially develop a smaller set of projects ready for competitive federal funding, such as TIGER.

The **overarching goal** is to develop a pipeline of active transportation capital projects that will help improve safety and connectivity, and relieve congestion, throughout the region. It is in the region’s best interest to have a list of projects that achieve regional outcomes, have a high ROI, and that are as shovel-ready as possible, in order to pursue and advocate for funding to build out our active transportation system. In order to help advocate for these projects, we must also be able to communicate the benefits the public can expect to see after construction.

1. Definition of \$300 and \$600 million packages (March- April and May-July)

Working with partner jurisdictions, Metro will support and manage a process that results in \$300 million and \$600 million lists of projects, drawn from the \$1.3 billion list developed by the regional work group. (Refer to the end of the document for a description of the process to define the lists.)

The first goal is to have the two packages (\$300 & \$600 million) with general analysis (e.g. number of students impacted, number of miles, number of transit stations with better access, etc) by April for use in the State Legislative session.

The second goal is that the lists (\$300 million or \$600 million) will also serve as the 10-year investment strategy for active transportation in the 2018 RTP.⁵ The lists developed for April will not be “set in stone” – that is they can still be refined through the RTP call for projects, which starts June 1 and ends July 21. However, the intent is to have a solid list that

⁴ As identified in the 2014 Regional Active Transportation Plan.

⁵ Level of investment will be guided by JPACT discussion starting in April, 2017.

Metro and partners can share in the transportation funding discussions during the legislative session. Through the 2018 RTP “Call for Projects” agencies will be able to continue to refine the projects that are in the \$300 million and \$600 million investment strategies, as well as those identified for later implementation (e.g. 2035).

The lists will be organized by the investment categories – Critical Connections, Safe Routes to School and Access to Jobs and Transit - and represent the region’s highest priority projects for regional, state and federal funding in the next 10 years (at the two different levels of investment - \$300 million and \$600 million). Metro will work with the jurisdictions and agencies to determine which projects go onto which lists, and which are left off for later funding. *(Further discussion is needed on how to approach the larger (and more expensive) roadway projects on the list that include important active transportation elements while also increasing auto capacity and mobility.)*

- Projects on the \$300 million list should have a high level of confidence in deliverability. Projects that do not have a high level of confidence today, but that should be on the \$300 million list, would be candidates for the bond proceeds to get to that level.
- Projects should be over \$1 million.⁶ Projects with smaller price tags could be bundled into “downtown pedestrian improvements” or “regional arterial crossings” or “safe routes to school in NE quadrant.” However, bundled projects still need to identify specific projects and locations.
- Projects should help complete the regional active transportation network (as identified in the 2014 Regional Active Transportation Plan.⁷
- Projects should have a high ROI (equity, safety, economic, etc), that is they should meet as many as of the guiding criteria listed on page 1 as possible.

Process to define the \$300 million and \$600 million lists

a) Drawing from the \$1.3 billion list, Metro will compile draft \$300 and \$600 million scenarios. The Draft scenarios created by Metro will be a 150% list. The target amounts listed below, based on population,⁸ will be used by the County Coordinating TACs and Portland to refine the lists. Note that the \$600 million scenario is comprised of the projects in Scenario I (the \$300 million scenario) and an additional \$300 million in projects. For example, Portland’s target amount for the \$300 million scenario is \$117 million. An additional \$117 million in projects, plus those in the \$300 million scenario, would be included in the \$600 million scenario.

- Portland: Scenario I - \$117 M, and additional \$117 M in scenario II
- Clackamas County: Scenario I - \$51 M, and additional \$51 M in scenario II
- Multnomah County: Scenario I - \$30 M, and additional \$30 M in scenario II
- Washington County: Scenario I - \$99 M, and additional \$99 M in scenario II

⁶ There will be a \$1 million threshold for projects in the RTP, and projects must be on the regional transportation network.

⁷ RTP System Maps: <https://gis.oregonmetro.gov/rtp/>

⁸ 2010 population- funding targets based on rounded numbers

	Region	City of Portland	Clackamas County	Multnomah County	Washington County
% of Population	100%	39.25%	17.6%	9.89%	33.26%

- Each of the draft scenarios will include funding, \$3 M and \$6 M respectively, for TriMet Bike and Ride Facilities.
 - Distribution of the Safe Routes to School buckets are determined by percentage of students in Portland/Multnomah County (45%), Washington County (40%), and Clackamas County (15%).
- b) By March 10, the Draft scenarios will be sent to the County Coordinating TACs and Portland in a spreadsheet. The TACs and Portland, in coordination with staff from ODOT and TriMet, will refine the scenarios and provide a list of changes to Metro, ideally by the end of March.
 - c) At the end of March, Metro will update the spreadsheet based on changes identified by the County Coordinating TACs and Portland and prepare a document that describes the two scenarios, the projects, and includes maps, images, and basic ROI analysis (e.g. number of students served, number of jobs with increased access, etc.) to be used during the legislative session in April.
 - d) In May, Metro will reconvene the regional work group (jurisdictions, agencies, and advocates) to assess the lists for completeness (e.g. underserved communities, geographic distribution, investment categories are unbalanced, strategic, etc). The desired outcome is to develop the two investment scenarios that achieve regional outcomes, while also being feasible. If gaps in the lists are identified, Metro and the regional work group will discuss how to improve the package.
 - e) Through the 2018 RTP “Call for Projects” agencies will be able to continue to refine the projects that are in the \$300 million and \$600 million investment strategies. To avoid duplicating work and to lessen impact on local agencies, Metro will strive to include all of the projects on the lists, with updated information, in the project database that will be provided to agencies with the call for projects. Projects that are not included in either the \$300 million or \$600 million scenarios should be considered for inclusion in the RTP for future investment.

Cost: \$0 – Metro will continue to fund this effort

2. Baseline Development and Definition of Projects (May - July)

The projects on the \$1.3 billion list are at varying levels of definition (some projects are much better defined than others; some have questions that need to be answered; some have missing information, etc). This missing information is necessary to conduct the ROI analysis and to assess project feasibility.

In conjunction with the 2018 RTP project solicitation process, missing baseline information on each of the projects on the \$300 million and \$600 million lists will be provided by the agencies. Metro will provide a form, through the RTP call for projects to collect the information.

Once the missing baseline information is provided, Metro will hire a consultant to conduct a review of each project to identify project delivery vulnerabilities (on either the \$300 million list only, or both lists – TBD). The review will include small group interviews with County Coordinating staff (representing the County as a whole)/Portland staff, Metro, ODOT, and TriMet and any other staff needed. These review meetings will also provide an opportunity

to discuss which projects could most benefit additional project development support from the bond proceeds, where the package of projects overall needs development (e.g., identify specific list of projects for access to transit and Safe Routes to Schools investment categories) and to identify potential candidate projects for a TIGER application.

Cost: \$100,000

3. Identify Projects for Additional Project Development (June - August)

Metro and partners will identify which projects (from the \$300 million list) should receive bond proceeds for project development.⁹ Potential projects will be identified through the consultant review of projects at small group meetings with County Coordinating staff (representing the County as a whole)/Portland staff, Metro, ODOT, and TriMet and any other staff needed. The meetings will involve discussing the projects on the lists and identifying projects that:

- Are on the \$300 million list.
- Have a high probability of a maximum ROI and achieve regional outcomes (equity, safety, access, etc.)
- Help flesh out the investment categories (Critical Connections, Safe Routes to School, Access to Jobs and Transit) for the whole \$300 million package
- Advance most pressing issues (project vulnerabilities) for timely project deliverability
- Advances the \$300 million package as a whole

Once identified, the projects receiving bond proceeds for project development will need to be approved by JPACT and the Metro Council. The full list of the \$300 million and \$600 million packages will be presented at that time as well.

Cost: \$1, 650,000

4. Return on Investment Analysis (June - August)

To “make the case” for additional investment in active transportation, it is necessary to describe how the \$300 million and \$600 million packages will benefit the region in a variety of ways: congestion, safety, access, economy, health, equity, etc. Depending on the size of the RTP investment packages, the ROI may include all of the active transportation projects in the 2018 RTP.

Working with the regional work group (jurisdictions, agencies, and advocates), Metro will establish basic ROI evaluation metrics, including number of miles built, number of school children for whom safety is improved, miles of trails connected, projected impact on transit ridership, access to transit, projected safety impact, mode share, public health impacts, number of underserved households who will see improved access and safety, economic

⁹ All of the projects on the \$300 million (and \$600 million) list should be high priority projects. Some of the projects on the list will not need additional project development (e.g. French Prairie Bridge in Wilsonville or the Sullivan’s Crossing in Portland), some will need minimal project development which could be done when the project is funded, and some will need more project development to address project vulnerabilities to reach that “high level of confidence.” It is the last set of projects that should be the primary use of the bond proceeds. The bond proceeds will likely not address all of the need. At that point there may need to be a discussion about what to do with vulnerable projects that are on the \$300 million list and that do not use bond proceeds (e.g. identify local funds for additional project development work).

impact, etc. The evaluation metrics will be informed by the performance measures discussion of the 2018 RTP, and examples from other cities, regions and states.

Metro will hire a consultant to conduct ROI analysis on the \$600 million and \$300 million list of projects. This will also provide an ROI evaluation for the 10-year active transportation investment strategy for the 2018 RTP, and will inform possible TIGER grant.

Cost: \$100,000

5. Packaging and Communication Materials (August)

Metro will hire a consultant to package the projects and ROI information into a set of materials that can be used (and easily updated) for a variety of purposes including: maps, information on each of the projects, outcomes, benefits, etc. will be developed. Files can be made available to jurisdictions, agencies and communities to re-purpose and use as needed.

Cost: \$50,000

6. (Potential) TIGER Application of Regional AT Projects (August)

Working with partner jurisdictions Metro will discuss the potential of developing a regional active transportation TIGER application (looking to successful applications such as Utah's Connected Communities proposal). Metro would coordinate efforts to develop a set of projects (from the \$300 million list of projects) for a strong regional active transportation TIGER application. This would likely be around \$70 million worth of projects (seeking no more than \$18 million in federal match). The application will benefit from the baseline development and definition of projects and the ROI. Additional analysis will likely be necessary. If there is an agreement to pursue the grant opportunity, Metro will hire a consultant to develop the application. Additional discussion is needed and the timing (and TIGER criteria) is still uncertain at this point.

Cost: \$100,000

Public Involvement

Metro will convene the regional active transportation work group as needed to help guide the development of the investment packages. Jurisdictions and agencies can also use local processes (e.g. advisory committees) as needed to vet the list and process. Public involvement will also benefit understanding and support of the 2018 RTP investment strategy. TPAC will be updated throughout the process.

Timeline

2017 Develop Investment Scenario Packages & Identify Projects for Bond Proceeds	
Jan 30	JPACT Finance Sub-Committee provides direction on menu of projects
February 22	Discuss next steps in process with TPAC jurisdiction representatives
March 10	Metro provides draft scenarios to County Coordinating Committee TACs and Portland
March 16	JPACT briefed on Finance Sub-Committee meeting (if agenda allows)
March 30	TPAC update on process (if agenda allows)
March 31	County Coordinating Committee TACs and Portland, with ODOT and TriMet, refine lists for the \$300 million and \$600 million scenarios – provide list of changes to Metro by end of March.
April	\$300 and \$600 scenarios are packaged and available for use in Salem
May	Metro reconvenes regional work group to: assess scenarios for completeness, discuss ROI criteria and process
June 1	2018 RTP call for projects – projects in scenarios are included in the base list of projects
July	Consultant baseline and definition of projects completed; vulnerability review conducted
June-July	\$300-600 scenario- lists incorporated into RTP call for projects
August	Finalize which projects for project development funding; JPACT approval
August	ROI of different scenarios

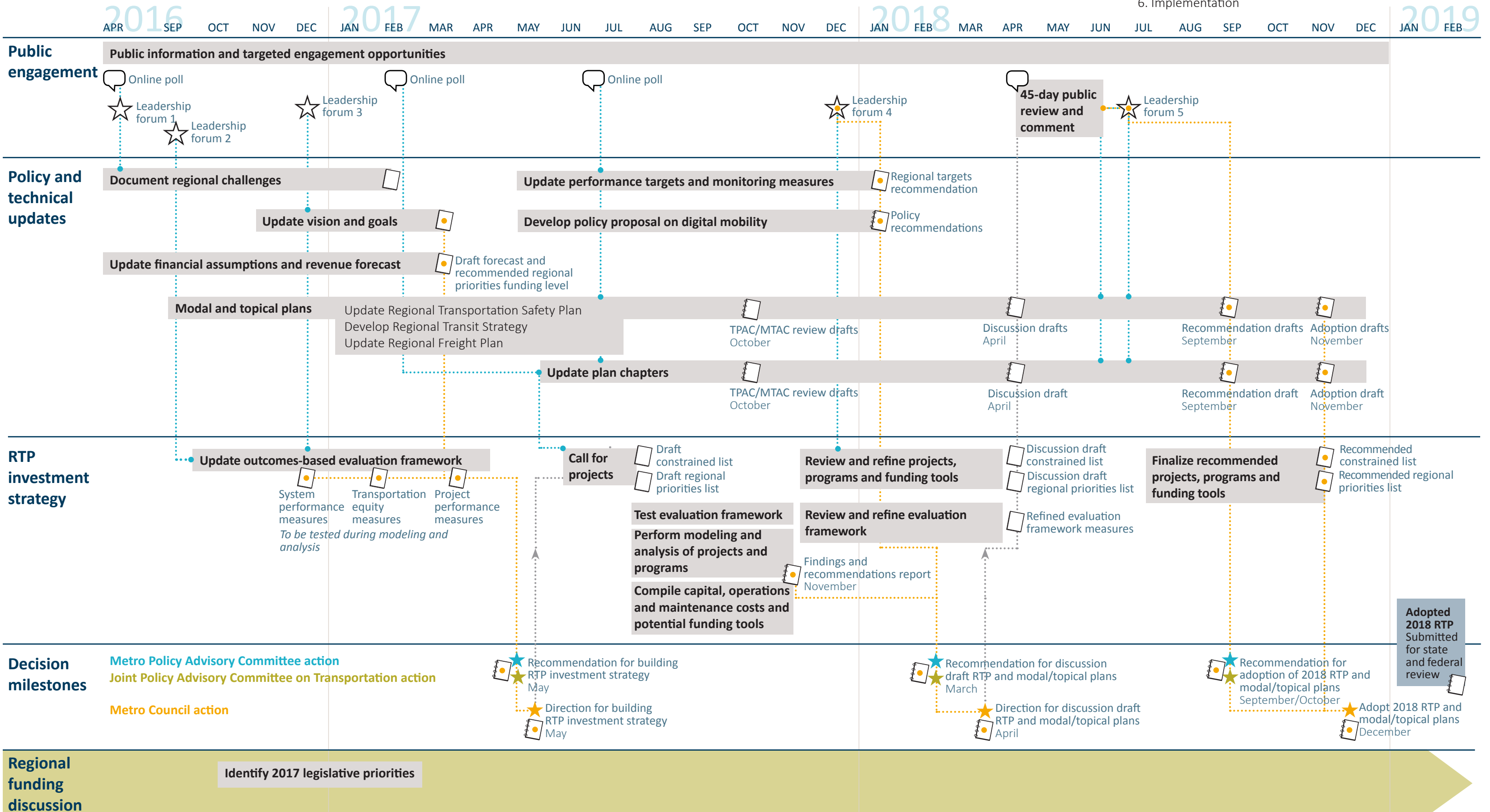
Timeline | 2018 Regional Transportation Plan



- Key**
- Materials to support decision-making
 - Public engagement incorporated and addressed
 - Metro Council direction incorporated

- Key Steps in Process**
1. Confirm vision and goals
 2. Determine regional priorities funding level
 3. Conduct call for projects
 4. Assess performance
 5. Recommend plan and investment strategy

- 2018 RTP Chapters**
1. Regional challenges
 2. Vision and policies
 3. Funding
 4. Investments
 5. Performance
 6. Implementation



Memo



Date: February 24, 2017
To: TPAC and interested parties
From: Kim Ellis, RTP Project Manager
Subject: Update on 2018 Regional Transportation Plan Call for Projects

PURPOSE

This memo provides an update on the process and timeline for building the 2018 Regional Transportation Plan (RTP) Investment Strategy.

Pending direction from the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council, on June 1, 2017 Metro will issue a “call for projects” to update the region’s transportation investment priorities to support regional policies and goals for safety, congestion relief, community livability, the economy, equity, and the environment. More detailed instructions for submissions, supporting forms, and on-line resources are in development for agencies to use. The deadline for submitting all required forms will be July 21, 2017.

ACTION REQUESTED

No action is requested at this meeting. This is the first of several discussions related to the upcoming project solicitation process. At the February 24 meeting, TPAC is requested to discuss the following questions to help staff prepare guidance and other materials to support the Call for Projects:

1. What suggestions do you have for increasing transparency and collaboration between project sponsors and partner agencies responsible for updating investment priorities?
2. What resources or guidance would be helpful?
3. Do you have other comments or suggestions for staff on the project solicitation process?

Staff will present the draft Constrained Priorities revenue forecast and approaches for sizing the overall 2018 RTP Investment Strategy at the March 31 TPAC meeting. In addition, TPAC is invited to participate in a technical workshop with the Metro Technical Advisory Committee (MTAC). The workshop will be held on April 14 from 9 to 11 AM at Metro in the council chamber. The workshop provides an opportunity for more in-depth discussion of the the 2018 RTP Call for Projects process, including draft application materials and on-line resources.

The upcoming discussions will help shape recommendations for the Metro Council, the Metro Policy Advisory Committee (MPAC), and the Joint Policy Advisory Committee on Transportation (JPACT) to consider in April and May as part of their broader direction on building the 2018 RTP Investment Strategy.

THE OPPORTUNITY

Regional context

Much has changed in the region since the adoption of the Regional Transportation Plan (RTP) and Regional Active Transportation Plan (ATP) in 2014. Since the adoption of the 2014 RTP and ATP, several projects have been completed (e.g., Sellwood Bridge, Portland-Milwaukie Light Rail, Sunrise Project (Phase 1, Unit 1)). In addition, TriMet completed plans for expanding local and regional transit service, and the Metro Council and JPACT adopted an ambitious strategy – called the Climate Smart Strategy - for reducing greenhouse gas emissions that necessitates a significant expansion of transit service.

The upcoming RTP Call for Projects (which will result in updates to the projects and programs in the RTP) is an opportunity to follow through on those plans and actions and more recent regional policy commitments adopted by JPACT and the Metro Council. These commitments include the more recent Regional Flexible Funds allocation decision to advance three priority bottleneck projects (I-5/Rose Quarter, OR 217, and I-205/Abernethy Bridge), two priority transit projects (the Southwest Corridor and Division Transit projects), and active transportation project development work to accelerate construction of active transportation projects in the region. These priorities were reaffirmed by JPACT through adoption of the region's 2017 Regional Policy and Funding Priorities for State Transportation Legislation on February 16.¹

Collectively, these actions will serve as a starting point for identifying investment priorities to be included in the draft 2018 RTP Investment Strategy.

Federal and State context

Additionally, the federal government completed rulemaking to implement two federal transportation bills with a new emphasis on outcomes, system performance, and transparency and accountability in the transportation decision-making process. In 2016, a Governor-appointed task force work conducted a series of forums to identify statewide transportation priorities. In 2017, the State of Oregon is likely to unveil a new transportation funding bill that would set state investment priorities for the next several years.

Nonetheless, federal and state funding is on the decline while the need for transportation investments in the Portland region continues to grow. The adopted 2014 RTP includes more than 1,250 projects, with a total estimated cost of \$36 billion, including maintenance and operations of the transportation system. That cost is significantly more than our region's current spending on transportation investments, the majority of which is being spent on maintenance and operations.

In the past, a generous federal match, significant state funding, and more flexibility at the local level meant that the financing for previous projects was more straightforward. Conditions have changed and future investments will likely require voter approval. This requires the region to take a different approach to identifying investment priorities, communicating about them, and bringing them forward in a transparent manner focused on explaining to stakeholders and the

¹ The Metro Council will consider adoption of the 2017 Legislative Priorities in March.

public the benefits they can expect from a project as well as the overall 2018 RTP Investment Strategy, whether it will individually benefit from them or not.

Building the 2018 RTP Investment Strategy – Call for Projects

The changing landscape of transportation funding and policy highlights the need for the region to review its priorities, be strategic, and make refinements to near and long-term investments identified to address regional transportation challenges. To this end, the 2018 RTP Call for Projects provides an opportunity to develop an updated strategy for how the region will leverage local, regional, state, federal funds to advance regional priorities as part of an existing public process – and, in effect, build a pipeline of regional transportation priorities.

Consistent with the adopted work plan, two levels of investment will be assumed for the 2018 RTP Investment Strategy. The first level, the *Constrained Priorities* (also known as the Financially Constrained project list under federal law), will represent the highest priority transportation investments for the plan period. In order for projects to be eligible to receive federal and state funding, they must be on the *Constrained Priorities* project list. The second level, the *Additional Priorities*, will represent other priority investments that the region agrees to work together to fund and construct. The 2018 RTP Investment Strategy will be comprised of the *Constrained Priorities* project list and the *Additional Priorities* project list.

The purpose of the upcoming “call for projects” is three-fold:

1. **Develop a pipeline of priority projects on the regional transportation system** that are desired to support the 2040 Growth Concept vision and regional transportation goals, and will need some combination of local, regional, state, and/or federal funding to be constructed.
2. Provide an opportunity for regional partners to identify priorities for the regional transportation system and refinements needed to **update current Constrained priorities (adopted as the 2014 RTP Financially Constrained System in 2014)** to respond to local, regional and state planning efforts completed since July 2014 and more recent JPACT and Council policy direction.
3. Provide an opportunity for regional partners to **identify additional priorities to include in the 2018 RTP Investment Strategy** that the region agrees to work together to fund and construct.

NEXT STEPS

Metro staff will complete technical work to support the solicitation process and continue working with TPAC and MTAC on policy-related elements of the update that will inform the project solicitation process.

Remaining technical work to support building the RTP Investment Strategy include:

1. **Updated financially constrained revenue forecast** to reflect a realistic outlook of the amount of local, state and federal transportation funding that is expected to be available from 2018 to 2040. The forecast will help illustrate the region’s transportation current funding outlook and support regional discussions to identify potential funding tools and build broad support for more funding and the region’s investment priorities;

2. **Development of on-line application system** that includes resources and tools to support project sponsors; and
3. **Updated the 2014 RTP project and program database** to remove projects completed or constructed since 2014. **Attachment 1** lists the projects completed since 2014.

In addition, staff identified projects that are not eligible to be included in the 2018 RTP at this time: (1) projects located on facilities off the designated regional system, (2) projects with an estimated cost less than \$1 million; and (3) projects located outside of the Metropolitan Planning Organization (MPO) planning area boundary. **Attachment 2** lists the projects for reference. For projects located off the regional system (as defined by the RTP System maps (<http://gis.oregonmetro.gov/rtp>)), project sponsors should review whether an amendment to an RTP system map is warranted. If warranted, a project sponsor must request this amendment as part of the Call for Projects process.

Policy-related elements being developed for review and discussion by the Metro Council, MPAC and JPACT in April and May to support the Call for Projects:

1. **Update Vision.** An updated vision statement for the RTP that reflects feedback from the Dec. 2 Regional Leadership Forum is under development.
2. **Updated Outcomes-based Evaluation Framework.** New and updated system performance and transportation equity analysis measures have been identified for testing during modeling and analysis of the draft 2018 RTP Investment Strategy. The measures will evaluate performance of the strategy as a whole. Staff will continue working with TPAC and MTAC to define project evaluation criteria to complement the planned system performance evaluation and transportation equity analysis.
3. **Updates on the Regional Transit Strategy and the regional safety and freight plans.**
4. **2018 RTP Investment Strategy Funding Level.** Possible approaches for setting the overall funding level for 2018 RTP Investment Strategy and identifying regional priorities to be recommended in the draft "Additional Priorities" list.

The schedule of next steps follows.

Schedule for regional discussion of Building the RTP Investment Strategy

March 2017	<ul style="list-style-type: none"> • Technical Workshop #1 with RTP work groups, TPAC and MTAC on project evaluation criteria (3/13/17; 1 to 4 PM at Metro in the council chamber) • TPAC and MTAC discussions on vision, project evaluation criteria and 2018 RTP Investment Strategy funding level • Coordinating Committee briefings (TACs)
April 2017	<ul style="list-style-type: none"> • Technical Workshop #2 with RTP work groups, TPAC and MTAC (4/14/17; 9 to 11 AM at Metro in the council chamber) • Coordinating Committee briefings (Policy and TACs) • JPACT, MPAC and Metro Council discussions • MTAC and TPAC recommendations to MPAC and JPACT, respectively
May 2017	<ul style="list-style-type: none"> • MPAC and JPACT recommendations to Council • Metro Council action
June 1, 2017	<ul style="list-style-type: none"> • RTP Call for Projects issued
July 21, 2017	<ul style="list-style-type: none"> • 2018 RTP Investment Strategy submittals due to Metro
July to Oct. 2017	<ul style="list-style-type: none"> • RTP technical evaluation process
Nov. 2017	<ul style="list-style-type: none"> • Release RTP Findings & Recommendations Report for regional discussion • Release technical review drafts of Safety, Freight and Transit plans for TPAC and MTAC review
Dec.2017 to April 2018	<ul style="list-style-type: none"> • Regional Leadership Forum #4 (12/8 or 12/15/17) to discuss findings and recommendations • Regional policy discussion to finalize refinements to 2018 RTP Investment Strategy based on technical evaluation, public input, and funding
April 2 to May 17, 2018	<ul style="list-style-type: none"> • Release public review draft RTP, needed Regional Framework Plan and Functional Plan amendments, and public review draft modal/topic plans for 45-day comment period & hearings
July 2018	<ul style="list-style-type: none"> • Convene Regional Leadership Forum #5
Sept./Oct. 2018	<ul style="list-style-type: none"> • MPAC and JPACT recommendations to Council on 2018 RTP and modal/topical plans
Dec. 2018	<ul style="list-style-type: none"> • Council action on 2018 RTP and Regional Transit Strategy, updated Regional Freight Plan, and updated Regional Safety Plan
Early 2019	<ul style="list-style-type: none"> • Submit 2018 RTP to US DOT and LCDC for federal and state review

/Attachments

1. RTP Call For Projects Background Information (2/24/17)
2. 2014 RTP Project and Program Database Information
 - a. 2014 RTP Projects With a Cost of Less than \$1 million
Note: These projects are not eligible to be included in the 2018 RTP unless bundled with other similar projects to meet the \$1 million cost threshold.
 - b. 2014 RTP Projects Not located on the designated Regional Transportation System as defined by the RTP System Maps
Note: These projects are not eligible for the 2018 RTP unless accompanied with a formal request for an amendment to the appropriate RTP System Map(s) and concurrence with Metro staff that the change requested is consistent with RTP policies.