
Thursday, May 17, 2017

7:30 AM – 9:00 AM

Development Service Building

Main Floor Auditorium, Room 115

150 Beaver Creek Road, Oregon City, OR 97045

Agenda

7:30 a.m. Welcome & Introductions

7:35 a.m. MPAC and JPACT Issues

- *Building the RTP Investment Strategy*

8:45 p.m. Other Issues

- **R1ACT Clackamas Urban City Seat Discussion**
- **(Informational) Upcoming US Army Corps of Engineers Public Comment Period re Willamette Falls Locks Disposition Study**

9:00 a.m. Adjourn

Attachments:	JPACT/MPAC Work Programs	Page 02
	Staff Memo Detailing Discussion Items	Page 06
	MTIP Bonding Comparisons	Page 31
	R1ACT Appointment Schedule	Page 32
	Willamette Falls Locks Materials	Page 33



2017 JPACT Work Program

As of 5/9/17

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

<p><u>May 18, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Resolution No. 17-4798, For the Purpose of Amending the 2015-18 Metropolitan Transportation Improvement Program (MTIP) to Modify and/or Add New Projects as Part of the April 2017 Formal MTIP Amendment (AP17-04-Apr) Involving a Total of Twenty-Eight Affected Projects for Beaverton, Metro, Multnomah County, Portland, ODOT, TriMet, and Wilsonville (consent) • Resolution No. 17-4800, For the Purpose of Approving a Multi-Year Commitment of Regional Flexible Funds for the Years 2019-31, Funding the Division Transit Project, the Southwest Corridor Transit Project, and Authorizing the Execution of an Intergovernmental Agreement with TriMet Regarding the Multi-Year Commitment of Regional Flexible Funds – Recommendation (Elissa Gertler/Ted Leybold, Metro; 15 min) • Powell-Division Transit LPA and RTP Amendment – Recommendation (Elizabeth Mros-O’Hara, Metro; 10 min) • Recommended Additions to the National Highway Freight Network – Recommendation (Tim Collins, Metro; 10 min) • 2018 RTP Update: Building the RTP Investment Strategy – Recommendation (Kim Ellis, Metro; 35 min) 	<p><u>June 15, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Finding and Recommendations from Southwest Washington Regional Transportation Council’s Bus on Shoulder (BOS) Feasibility Study – Information/Discussion (Bob Hart, SW Washington Regional Transportation Council (SWRTC) and Jeff Hamm (C-Tran) 10 min) • Comments on US Army Corps of Engineers Final Disposition Study for Willamette Falls Locks (Andy Cotugno, Metro/Trent Wilson, Clackamas County; 15 min) • 2018-2021 Metropolitan Transportation Improvement Program (MTIP) – Information/Discussion (Ted Leybold/Grace Cho, Metro; 10 min) • 2018 RTP: Regional Transit Strategy – Information/Discussion (Jamie Snook, Metro; 20 min) • 2018 RTP: Regional Freight Plan Update – Information/Discussion (Tim Collins, Metro; 20 min) <p><u>June 22-23: JPACT L.A. Trip</u></p>
<p><u>July 20, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018 RTP: Digital Mobility (Tyler Frisbee, Metro; TBD) • 2018-2021 Metropolitan Transportation Improvement Program (MTIP) – Recommendation (Ted Leybold /Grace Cho, Metro; 15 min) 	<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) • 2018 RTP: Transportation Resiliency (Kim Ellis, Metro; TBD) 	<p><u>October 19, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • Regional Travel Options (RTO) Strategy Update – Information/Discussion (Kaempff, Metro; 10 min)
<p><u>November 16, 2017</u></p> <ul style="list-style-type: none"> • Chair comments TBD (5+ min) • 2018 RTP: Project Update (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)
- **February 2018:** RTP Regional Leadership Forum #4 (Drafting 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 5/1/17

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

<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; 20 min) • 2018 RTP Update: Building the RTP Investment Strategy – Recommendation (Ellis, Metro; 30 min) • 2018 RTP: Regional Freight Plan Update – Information/Discussion (Tim Collins, Metro; 30 min) 	<p><u>Wednesday, May 24, 2017</u></p> <ul style="list-style-type: none"> • <i>2018 RTP: Regional Transit Strategy – Information/Discussion (Jamie Snook, Metro; 30 min)</i> <p>Eco-Industrial Strategies and Lessons Learned from Gresham Vista Business Park – Information/Discussion (Shannon Stadey, City of Gresham/Ken Anderton, Port of Portland; 30 min)</p>
<p><u>Wednesday, June 14, 2017</u></p>	<p><u>Wednesday, June 28, 2017</u></p> <ul style="list-style-type: none"> • Legislative Session Recap – Information/Discussion (Randy Tucker, Metro; 20 min) • <i>Update on Metro’s Build Small Coalition and PSU’s Institute for Sustainable Solution’s ADU Pilot Program (Emily Lieb, Metro/Robert Liberty, PSU; 45 min)</i> <p><i>Update on Equitable Housing Grant Project Scopes (Emily Lieb, Metro; 30 min)</i></p>
<p><u>Wednesday, July 12, 2017</u></p>	<p><u>Wednesday, July 26, 2017</u></p> <ul style="list-style-type: none"> • <i>2018 RTP: Digital Mobility (Tyler Frisbee, Metro; TBD)</i> • <i>2018 RTP: Resilience (Kim Ellis, Metro; TBD)</i>
<p><u>Wednesday, August 9, 2017</u></p> <p>Regional Business Food Scraps Policy Update (Jennifer Erickson/Pam Peck, Metro; 30 min)</p>	<p><u>Wednesday, August 23, 2017</u> – cancelled</p>

<u>Wednesday, August 23, 2017 - cancelled</u>	<u>Wednesday, September 27, 2017</u>
<u>Wednesday, October 11, 2017</u>	<u>Wednesday, October 25, 2017</u>
<u>Wednesday, November 8, 2017</u>	<u>Wednesday, November 22, 2017 - cancelled</u>
<u>Wednesday, December 13, 2017</u>	<u>Wednesday, December 27, 2017 - cancelled</u>

Upcoming events:

- February 2017: RTP Regional Leadership Forum #4 (Drafting 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
- Economic Value Atlas
- Affordable housing grants

C4 Metro Subcommittee Staff Memo

**Re: JPACT Item 5.1 Regional Flexible Funds and Item 5.4 Building the RTP
Investment Strategy**

Date: May 11, 2017

Summary

There are two items the C4 Metro subcommittee will discuss in preparation for the May 18th JPACT meeting. The attached materials include the staff reports from Metro on these two items.

The purpose of the discussion is to familiarize the C4 Metro Subcommittee members with these issues and to answer questions they may have on the information.

For additional information, please contact:

Steve Williams, Principal Transportation Planner



Agenda

Meeting: Joint Policy Advisory Committee on Transportation (JPACT)
 Date: Thursday, May 18, 2017
 Time: 7:30 to 9:00 a.m.
 Place: Metro Regional Center, Council Chamber

- | | | | |
|----------------|-----------|---|---|
| 7:30 AM | 1. | CALL TO ORDER, DECLARATION OF A QUORUM & INTRODUCTIONS | Craig Dirksen, Chair |
| 7:35 AM | 2. | CITIZEN COMMUNICATIONS ON JPACT ITEMS | |
| 7:40 AM | 3. | UPDATES FROM THE CHAIR & COMMITTEE MEMBERS | Craig Dirksen, Chair |
| 7:45 AM | 4. | <u>CONSENT AGENDA</u> | |
| | 4.1 | * Consideration of the April 20, 2017 Minutes | |
| | 4.2 | * Resolution No. 17-4798 , For the Purpose of Amending the 2015-18 Metropolitan Transportation Improvement Program (MTIP) to Modify and/or Add New Projects as Part of the April 2017 Formal MTIP Amendment (AP17-04-Apr) Involving a Total of Twenty-Eight Affected Projects for Beaverton, Metro, Multnomah County, Portland, ODOT, TriMet, and Wilsonville – <u>RECOMMENDATION TO METRO COUNCIL</u> | |
| | 5. | <u>ACTION ITEMS</u> | |
| 7:50 AM | 5.1 | * Resolution No. 17-4800 , For the Purpose of Approving a Multi-Year Commitment of Regional Flexible Funds for the Years 2019-31, Funding the Division Transit Project, the Southwest Corridor Transit Project, and Authorizing the Execution of an Intergovernmental Agreement with TriMet Regarding the Multi-Year Commitment of Regional Flexible Funds – <u>RECOMMENDATION TO METRO COUNCIL</u> | Elissa Gertler, Metro
Ted Leybold, Metro |
| 8:05 AM | 5.2 | * Powell-Division Transit LPA and RTP Amendment – <u>RECOMMENDATION TO METRO COUNCIL</u> | Elizabeth Mros-O’Hara,
Metro |
| 8:15 AM | 5.3 | * Recommended Additions to the National Highway Freight Network – <u>RECOMMENDATION TO METRO COUNCIL</u> | Tim Collins, Metro |
| 8:25 AM | 5.4 | * 2018 RTP Update: Building the RTP Investment Strategy – <u>RECOMMENDATION TO METRO COUNCIL</u> | Kim Ellis, Metro |
| 9:00 AM | 6. | ADJOURN | Craig Dirksen, Chair |

* Material available electronically # Material available at the meeting

Upcoming JPACT Meetings:

- Thursday, June 15, 2017
- Thursday, July 20, 2017
- Thursday, August 17, 2017

For agenda and schedule information, contact Nellie Papsdorf: 503-797-1916 or nellie.papsdorf@oregonmetro.gov.
To check on closure or cancellations during inclement weather please call 503-797-1700.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING A MULTI-)
YEAR COMMITMENT OF REGIONAL)
FLEXIBLE FUNDS FOR THE YEARS 2019-31,)
FUNDING THE DIVISION TRANSIT PROJECT,)
THE SOUTHWEST CORRIDOR TRANSIT)
PROJECT, ARTERIAL BOTTLENECK)
PROJECTS, AND ACTIVE TRANSPORTATION)
PROJECTS, AND AUTHORIZING EXECUTION)
OF AN INTERGOVERNMENTAL AGREEMENT)
WITH TRIMET REGARDING THE MULTI-)
YEAR COMMITMENT OF REGIONAL)
FLEXIBLE FUNDS)

RESOLUTION NO. 17-4800
Introduced by Chief Operating Officer Martha
Bennett in concurrence with Council
President Tom Hughes

WHEREAS, Metro is the Metropolitan Planning Organization (MPO) for the Portland metropolitan region, authorized by the U.S. Department of Transportation to program federal transportation funds in the Portland region through the Metropolitan Transportation Improvement Program (MTIP);

WHEREAS, Metro is authorized by the Oregon Department of Transportation (ODOT) to program federal Congestion Mitigation/Air Quality (CMAQ) funds in the MTIP that are allocated to the Portland region by ODOT;

WHEREAS, TriMet is the authorized public transportation provider for the Portland region and is an eligible recipient of federal transportation funds through the MTIP;

WHEREAS, on June 16, 2016, as recommended by JPACT, the Metro Council adopted Resolution No. 16-4702, “For the Purpose of Adopting the 2018-2021 Metropolitan Transportation Improvement Program and 2019-2021 Regional Flexible Funds Allocation Policy Statement for the Portland Metropolitan Area,” which resolution and policy statement sets forth how the region will identify and select transportation projects to receive federal transportation funds, including regional flexible funds and CMAQ funds (the “RFFA Policy Statement”);

WHEREAS, the RFFA Policy Statement supports committing federal transportation funds over years 2019-21 for the following purposes: (a) high-capacity transit regional bond commitments for the Division Street Transit Project and the Southwest Corridor Transit Project, (b) bond commitments for developing projects to address regional congestion bottlenecks and active transportation/Safe Routes to Schools projects, (c) region-wide programs, such as transit oriented development and corridor and systems planning, and (d) regional freight investments and active transportation/complete streets;

WHEREAS, ODOT has notified TriMet and Metro that Eugene and Salem are eligible for future allocations of the state’s share of federal CMAQ funds, which will potentially reduce CMAQ funds available to the Portland metropolitan region over the years 2019-21 (and in future years);

WHEREAS, any reduction in the amount of CMAQ funds allocated by ODOT to the Portland metropolitan region will reduce the amount of federal transportation funds used as the basis of the funding amounts set forth in RFFA Policy Statement;

WHEREAS, due to the uncertainty regarding any potential reduction in available federal transportation funds from the amounts assumed in the adopted RFFA Policy Statement and given the importance of TriMet's timely receipt of funds to keep project work on schedule, on May 18, 2017, the Joint Policy Advisory Committee on Transportation (JPACT) recommended approval of this Resolution 17-4800 and the reduced funding commitments shown in Exhibit A, and expressed an intent to potentially increase the amount of funding dedicated to these regionally important projects in the future up to the amounts included in the RFFA Policy Statement, following ODOT's decision regarding statewide allocation of the CMAQ funds;

WHEREAS, TriMet anticipates issuing revenue bonds secured by the commitment of federal transportation funds set forth on Exhibit A, and an agreement between Metro and TriMet regarding these funds will facilitate borrowing by TriMet that pledges these funds; now therefore

BE IT RESOLVED that the Metro Council hereby:

- Approves the commitment of federal transportation funds recommended by JPACT and shown in Table 1 of Exhibit A; and
- Authorizes the execution of an intergovernmental agreement between Metro and TriMet, in a form approved by the Office of Metro Attorney and consistent with this Resolution, that incorporates the multi-year commitment of regional flexible funds shown in Table 1 of Exhibit A for the uses set forth in Table 2 of Exhibit A.

ADOPTED by the Metro Council this [insert date] day of May, 2017.

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

EXHIBIT A to Resolution 17-4800

Table 1: Multi-Year Commitment of MTIP Funds and Regional Flexible Funds to TriMet

Column:	A	B	C
Federal Fiscal Year	Sub-Total of MTIP Funds Committed under Res. Nos. 08-3942 and 10-4185	Sub-Total of Phase 1 Regional Flexible Funds Committed under Res. No. 17-4800	Grand Total of MTIP Funds and Phase 1 Regional Flexible Funds Committed to TriMet under Res. Nos. 08-3942, 10-4185, and 17-4800
2016	\$16,000,000		\$16,000,000
2017	\$16,000,000		\$16,000,000
2018	\$16,000,000		\$16,000,000
2019	\$16,000,000	\$3,250,000	\$19,250,000
2020	\$16,000,000	\$3,250,000	\$19,250,000
2021	\$16,000,000	\$3,250,000	\$19,250,000
2022	\$16,000,000	\$3,500,000	\$19,500,000
2023	\$16,000,000	\$3,500,000	\$19,500,000
2024	\$16,000,000	\$3,500,000	\$19,500,000
2025	\$16,000,000	\$3,500,000	\$19,500,000
2026	\$16,000,000	\$3,500,000	\$19,500,000
2027	\$16,000,000	\$3,500,000	\$19,500,000
2028		\$12,100,000	\$12,100,000
2029		\$12,100,000	\$12,100,000
2030		\$12,100,000	\$12,100,000
2031		\$12,100,000	\$12,100,000

Table 2: Bond Funded Projects and Net Project Funding

Project Activity	Amount
Southwest Corridor Transit Project	\$15,000,000
Division Transit Project	\$25,000,000
Project Development: Highway/Arterial	\$10,000,000
Active Transportation/Safe Routes to Schools	\$1,000,000
Enhanced Transit	-0-
Total	\$51,000,000

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 17-4800, FOR THE PURPOSE OF APPROVING A MULTI-YEAR COMMITMENT OF REGIONAL FLEXIBLE FUNDS FOR THE YEARS 2019-31, FUNDING THE DIVISION TRANSIT PROJECT, THE SOUTHWEST CORRIDOR TRANSIT PROJECT, ARTERIAL BOTTLENECK PROJECTS, AND ACTIVE TRANSPORTATION PROJECTS, AND AUTHORIZING EXECUTION OF AN INTERGOVERNMENTAL AGREEMENT WITH TRIMET REGARDING THE MULTI-YEAR COMMITMENT OF REGIONAL FLEXIBLE FUNDS

Date: May 5, 2017

Prepared by: Ted Leybold

BACKGROUND

In 2015, the region began discussions to update the policy for the next allocation of regional flexible funds and the creation of the 2018-21 Metropolitan Transportation Improvement Program (MTIP). The financial forecast at that time found that by holding funding levels for existing programs steady at past amounts (adjusting for inflation), there would be \$17.43 million of additional forecasted Regional Flexible Funds for the Portland metropolitan region under the FAST Act legislation. On June 16, 2016, the Metro Council approved Resolution No. 16-4702, establishing policy direction for the allocation of Regional Flexible Funds, with the intent to provide this additional forecasted revenue and a small portion of existing funding capacity to the Division Transit Project and project development work for the Southwest Corridor Transit Project, arterial bottleneck projects, and active transportation projects. Support of these projects was authorized to include a multi-year commitment of funding through 2034, to be bonded by TriMet to provide funding to these projects more immediately.

Metro was informed by the Oregon Department of Transportation (ODOT) that one source of the regional flexible funding, Congestion Mitigation/Air Quality (CMAQ) funds, would likely be reduced due to the new eligibility of the Salem and Eugene areas to receive these funds from the share allocated to the state of Oregon.

To address this uncertainty regarding any potential reduction in available federal transportation funds from the amounts assumed in the adopted RFFA Policy Statement and given the importance of TriMet's timely receipt of funds to keep project work on schedule, on May 18, 2017, the Joint Policy Advisory Committee on Transportation (JPACT) recommended approval of this Resolution 17-4800 and the reduced funding commitments shown in Exhibit A.

The purpose of this resolution is to authorize the Chief Operating Officer to enter into an intergovernmental agreement (IGA) between TriMet and Metro. In this agreement, Metro will provide a multi-year commitment of Regional Flexible Funds consistent with the schedule provided in Table 1 of Exhibit A to this resolution. The bond proceeds will be provided to the projects consistent with Table 2 of Exhibit A to this resolution.

JPACT and the Metro Council may increase the amount of funding dedicated to these regionally important projects in the future up to the amounts included in the RFFA Policy Statement, following ODOT's decision regarding statewide allocation of the CMAQ funds.

ANALYSIS/INFORMATION

1. **Known Opposition** None known at this time.
2. **Legal Antecedents** Metro has the authority to enter into an Intergovernmental agreement (IGA) with TriMet. Metro has previously executed these types of IGAs with TriMet, most recently to Provide Regional Flexible Funds for the Milwaukie Light Rail, Commuter Rail, Portland-Lake Oswego Transit, and Southwest Corridor, February 10, 2011. The IGA would implement policy direction provided in Resolution No. 16-4702, *“For the Purpose of Adopting the 2018-2021 Metropolitan Transportation Improvement Program and 2019-2021 Regional Flexible Funds Allocation Policy Statement for the Portland Metropolitan Area,”* June 16, 2016.
3. **Anticipated Effects** This resolution would authorize an IGA that would provide the mechanism to formalize the transfer of regional flexible fund dollars to TriMet for the funding of transportation projects specified in the agreement.
4. **Budget Impacts** Federal or state funding allocations less than forecasted levels may affect Metro’s ability to allocate regional flexible funds for Metro planning or transportation program activities. Additionally, Metro will be responsible for providing or collecting from partner agencies matching funds of approximately \$105,000 for project development activities for Active Transportation projects.

RECOMMENDED ACTION

Metro Council approve Resolution No. 17-4800.

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: May 10, 2017
To: Joint Policy Advisory Committee on Transportation (JPACT) and interested parties
From: Kim Ellis, RTP Project Manager
Subject: Building the 2018 RTP Investment Strategy – RECOMMENDATION TO METRO COUNCIL REQUESTED

PURPOSE

The purpose of this agenda item is to request JPACT's recommendation to the Metro Council on the process for updating and evaluating the region's near- and long-term investment priorities.

ACTION REQUESTED

On May 18, JPACT will be asked to consider the unanimous recommendation of the Transportation Policy Alternatives Committee (TPAC) and make a recommendation to the Metro Council. TPAC's recommendation to JPACT includes three parts:

- 1. RTP Policy Framework** (See *Attachments 1 and 2*)
 - Approve the revised vision statement.
 - Use the 2014 RTP Policy Framework and revised vision statement as starting point to guide building the draft RTP Investment Strategy.
 - Begin work to review and recommend refinements to the 2014 RTP policy framework. Recognizing this RTP update has an increased focus on addressing safety, equity and climate change, the current policy framework will be subject to further review and refinement to more fully address these and other issues of concern identified through the process (e.g., congestion, maintenance, emerging technologies and funding).
- 2. RTP Evaluation Framework** (See *Attachments 3 and 4*)
 - Test updated system performance and transportation equity measures through analysis of the draft RTP Investment Strategy.
 - Pilot project-level evaluation on projects anticipated to seek federal, state or regional funding.
 - Recommend refinements to the measures and project evaluation criteria for the final evaluation to address any deficiencies found during testing.
- 3. RTP Funding Framework** (*Attachment 5*)
 - Accept the draft financially constrained forecast for purposes of the Call for Projects.
 - Double the draft constrained revenue forecast to set an overall draft RTP Investment Strategy funding level for purposes of the Call for Projects.
 - Set sub-regional capital funding targets (based on above) for purposes of the Call for Projects.

The above recommendations acknowledge that all three parts are a starting point for purposes of building a draft RTP Investment Strategy and all three parts will be subject to refinement in 2017-18. In particular, the draft financially constrained forecast will need refinements in 2018 to reflect local, regional, federal and/or state funding discussions or actions that occur before the RTP and recommended investment strategy is finalized for adoption.

Building the 2018 RTP Investment Strategy – RECOMMENDATION TO METRO COUNCIL REQUESTED

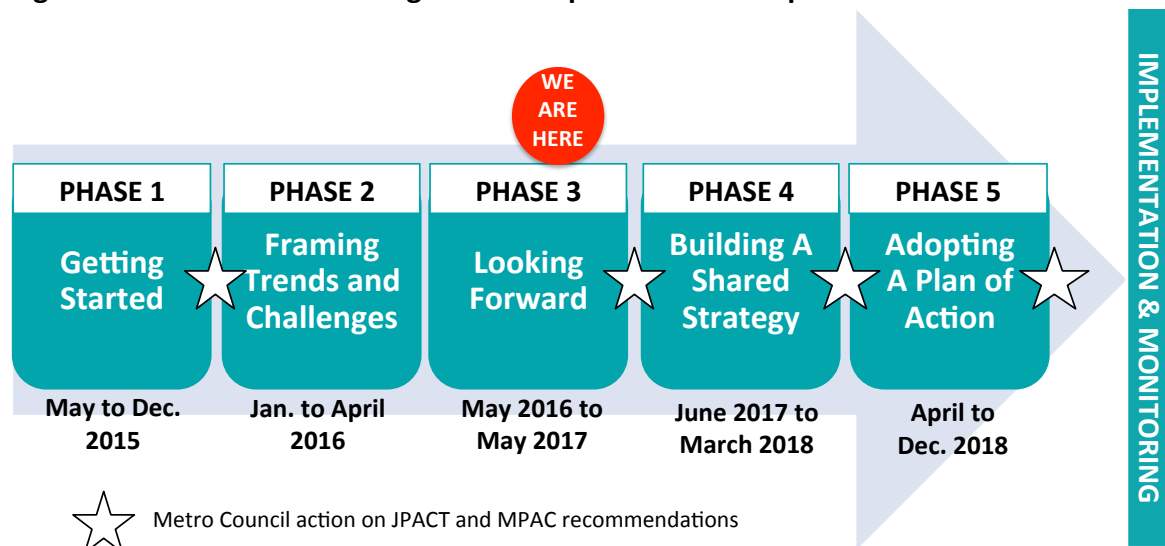
Pending Council action on recommendations from JPACT and the Metro Policy Advisory Committee (MPAC), Metro will issue a “call for projects” to update the region’s transportation near- and long-term investment priorities to support regional goals for safety, congestion relief, affordability, community livability, the economy, equity, and the environment on June 1, 2017. Project submittals will be due on July 21, 2017.

BACKGROUND

The Portland metropolitan region’s economic prosperity and quality of life depend on a transportation system that provides every person and business in the region with equitable access to safe, efficient, reliable, affordable and healthy travel options. Through the 2018 RTP update, the Metro Council is working with leaders and communities throughout the region to plan the transportation system of the future by updating the region’s shared transportation vision and investment strategy for the next 25 years.

Figure 1 shows where we are in the process.

Figure 1. Timeline for 2018 Regional Transportation Plan Update



In December 2016 and February 2017, Metro Council reaffirmed their direction to staff to use development of the 2018 RTP to clearly and realistically communicate our transportation funding outlook and support partner jurisdictions in planning for the future. This direction included developing a pipeline of priority projects for the regional transportation system that the region agrees to work together to fund and build. Council also directed the pipeline be developed in an efficient and transparent way that advances adopted regional goals, supports regional coalition building efforts, and emphasizes equity, safety and climate change in the region’s investment priorities and related modal and topical strategies.

THE OPPORTUNITY

Regional context - Past actions and policy direction

Much has changed in the region since 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 throughout the region. In addition, as the federal and state funding landscape has changed, the region is playing a more active role in funding and financing priority regional projects, which has significant implications for project development and prioritization.

The RTP provides the policy foundation and goals to guide defining a pipeline of regional investment priorities – called the RTP Investment Strategy. The upcoming Call for Projects will build a draft 2018 RTP Investment Strategy (resulting in updates to the projects and programs in the 2014 RTP), providing an opportunity to follow through on those plans and actions, fully implementing the adopted Climate Smart Strategy, and more recent regional policy commitments adopted by JPACT and the Metro Council.

These commitments include the 2019-21 Regional Flexible Funds Allocation decision to advance three priority bottleneck projects (I-5/Rose Quarter, OR 217, and I-205 widening – Ph. 1: I-205/Abernethy Bridge and Ph. 2: I-205 mainline), 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. JPACT and the Metro Council reaffirmed these policy priorities through adoption of the region’s 2017 Regional Policy and Funding Priorities for State Transportation Legislation on February 16 and March 2, respectively. Notably, a draft state transportation package to help fund these priorities is under development.

Federal and State context and implications for the 2018 RTP

Additionally, the federal government completed rulemaking to implement two federal transportation bills with a new emphasis on outcomes, system performance, 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, new state transportation funding bill is expected 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 public the benefits they can expect from a project as well as the overall 2018 RTP Investment Strategy.

Adopted RTP goals

1. Foster vibrant communities and efficient urban form
2. Sustain economic competitiveness and prosperity
3. Expand transportation choices
4. Emphasize effective and efficient management of the transportation system
5. Enhance safety and security
6. Promote environmental stewardship
7. Enhance human health
8. Demonstrate leadership on reducing greenhouse gas emissions
9. Ensure equity
10. Ensure fiscal stewardship
11. Deliver accountability

BUILDING THE 2018 RTP INVESTMENT STRATEGY

Call for Projects to build a draft investment strategy

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 local, regional and state priorities for the regional transportation system as part of an existing public process. In effect, the region will work together to define a pipeline of regional transportation projects to fund and construct to address regional challenges, reflect public priorities and maximize progress toward the region's shared vision and goals for the future transportation system.

Consistent with the adopted RTP 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 (2018-2040). 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 Strategic Priorities*** (also called Strategic Priorities), will represent additional priority investments that the region agrees to work together to fund and construct in the 2028-2040 time period.

The draft 2018 RTP Investment Strategy will be comprised of the Constrained Priorities project list and the Strategic Priorities project list.

In addition, consistent with previous Council direction, the upcoming "call for projects" will:

1. **Develop a pipeline of priority projects on the regional transportation system** that are needed to support the 2040 Growth Concept vision and adopted regional transportation goals, and will need some combination of local, regional, state, and/or federal funding to be constructed in the 2018-2040 time period.
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) for the 2018-2040 time period** to address to local, regional and state needs on the regional system as well as planning efforts completed since July 2014 and more recent JPACT and Council policy priorities.
3. Provide an opportunity for regional partners to **identify additional priorities to include in the more aspirational Strategic Priorities list for the 2028-2040 time period** that the region agrees to work together to fund and construct to address local, regional and state needs on the regional system.

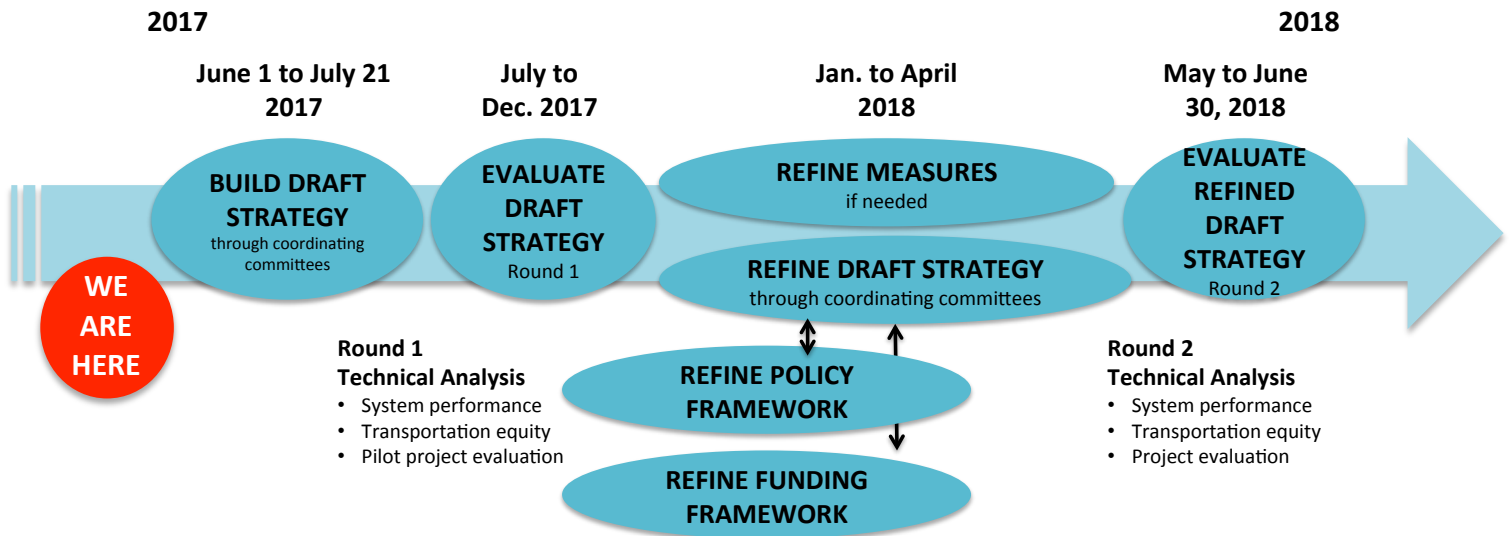
Regional transportation challenges

- Aging infrastructure
- Climate change and air quality
- Congestion and unreliable travel times
- Crashes and fatalities
- Earthquake vulnerability
- Gaps in transit, biking and walking connections
- Housing and transportation affordability and displacement
- Social inequity and disparities
- Technological changes

PROCESS FOR BUILDING, EVALUATING AND REFINING THE RTP INVESTMENT STRATEGY

The RTP Call for Projects is planned for June 1 to July 21, 2017 and will formally kick-off building the RTP Investment Strategy. The process for building, evaluating and refining the investment strategy is illustrated in **Figure 2**.

Figure 2. Overview of process for building the RTP Investment Strategy



Local jurisdictions and county coordinating committees will play the strongest role in determining what projects are put forward for inclusion in the plan in collaboration with ODOT, Metro and TriMet. Agencies will use the 2014 RTP Policy Framework, revised vision statement, draft constrained revenue forecast and capital funding targets for the draft Constrained Priorities project list and draft Full RTP Investment Strategy) as a starting point to guide development of the draft investment strategy.

After agencies determine and submit their priority projects staff will begin a technical analysis of proposed investments.

Evaluating and refining the draft RTP Investment Strategy

Evaluation of the RTP investment strategy is intended to provide policymakers with better information about the region’s investment priorities and the implications of our near-term and long-term transportation investment choices. The evaluation process will test new and updated outcomes-based system performance and transportation equity measures and pilot project criteria to determine which measures and criteria can best evaluate whether the transportation system is successful in meeting regional goals and policies.

Two rounds of evaluation are planned, allowing for refinement of the draft system performance and transportation equity analysis measures and draft project evaluation criteria to address any shortcomings identified during the Round 1 evaluation.

The Round 1 analysis will be conducted on a 2015 base year, 2040 No Build and three RTP investment strategy packages.

ROUND 1 ANALYSIS OVERVIEW

Base Year (2015) – Assumes the 2015 transportation network and 2015 socioeconomic (population, household, and employment) data.

No Build (2040) – Assumes the region continues to grow as forecasted by 2040¹, but no improvements are made to the existing transportation system other than those that are currently under construction.

RTP Investment Strategy Packages (analysis year)

Package 1 – Draft 10-year Constrained RTP investment Strategy (2027)

The region's highest priority projects given our current funding outlook (2018-2027 in Constrained project list).

This set of investments would be eligible to receive state and federal funding and serve as basis for demonstrating compliance with federal transportation planning and air quality requirements.

Package 2 – Draft Full Constrained RTP Investment Strategy (2040)

Package 1 + high priority projects given our current funding outlook (2028-2040 in Constrained project list).

This set of investments would be eligible to receive state and federal funding and serve as basis for demonstrating compliance with federal transportation planning and air quality requirements.

Package 3 – Draft Full RTP Investment Strategy (2040)

Full Constrained RTP + additional priority projects the region agrees to work together to pursue funding to plan and build (2028-2040 in Strategic project list).

This set of investments would be the basis for demonstrating compliance with statewide planning goals, the Transportation Planning Rule, and state mandated greenhouse gas emissions reduction requirements.

Note: The socioeconomic (population, household, and employment) data is the same for the No Build and RTP Investment Strategy Packages 2 and 3, looking out to the year 2040. Investment Strategy Package 1 uses socioeconomic data for the year 2027 for the analysis.

Safety, transit and freight strategies continue to be developed on parallel tracks and will be informed by the analysis findings and recommendations. The system performance and transportation equity analysis and policy updates will also inform refinements to the draft RTP investment strategy packages.

In Fall 2017 and early 2018, Metro will convene RTP work groups, TPAC and MTAC and work with technical coordinating committees to review draft regional findings and recommend changes to the RTP evaluation framework and RTP investment packages for JPACT, MPAC and the Metro Council consideration in 2018. In January 2018, the draft investment strategy packages submitted by agencies will be shared with the general public for input along with findings from the analysis.

While the technical analysis is underway, staff will review the existing policy framework to identify and recommend potential policy refinements for consideration by JPACT, MPAC and the Metro Council. In addition, state, regional, and local funding discussions will continue in 2017 and early 2018. The discussions will lead to a final financially constrained revenue forecast and agreement on potential funding options for the region to pursue to advance regional priorities.

¹ A 2040 regional household and employment growth forecast was prepared by Metro and reviewed by local governments to serve as the basis for the 2018 Regional Transportation Plan. The forecast was adopted by the

Findings and recommendations from the technical analysis (e.g., the system performance and transportation equity analysis), recommended policy changes, public input and updated funding information will be discussed by the Metro Council and regional policy advisory committees at a fourth Regional Leadership Forum. The forum is planned for February 2018 and will result in additional policy direction to staff on refining investment priorities (e.g., timing, constrained vs. strategic project lists, and overall size of the RTP Investment Strategy).

Based on the policy direction, the investment strategy packages will be updated by agencies for the final draft Regional Transportation Plan in April 2018. At that time, all capital projects greater than \$10 million in cost will apply the refined criteria, unless otherwise exempt. The final draft project list will undergo a second round of system performance and transportation equity analysis and a final round of agency and public input before JPACT and the Metro Council consider adoption in 2018.

As previously noted, both rounds of evaluation will inform development of the Regional Transit Strategy and updates to the Regional Transportation Safety Strategy and Regional Freight Strategy and recommended changes to the RTP policy framework. The second round of analysis will lead to recommendations on future regional corridor refinement planning and other studies and/or activities needed to address transportation challenges that cannot be resolved through the 2018 RTP update. More information on this will be provided for discussion at future meetings.

ACTIVITIES SINCE THE APRIL BRIEFING ON RTP

Since the last update to JPACT in April, staff continued to implement the adopted work plan and public engagement plan approved by JPACT and Council in 2015. A summary of accomplishments and activities that are underway follows.

- TPAC, MTAC and MPAC unanimously recommended approval of the updated vision statement and using the **2014 RTP Policy Framework, including vision statement, as a starting point for purposes of the call for projects** to guide building the draft RTP Investment Strategy. The RTP Policy Framework, including the recommended vision statement is provided in **Attachment 1**. The vision statement reflects feedback received at the Regional Leadership Forum held on December 2, 2016 and subsequent revisions recommended by MPAC, JPACT, TPAC and MTAC. Also part of the RTP Policy Framework, the regional transportation system definition and maps of each network are provided for reference in **Attachment 2**.

Recommended shared vision

In 2040, everyone in the Portland metropolitan region will share in a prosperous, equitable economy and exceptional quality of life sustained by a safe, reliable, healthy, and affordable transportation system with travel options.

Recognizing this RTP update has an increased focus on addressing safety, equity and climate change, the adopted work plan calls for the policy framework to be subject review and refinement to more fully address these and other issues of concern identified through the process (e.g., congestion, maintenance, emerging technologies and funding). TPAC recommended staff review and refine the RTP policy chapter, including:

- Review of RTP goals and objectives, particularly goals related to safety, equity, climate change, accountability, congestion, maintenance, emerging technologies and funding
- Review of performance targets to meet federal and state requirements

- Review of modal policies and maps, particularly the throughways/arterials, transit, and freight networks

From Sept. to Dec. 2017, staff will review the existing policy framework to identify and recommend potential refinements to the 2014 RTP policy framework for consideration by JPACT, MPAC and the Metro Council. The regional bike and pedestrian network policies will not be subject to this review because they were extensively reviewed and updated as part of the 2014 Regional Active Transportation Plan.

- TPAC, MTAC and MPAC unanimously recommended **testing the updated outcomes-based RTP Evaluation Framework, including the pilot project evaluation**, recognizing the evaluation framework will be subject to further refinement based on the analysis.

The updated system performance and transportation equity analysis measures recommended for further testing are summarized in **Attachment 3**. The pilot project evaluation process and draft criteria are summarized in **Attachment 4**. The framework includes updated and new system performance and transportation equity analysis measures that will be used to analyze the draft 2018 RTP Investment Strategy this summer. The measures will evaluate performance of the system as a whole for each investment strategy package.

The pilot project evaluation will focus on small number of larger-scale capital projects that are anticipated to seek federal, state or regional funding. Smaller-scale capital projects (costing less than \$10 million) and projects that are anticipated to be 100 percent locally funded would be excluded from the pilot. The project-level criteria, developed based on the adopted RTP goals and objectives, will be tested and refined during the first Call for Projects. For the pilot phase, the city of Portland, ODOT, TriMet, the Port of Portland and each county will be asked to apply the criteria to at least five of their respective project submittals. All other agencies will be asked to apply the criteria to at least one of their respective project submittals. During the second Call for Projects in Spring 2018, all capital projects over \$10 million will be evaluated, unless exempted as outlined in the criteria.

The RTP evaluation framework reflects extensive feedback provided by the RTP work groups, regional technical committees and interested partners, and will be subject to further refinement in 2017-18 to address any issues identified during testing.

- TPAC recommended JPACT **accept the draft RTP financially constrained revenue forecast and double the draft constrained revenue forecast to set an overall funding level for the RTP Investment Strategy for purposes of the Call for Projects**. The draft forecast shown in **Attachment 5** reflects extensive consultation and coordination with local governments, ODOT, TriMet and SMART staff that is still underway. Development of the draft forecast found that a significant portion of the revenues available are spent on maintaining the existing transportation system and the purchasing power of revenues continues to be eroded because the fuel tax is not indexed to inflation and increasing fuel efficiency of vehicles.



Updated RTP Evaluation Framework
advances how we measure outcomes to
inform priorities

While still being developed for purposes of the Call for Projects, the preliminary draft forecast reflects a realistic outlook of the amount of local, state and federal transportation funding that is expected to be available for capital projects from 2018 to 2040, reflecting a 13 percent reduction from the 2014 RTP constrained forecast and a 6 percent reduction from the full 2014 RTP.² An implication of the updated forecast is that the overall draft RTP Investment Strategy would have fewer locally funded capital projects on regional transportation system than the current 2014 RTP, for the reasons stated previously and because the majority of local revenues are being spent on maintaining the existing system.

Local revenues came from local TSPs and capital improvement programs in consultation with local partners. The federal and state revenues were identified through a statewide funding working group ODOT convened that included transit providers and MPOs.

TPAC's recommendation reflects that despite having less funding available, the region continues to significant transportation needs that if left unaddressed, threaten the region's economic prosperity and quality of life. TPAC's recommendation acknowledges that the draft forecast is preliminary for the Call for Projects and will need to be updated in 2018 to reflect local, regional, federal and/or state funding discussions or actions that occur before the RTP is finalized for adoption. Right now, regional discussions are focused on the anticipated state transportation package and advancing the three bottlenecks, the Southwest Corridor, the Division Transit Project and some to be determined active transportation projects. Additional regional discussions are anticipated to identify what the region would like to do locally and regionally to build a path to future funding opportunities to fund and build the investment strategy that is recommended in the final 2018 RTP. The draft forecast will inform these discussions. The outcome of the discussions and state legislative package will inform refinements to the RTP Funding Framework in 2018, including the overall size of the RTP Investment Strategy.

- Staff continued **development of the Regional Transit Strategy and updates to the regional safety and freight plans**. An update on the Regional Transportation Safety Strategy was presented at the Metro Council, MPAC and JPACT – resulting in all three policy bodies supporting a Vision Zero safety goal for the 2018 RTP and updated Regional Transportation Safety Strategy. In addition, at the Metro Council work sessions on the safety strategy and transit strategy, the Council expressed a desire for an emphasis on equity, safety and climate change as the process moves forward to update the region's investment priorities and related modal and topical strategies. Updates on the Regional Transit Strategy and Regional Freight Strategy will be presented at the June JPACT meeting.
- Staff continued preparing **materials to support the 2018 RTP Call for Projects** that is planned from June 1 to July 21, 2017. The materials will include: the RTP Policy Framework, the RTP Evaluation Framework, jurisdictional capital funding targets for the Constrained Priorities and Strategic Priorities³, and instructions for how agencies coordinate and submit updates to existing RTP projects and programs to address local, regional and state transportation needs on the regional transportation system. Examples of the types of investments that will address regional transportation challenges are summarized in **Attachment 6**. **Attachment 7** provides more details on the coordination, evaluation and refinement process. A web page and on-line

² These revenue comparisons do not include the funding assumptions adopted in the 2014 RTP for I-5 Bridge Replacement.

³ The funding targets will reflect the draft financially constrained forecast and the overall RTP Investment Strategy funding level recommended by JPACT and the Council.

project database will support jurisdictions as they update their investment priorities at www.oregonmetro.gov/2018PROJECTS. *Note: the web page is under development.*

- Staff completed a summary report of the responses received during an **online comment opportunity for the 2018 RTP** update from March 3 through 28, 2017. A summary was provided to JPACT at the April meeting. The full report is available on the project website at www.oregonmetro.gov/rtp. The survey had two questions asking the public to weigh in on near-term investment priorities and level of support for increasing transportation funding to meet our needs. More than 2,600 people responded. The responses reinforce what we've heard in past engagement activities, including the regional leadership forums.

The public and community and business leaders want the region to prioritize three things:

- Keeping our existing system in good repair
- Improving safety for all users
- Implementing a mix of investments that together keep people and communities connected and commerce moving in ways that provide a good return on investment. This means multi-modal projects that address growing congestion, safeguard our environment, keep our air clean, reduce greenhouse gas emissions, and improve access to our ports, industrial areas, job centers and other opportunities.

NEXT STEPS

JPACT will be requested to make recommendations to the Metro Council on May 18. The Metro Council is scheduled to consider the recommendations from MPAC and JPACT on May 30.

Pending Council action on recommendations from JPACT and the Metro Policy Advisory Committee (MPAC), Metro will issue a "call for projects" to update the region's transportation near- and long-term investment priorities to support regional goals for safety, congestion relief, affordability, community livability, the economy, equity, and the environment on June 1, 2017. Project submittals will be due on July 21, 2017.

/Attachments

- **Attachment 1.** 2014 RTP Policy Framework, including updated 2018 RTP vision statement (5/3/17)
- **Attachment 2.** Regional Transportation System Definition and Network Maps (*excerpt from 2014 RTP, adopted July 2014*)
- **Attachment 3.** Draft system performance and transportation equity analysis measures recommended for testing (4/10/17)
- **Attachment 4.** Pilot project evaluation proposed for testing (4/24/17)
- **Attachment 5.** Draft 2018 RTP Financially Constrained Capital Revenue Forecast (5/10/17)
- **Attachment 6.** Investments for addressing our regional transportation challenges (5/9/17)
- **Attachment 7.** Summary of Coordination, Evaluation and Refinement Activities | June 1, 2017 to June 30, 2018 (5/10/17)
- **Attachment 8.** Schedule and Timeline for Building 2018 RTP Investment Strategy (4/10/17)
- **Attachment 9.** RTP Timeline (5/10/17)

PRELIMINARY DRAFT 2018 RTP FINANCIALLY CONSTRAINED CAPITAL REVENUE FORECAST – STARTING POINT FOR CALL FOR PROJECTS

This document summarizes the preliminary draft financially constrained capital revenue forecast for the period 2018 to 2040 and sub-regional funding targets recommended by TPAC for purposes of the Call for Projects.

TPAC recommended JPACT accept the draft RTP financially constrained revenue forecast and double the draft constrained revenue forecast to set an overall funding level for the RTP Investment Strategy for purposes of the Call for Projects. The draft RTP financially constrained revenue forecast was developed through extensive consultation and coordination with local governments, ODOT, TriMet and SMART staff that is still underway. While still being developed for purposes of the Call for Projects, the preliminary draft forecast shown in **Table 1** reflects a realistic outlook of the amount of local, state and federal transportation funding that is expected to be available from 2018 to 2040.

Table 1. PRELIMINARY DRAFT 2018 RTP Financially Constrained Revenue Forecast for 2018 to 2040 for Purposes of the RTP Call for Projects

Capital only in rounded billions of 2016 dollars - *Subject to change pending further agency review*

Revenue Source	2018-2027	2028-2040	Constrained Capital Revenues Total
Local sources			
City of Portland	\$0.37	\$0.48	\$0.85
Clackamas County and cities	\$0.26	\$0.35	\$0.61
Multnomah County and cities	\$0.13	\$0.16	\$0.29
Washington County and cities	\$0.87	\$1.10	\$1.97
Port of Portland	<i>Under development – to be determined</i>		
Federal and state sources			
To ODOT projects*	\$0.67	\$0.85	\$1.52
Federal Transit New Starts/Small Starts**	\$1.40	\$1.40	\$2.80
State match to high capacity transit (HCT) projects**	\$0.56	\$0.56	\$1.12
Regional Flexible Fund Allocation HCT Bonding	\$0.11	\$0.00	\$0.11
Discretionary sources available for regional/local projects***	\$0.18	\$0.43	\$0.61
Regional sources			
Regional funding measure	<i>Under discussion – to be determined</i>		
Total	\$4.55 billion	\$5.33 billion	\$9.88 billion

Notes:

- * This includes \$1 billion identified in draft statewide transportation package to advance three priority bottleneck projects in the Portland region (I-5/Rose Quarter, OR 217, and I-205 widening – Ph. 1: I-205/Abernethy Bridge and Ph. 2: I-205 mainline).
- ** Federal and state revenues to HCT is a maximum available threshold. Actual revenues will be adjusted based on projects identified during the planning process, their costs, and the ability to identify local and/or regional revenues to meet funding match requirements.
- *** Revenue sources include: Congestion Mitigation Air Quality Program, Surface Transportation Block Grant, TIGER, FASTLANE, Federal bridge and safety programs and *ConnectOregon* (bike and pedestrian projects).

Table 2 summarizes TPAC’s recommendation to set sub-regional capital funding targets (based on the draft constrained forecast and doubling the draft constrained revenue forecast to set an overall funding level for the RTP Investment Strategy) for purposes of the Call for Projects. The draft targets will be adjusted, as needed, by June 1 to reflect any updates to the draft forecast identified during the agency review.

Table 2. PRELIMINARY DRAFT Sub-Regional Capital Funding Targets for Purposes of the RTP Call for Projects
Capital only in rounded billions of 2016 dollars - *Subject to change pending further agency review of draft constrained forecast*

Agency/ Coordinating Committee	CONSTRAINED Capital Funding Target 2018 – 2040	TOTAL Capital Funding Target 2018-2040
ODOT	\$1.52	\$3.04
TriMet	\$4.03	\$8.06
City of Portland	\$1.04	\$2.08
Clackamas County & cities	\$0.71	\$1.42
Multnomah County & cities	\$0.44	\$0.88
Washington County & cities	\$2.14	\$4.28
Port of Portland	under development	under development
TOTAL	\$9.88 BILLION	\$19.76 BILLION

The draft forecast is subject to change pending further agency review by June 1 and will need additional refinements in 2018 to reflect local, regional, federal and/or state funding discussions or actions that occur before the RTP is finalized for adoption. Right now, regional discussions are focused on the anticipated state transportation package and advancing the three bottlenecks, the Southwest Corridor, the Division Transit Project and some to be determined active transportation projects. Additional regional discussions are anticipated to identify what the region would like to do locally and regionally to build a path to future funding opportunities so the region can fund and build the investment strategy that is recommended in the final 2018 RTP. The preliminary draft capital forecast and preliminary draft overall funding level shown in Table 2 along with evaluation of the investment priorities identified by agencies during the Call for Projects and public input will inform the discussions. The outcome of the discussions and state legislative package will lead to refinements to the RTP Funding Framework in 2018 to finalize the RTP constrained forecast to meet federal requirements and set the overall size of the RTP Investment Strategy to meet state requirements, including required greenhouse gas emissions reductions.

Building the RTP Investment Strategy

Summary of coordination, evaluation and refinement activities | June 1, 2017 to June 30, 2018

2017

2018

June 1 to July 21
2017

July to
Dec. 2017

Jan. to April
2018

May to June
30, 2018

**BUILD DRAFT
STRATEGY**
through coordinating
committees

**EVALUATE
DRAFT
STRATEGY**
Round 1

REFINE MEASURES
if needed

REFINE DRAFT STRATEGY
through coordinating
committees

**EVALUATE
REFINED
DRAFT
STRATEGY**
Round 2

Round 1

Technical Analysis

- System performance
- Transportation equity
- Pilot project evaluation

**REFINE POLICY
FRAMEWORK**

**REFINE FUNDING
FRAMEWORK**

Round 2

Technical Analysis

- System performance
- Transportation equity
- Project evaluation



2018 Regional Transportation Plan

Schedule and timeline for Building the 2018 RTP Investment Strategy

June 1, 2017	Call for Projects released
July 21, 2017	Agencies submit projects and information by 5 p.m.
July-October 2017	RTP Technical Evaluation Process (Round 1)
Aug. 2017	Metro reviews submittals for completeness and compiles draft project lists for TPAC and MTAC review
Aug. 25, 2017	Agencies submit project endorsements from governing bodies by 5 p.m.
Nov. – Dec. 2017	Draft RTP Findings & Recommendations Report released for technical review by TPAC, MTAC, RTP work groups and technical coordinating committees to discuss findings and deficiencies, and recommend changes, if any, that are needed. The technical discussions will inform materials being prepared for discussion by the Metro Council and regional policy advisory committees, through an on-line comment opportunity and at the Regional Leadership Forum 4. Metro provides corridor-level and other technical evaluation information to agencies and coordinating committees to use to inform potential refinements to projects in Spring 2018 Coordinating committees prepare to refine project lists in Spring 2018 in response to the system evaluation, transportation equity analysis, project evaluation and public input
Jan. – Feb. 2018	On-line public comment opportunity on draft projects and key findings
Feb. 2018	Regional Leadership Forum 4 a. Discuss regional findings and deficiencies, project information and public input on draft projects lists b. Discuss updated funding information c. Provide direction on refining investment priorities (e.g., timing and/or constrained/strategic list) and updated evaluation measures and project criteria
Feb. to April 2018	Cities and counties work with Metro, ODOT, Port, TriMet and SMART through technical and policy coordinating committees to identify investment strategy refinements, if needed or desired
April 29, 2018	Agencies submit updated projects and required information by 5 p.m.
May – June 2018	RTP Technical Evaluation Process (Round 2) Metro compiles refined draft project lists and reviews updated project submittals with TPAC and MTAC Metro evaluates refined draft project lists and updates regional-level findings on system performance and transportation equity analysis

	Metro reviews updated findings with TPAC and MTAC to frame tradeoffs and choices to highlight to the Metro Council, JPACT and MPAC
June 2018	Metro Council and JPACT recommend which draft project list (Round 1 or Round 2 or Hybrid) to be released during 45-day public comment period
June 29 to Aug. 13, 2018	Release public review draft RTP, Regional Framework Plan and Functional Plan amendments (if needed), and public review draft modal/topic plans for 45-day comment period & hearing
Sept. 2018	MTAC and TPAC consider public comment and make recommendations to MPAC and JPACT on 2018 RTP and modal/topical plans
Oct. 2018	MPAC and JPACT consider public comment and make recommendations to Council on 2018 RTP and modal/topical plans
Dec. 2018	Council action on 2018 RTP and Regional Transit Strategy, updated Regional Freight Plan, and updated Regional Safety Plan
Early 2019	Submit 2018 RTP to US DOT and LCDC for federal and state review

Agency contacts and Metro staff liaisons

Agency	Agency contact	Metro liaison
City of Portland	Courtney Duke (503) 823-7265 courtney.duke@portlandoregon.gov	Lake McTighe (503) 797-1747 lake.mctighe@oregonmetro.gov
Clackamas County and cities	Karen Buehrig (503) 742-4683 karenb@co.clackamas.or.us	Dan Kaempff (503) 813-7559 dan.kaempff@oregonmetro.gov
Multnomah County and cities (excluding City of Portland)	Joanna Valencia (503) 988-3043 x29637 joanna.valencia@multco.us	Jamie Snook (503) 797-1751 jamie.snook@oregonmetro.gov
Washington County and cities	Chris Deffebach (503) 846-3406 christina.deffebach@co.washington.or.us	Kim Ellis (503) 797-1617 kim.ellis@oregonmetro.gov
TriMet	Eric Hesse (503) 962-4977 hessee@trimet.org	Jamie Snook (503) 797-1751 jamie.snook@oregonmetro.gov
ODOT	Lidwien Rahman (503) 731-8229 lidwien.rahman@odot.state.or.us	John Mermin (503) 797-1747 john.mermin@oregonmetro.gov

2018 Regional Transportation Plan Project Evaluation Pilot

INTRODUCTION

At the direction of the Metro Council, Metro staff have been working with the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), and other interested partners to develop and pilot a project evaluation process and criteria to apply to projects submitted for consideration in the 2018 RTP. This project-level evaluation and criteria are intended to:

- 1.) Provide jurisdictions with information about the impact large-scale projects have on meeting our regional goals and addressing needs on the regional transportation system;
- 2.) Improve transparency to the public about the return on investment they receive by building regional projects;
- 3.) Help identify a pipeline of multi-modal regional transportation projects to address regional needs and public priorities, and maximize progress toward the region's shared vision and goals for our transportation system.

The project-level criteria, developed based on the adopted RTP goals and objectives, will first be tested and refined on a small subset of capital projects recommended by jurisdictional staff for inclusion in the RTP during the first Call for Projects. For the pilot phase, Metro staff recommend that application of the draft criteria be limited to a small number of capital projects submitted by each sponsoring agency. The city of Portland, ODOT, TriMet, Port of Portland and each county will be asked to apply the criteria to at least five of their respective project submittals. All other agencies will be asked to apply the criteria to at least one of their respective project submittals. During the second Call for Projects phase in 2018, Metro staff are recommending that all capital projects greater than \$10 million be evaluated, unless exempted as outlined in the criteria.

BACKGROUND

How the project evaluation criteria will be used

The project-level criteria provide information as to how the project helps advance the goals and objectives of the RTP. At no point will the project evaluation criteria be used to determine whether a project moves forward or not, or where it fits in a development timeline. The criteria are intended to simply provide information in a consistent, mode-neutral way. This information can then be used by policy-makers to identify regional priorities for future funding. The project-level criteria will also allow local jurisdictions to make better informed decisions to finalize the projects and programs they will recommend for the 2018 RTP (e.g., timing, phasing, and constrained vs. strategic project lists) in 2018.

The criteria work in conjunction with the system performance evaluation and transportation equity analysis that will be conducted on the Constrained RTP Investment Strategy and the Strategic RTP Investment Strategy. They provide a project-level look at how major projects impact our overall transportation system performance.

April 24, 2017

Use of the score

In order to compare "apples to apples," when the projects are presented they will be grouped and reported with similar project types. This means bike projects will be presented with other bike projects, road projects will be presented with other road projects, and so on. Local agency staff can then use that information to identify refinements to the initial project lists (e.g., timing, phasing, and constrained vs. strategic project lists) in 2018 to address deficiencies identified through the system evaluation and/or the transportation equity analysis. The pilot project evaluation criteria will be reviewed and refined by the RTP Performance Work Group in Fall 2017.

Steps to determine projects to include in the transportation plan

Local jurisdictions and county coordinating committees will play the strongest role in determining what projects are put forward for inclusion in the plan. After agencies determine their priority projects (dependent on the funding projections), agency and public input, technical analysis (e.g., the system performance and transportation equity analysis), and discussion by the Metro Council and regional policy advisory committees will help shape the final list in 2018.

In January 2018, the initial list of projects proposed by agencies will be shared with the general public, along with findings from the system performance and transportation equity analysis, for comments and input. Based on the input and any updates to the available funding forecast, the initial list of projects in the RTP will be updated by agencies for the final draft Regional Transportation Plan in April 2018. At that time, all capital projects greater than \$10 million in cost will apply the refined criteria, unless otherwise exempt as outlined in the updated criteria based on further discussion and recommendation by TPAC and MTAC in Fall 2017. The final draft project list will undergo a second round of system performance and transportation equity analysis and a final round of agency and public input before adoption in 2018.

DRAFT 2018 RTP PROJECT CRITERIA PROPOSED FOR TESTING *(The criteria are listed alphabetically and are subject to further discussion and refinement by TPAC and MTAC)*

1. AIR QUALITY AND CLIMATE CHANGE | 10 POINTS
 2. CONGESTION RELIEF | 10 POINTS
 3. ENVIRONMENTAL PROTECTION | 10 POINTS
 4. EQUITY AND ACCESS TO OPPORTUNITY | 10 POINTS
 5. FREIGHT AND GOODS MOVEMENT | 10 POINTS
 6. JOBS AND ECONOMIC DEVELOPMENT | 10 POINTS
 7. PLACEMAKING AND 2040 CENTERS SUPPORT | 10 POINTS
 8. READINESS AND COST-EFFECTIVENESS | 10 POINTS
 9. TRANSPORTATION SAFETY | 10 POINTS
 10. TRAVEL OPTIONS | 10 POINTS
- BONUS: TRANSPORTATION RESILIENCY | 5 POINTS

April 24, 2017

Exemptions from pilot project evaluation

The following projects are specifically exempt from the pilot:

- 100% locally funded projects
- 2015-2018 and 2019-21 Regional Flexible Funds Allocation (RFFA) funded projects, including:
 - Three priority bottleneck projects (I-5/Rose Quarter, OR 217, and I-205 widening – Ph. 1: I-205/Abernethy Bridge and Ph. 2: I-205 mainline);
 - Two priority transit projects (the Southwest Corridor and Division Transit projects); and
 - TBD active transportation projects selected by JPACT and the Metro Council for project development
- Freight rail and marine terminal projects
- Stand alone Intelligent Transportation Systems and Active Traffic/Corridor Management projects
- Programmatic activities such as the TOD program, transportation demand management programs, the Regional Travel Options program, etc.
- Transit maintenance and operations projects that do not add capacity, such as transit vehicle purchases and replacements, rail track reconfiguration, operational upgrades, transit garage upgrades, etc.
- Road maintenance and operations projects that do not add capacity, such as rehabilitation of bridge mechanical system, bridge painting, bridge deck repair, guardrails, etc
- Corridor refinement plans, area studies and other planning-focused projects

Comparison of Metro Council Resolution 17-4800 and MTIP May 2016 Policy Direction

Proposed May 2017 Res. No. 17-4800				Action May 2016			
Existing Transit Bond (MTIP Funds Committed under Res. Nos. 08-3942, 10- 4185)		Phase I Regional Flexible Funds Committed under Res No. 17-4800)	Total of Bonding Commitments	Existing Transit Bond (MTIP Funds Committed under Res. Nos. 08-3942, 10- 4185)		New Project Development Bond Commitment	Total Bonding Commitments
Year					Phase I Regional Flexible Funds		
2016	\$16,000,000		\$16,000,000	\$16,000,000			\$16,000,000
2017	\$16,000,000		\$16,000,000	\$16,000,000			\$16,000,000
2018	\$16,000,000		\$16,000,000	\$16,000,000			\$16,000,000
2018	\$16,000,000		\$16,000,000	\$16,000,000			\$16,000,000
2019	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$5,140,000	\$1,260,000	\$22,400,000
2020	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$5,140,000	\$1,260,000	\$22,400,000
2021	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$5,140,000	\$1,260,000	\$22,400,000
2022	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2023	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2024	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2025	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2026	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2027	\$16,000,000	\$3,250,000	\$19,250,000	\$16,000,000	\$6,100,000	\$1,260,000	\$23,360,000
2028		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2029		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2030		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2031		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2032		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2033		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
2034		\$12,100,000	\$12,100,000		\$17,690,000	\$1,260,000	\$18,950,000
Bond Funded Projects and Net Project Funding				Bond Funded Projects and Net Project Funding			
Southwest Corridor Transit Project			\$15,000,000	Southwest Corridor Transit Project			\$80,000,000
Division Transit Project			\$25,000,000	Division Transit Project			\$25,000,000
Project Development (Highway/Arterial)			\$10,000,000	Project Development (Highway/Arterial)			\$10,000,000
Active Transportation/Safe Routes to School			\$1,000,000	Active Transportation/Safe Routes to School			\$2,000,000

Position	Representative	Affiliation	Reappointment year
Active Transpo Stakeholder	Steph Routh		2019
City of Portland	Dan Saltzman*	Commissioner, Portland	2017
Clack Co	Paul Savas	Commissioner, Clackamas County	2019
Clack Co Stakeholder	Bill Avison**	Avison Lumber	2019
Clack Co Stakeholder	Jeff Gudman*	Councilor, Lake Oswego	2017
Clack Co Stakeholder	Brian Hodson*	Mayor, Canby	2019
Clack Co Stakeholder	Lori DeRemer*	Mayor, Happy Valley	2019
Clack Co Stakeholder	Bill Merchant	Vice Chairman, Hamlet of Beavercreek	2017
Freight Stakeholder	Pia Welch	Fed-Ex	2019
Hood River Co	Ron Rivers	Chair, Hood River County	2019
Hood River Co Stakeholder	Steve Bickford**	Mt. Hood Winery	2017
Hood River Co Stakeholder	Jess Groves	Commissioner, Port of Cascade Locks	2017
Hood River Co Stakeholder	Peter Cornelison**	Councilor, Hood River	2019
Metro	Craig Dirksen	Councilor, Metro	2017
Mult Co	Jessica Vega Pederson	Commissioner, Multnomah County	2017
Mult Co Stakeholder	Jerry Hinton*	Councilor, Gresham	2017
Mult Co Stakeholder	Joseph Santos-Lyons****	APANO	2019
Mult Co Stakeholder	Sam Breyer	Centennial School District	2017
Mult Co Stakeholder	Brian Newman***	OHSU	2019
Mult Co Stakeholder			2019
Mult Co Stakeholder	Chris Oxley**	Portland Trail Blazers	2017
ODOT Region 1	Rian Windsheimer	Region 1 Manager, ODOT	2019
Port of Portland	Bill Wyatt	Port of Portland	2017
Rural Transit Stakeholder	Julie Wehling	Canby Area Transit	2019
TriMet	Neil McFarlane	TriMet	2017
Wash Co	Roy Rogers	Commissioner, Washington County	2019
Wash Co Stakeholder	Denny Doyle*	Mayor, Beaverton	2017
Wash Co Stakeholder	Jeffrey Dalin*	Mayor, Cornelius	2019
Wash Co Stakeholder	Krisanna Clark*	Mayor, Sherwood	2019
Wash Co Stakeholder	John Cook*	Mayor, Tigard	2017
Wash Co Stakeholder	Pam Treece**	Westside Economic Alliance	2017

*City stakeholder

**Business/labor stakeholder

***Health stakeholder

****Environmental justice stakeholder

May 11, 2017

Re: USACE/Willamette Falls Locks Final Disposition Study Tentatively Selected Plan Public Comment Period

Dear Friends and Stakeholders of Willamette Falls Locks,

We write today to provide you an update regarding the ongoing discussions about the future of Willamette Falls Locks and to call your attention to an opportunity to provide feedback to the U.S. Army Corps of Engineers (USACE).

As many of you know, the Willamette Falls Locks has been kept in caretaker status since 2011, and is essentially closed for navigation purposes. The USACE pursued this status after an engineering report identified key operational safety concerns, and the USACE then made the unilateral decision in 2015 to pursue a disposition study to divest of its interests in the facility. That process is still ongoing today, known as the Final Disposition Study for Willamette Falls Locks. The USACE is nearing the final stages of selecting a Tentatively Selected Plan on an expedited schedule that will be subject to a 30-day public comment period beginning around May 15, 2017.

Meanwhile, the Willamette Falls Locks Working Group (Working Group) has been strategically meeting with the USACE to ensure the Final Disposition Study address key concerns and make possible the opportunity to transfer the facility to a new owner and operator. It remains the goal of the Working Group that the Willamette River continues serving as one river for navigational purposes. Beyond the opportunity for transfer, it is our goal to ensure the USACE's Disposition Study address several details, including: environmental assessments, Section 106 agreements, expectations to repair the facility, and addressing the concerns and needs of adjacent landowners.

As co-chairs of the Working Group, we strongly believe the local value of an operational Locks to be significant for historic and recreational tourism, strategic commercial use, tribal interests, and seismic transportation redundancy. While these values do not transcend to the USACE's scope of national economic benefit, they are important to the numerous river communities, businesses, and river lovers invested in the future of the Willamette River.

We hope you will continue your support for this work by submitting comments during the upcoming public comment period. As soon as the USACE releases their Tentatively Selected Plan and opens the public comment period, perhaps as soon as next week, our team will be in touch with you or your staff with details.

Thank you,



Martha Schrader
Commissioner, Clackamas County
Co-Chair, Willamette Falls Locks Working Group



Russ Axelrod
Mayor, West Linn
Co-Chair, Willamette Falls Locks Working Group