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**Wednesday, August 16, 2023**

**12:00 PM – 1:00 PM**

*\*One hour meeting due to time constraints*

**Meeting Link:**

<https://clackamascounty.zoom.us/j/86399643369?pwd=T0Y0VUkwa05ibnZpNGp5Rlp3Wkt2UT09>

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### **Agenda**

- **Tolling Updates (15m)**
  
- **Nexus Projects and RTAC (40m)**
  - Staff process so far
  - Development of the list
  - Policy Discussion
  - Recommendations to carry forward to C4
  
- **Joint Values Logo Reminder (5m)**

### **Attachments:**

- Memo on the Staff Development of the Nexus Project List (pg 2)
- Nexus Definition a Criteria Memo (pg 4)
- Nexus Intake Form (pg 9)

## MEMORANDUM

**TO:** C4 Toll Strategy Subcommittee  
**FROM:** Karen Buehrig, Long Range Planning Manager  
Trent Wilson, C4 and ClackCo Government Affairs  
**DATE:** August 10, 2023  
**SUBJECT:** NEXUS Clackamas Project List Process and Discussion

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### Overview:

Since the Governor issued “pause all toll collections” and the establishment the legislative Special Subcommittee on Transportation Planning, ODOT has been working quickly to deliver on two requests: submitting a finance plan by July 1, 2023 and an implementation plan by December 15, 2023.

ODOT submitted the Finance Plan on time, ahead of the July 1, deadline.

On a parallel path, ODOT has convened the Regional Toll Advisory Committee (RTAC). RTAC held a listening session in May and introduced the concept of Nexus Projects at the June meeting.

ODOT’s intention is to have local jurisdictions provide a list of projects that they feel have a nexus to tolling. And that this list will inform ODOT’s Implementation Plan due in December.

ODOT received meaningful pushback from regional partners, who were asking questions that RTAC was expected to answer or address at the July RTAC meeting. The July meeting was cancelled, but expected to cover the following topics:

- discussion of the feedback provided on the nexus projects process,
- discussion and adoption of an agreed upon definition of nexus projects and
- discussion of and adoption of agreed upon nexus project criteria.

Since the meeting was cancelled, regional staff has been collaborating to work with ODOT staff to understand the point of this nexus project process and provide feedback on the definition and criteria.

Simultaneously, ODOT has been working as though the concerns about the Nexus Projects process have been resolved. ODOT has provided a working definition and criteria to guide what projects will be considered, and has now released 38-question intake form that needs to be filled out for each submitted project.

Nexus Projects are due to ODOT in early September. Staff is working within a very narrow submittal window to coordinate with city staff to prepare the draft list, but also are struggling with many of the unknowns about the process, the lack of policy direction (or at least validation) from RTAC, and the lengthy criteria being requested by ODOT on each project which requires details that some jurisdictions will not yet have.

From regional partners, staff has heard a willingness to participate in the list formation process, but are unclear about why they have proposed that the Nexus list projects be prioritized by RTAC prior to submittal of the governor requested implementation plan. Staff has proposed that the Nexus List prioritization process be decoupled from the Implementation Plan and be delayed until ODOT provides modeling information and revenue projections for RMPP and the I-205 Toll Project available for consideration.

Other Topics for possible discussion:

RTAC members have discussed a desire for revenue sharing in lieu of project list development. ODOT has not provided an opportunity for this discussion to continue.

RTAC members have discussed a request for other pricing scenarios (managed lane, etc.). ODOT has not provided an opportunity for this discussion to continue.

#### **Staff Recommendation**

- Jurisdiction Staff coordinate to build a relevant list for each city and the county
- C4 in September: review and confirm the list that will be submitted
- C4 in September: consider the option to submit comments to accompany the list

#### **Future Milestones**

- August 16: C4 Toll Strategy Affirms Local Process, recommends comments
- September 7: C4 affirms submission list, finalized comment letter (if desired)
- September 8: County Nexus Projects Due to ODOT. (Extension from original Sept. 5<sup>th</sup> deadline)
- December 15: ODOT Submits Implementation Plan to Governor

#### **Policy Questions:**

- Do you support the continued work with our regional partners to focus on a long-term process for revenue distribution to local partners to address the impacts of tolling?
- Does C4 want to provide accompany comments when the Nexus projects are submitted?

# Memorandum

<b>Date</b>	July 27, 2023
<b>To</b>	Regional Toll Advisory Committee (RTAC)
<b>From</b>	RTAC Project Team
<b>Subject</b>	RTAC Nexus Projects: Updated Schedule and Process

This memorandum serves as an addendum to the RTAC Nexus Project List Development and Selection Criteria memorandum dated July 17, 2023. It provides greater detail on the purpose and schedule for development of the list of Nexus Projects.

## 1. Purpose of the Nexus Project List

The RTAC project team has received requests for additional information on the purpose of the RTAC nexus project list. We have also heard questions about how the Nexus Project List and the Public Transportation Strategy project and supportive services list relate. Below is a summary of the purpose of the Nexus initiative and how the Public Transportation Strategy effort will integrate into the Nexus timeline:

- The Nexus Project list, as well as the Public Transportation Strategy list of projects and supportive services, will be considered in the development of ODOT’s implementation plan due to Governor Kotek on December 15, 2023. These lists will be among the efforts in the region related to managing diversion and addressing equity concerns from tolling.
- If the RTAC decides that the Nexus and Public Transportation Strategy lists are important projects and agree that they complement the toll system, the ODOT will work with the committee to identify potential revenue streams, which could include toll revenue, federal, state funds, etc.).
- RTAC will need to consider equity, managing demand on the system, and other tradeoffs when evaluating the project lists in the context of available toll and other revenue sources.
- In 2025, the Level 2 Traffic and Revenue analysis for the Regional Mobility Pricing Project will provide greater detail on toll revenue, and ODOT will be able to estimate available funding for regional projects in the near and long term.

## 2. Project List Development Schedule

The process to develop a list of regional projects with a nexus to tolling has been updated based on partner agency feedback. Below is a revised schedule:

- **July 31:** Intake form released for Nexus projects. Any jurisdiction may submit a project, including jurisdictions not directly represented at the RTAC table.
- **August 7 – 18:** RTAC project team to hold meetings with partner agencies to collaborate and answer questions.
- **September 5:** Deadline for partner agencies/jurisdictions to submit initial Nexus projects using the intake form.
- **September 11:** RTAC project team distributes compiled project list to partner agencies in advance of the September 18 RTAC meeting.
- **September 18:** RTAC meets to discuss the initial project list and next steps.
- **September – November 2023:** ODOT Toll Project team will work with senior partner agency staff to review, discuss, and identify the Nexus projects that meet the criteria for further discussion by RTAC.
- **October 12:** Deadline for RTAC partner agencies/jurisdictions to submit additional potential projects.
- **November 13:** RTAC will discuss and refine the list of Nexus projects as well as next steps based on the outcomes of staff discussions September - November 2023.
- The refined Nexus project list and next steps will be considered in the development of ODOT's implementation plan, due to Governor Kotek on December 15, 2023.

# Memorandum

<b>Date</b>	July 17, 2023
<b>To</b>	Regional Toll Advisory Committee (RTAC)
<b>From</b>	RTAC Project Team
<b>Subject</b>	RTAC Nexus Project List Development and Selection Criteria

## 1. Introduction

This memorandum documents the proposed approach and revised selection criteria to develop the Regional Toll Advisory Committee (RTAC) list of pedestrian, bicycle, and other roadway projects that have a nexus to improving mobility in concert with a congestion pricing system on I-5 and I-205. This process will be coordinated with the ongoing effort lead by public transportation agencies to develop a Public Transportation Strategy (PTS) that best complements regional congestion pricing.

The information contained herein advances the conversation that began at the June 20, 2023, RTAC meeting, and addresses feedback from members and staff.

## 2. Nexus List Proposed Development Process

ODOT staff will work with senior staff from jurisdictions in the region to draft a list of nexus pedestrian, bicycle, roadway, and other mobility projects for RTAC consideration. The proposed approach to developing the draft nexus project list includes:

1. Develop definition and selection criteria for projects with a nexus to the proposed toll system on I-5 and I-205. RTAC reviews and provides input to the definition and criteria (June-July 2023).
2. ODOT will request jurisdictions/partner agencies to identify potential nexus projects using the definition, criteria, and a simple intake form. Any jurisdiction may submit a project, including jurisdictions not directly represented at the RTAC table (Request initiated in early August 2023).
3. Partner agencies/jurisdictions submit initial nexus projects using the intake form (By September 4, 2023).
4. The ODOT Toll Project team will work with senior partner agency staff to review, discuss, and identify the nexus projects that meet the criteria for discussion by RTAC (September 2023).
5. RTAC members may choose to submit additional potential projects by October 12, 2023.
6. RTAC will discuss and refine the list of nexus projects as well as next steps based on the outcomes of staff discussions (September and November 2023).
7. The refined nexus project list and next steps will be considered in the development of ODOT's Implementation Plan due to Governor Kotek on December 15, 2023.
8. In 2024, RTAC will revisit the nexus and PTS project lists to discuss funding options once revenue projections are known.

### 3. RTAC Input

The following elements of the draft nexus project definition and selection criteria changed as a result of input from several RTAC members:

Many respondents indicated that the definition of nexus either needed no further editing or was headed in the right direction. Minor text edits were made to the definition previously presented to enhance clarity. Several requested more information about the purpose of the nexus project list – this section has been added to this memo.

Many respondents indicated that the selection criteria are generally those that should be considered for nexus project list development. There was eagerness for more information about how selection criteria would be used, and the level of detail required from local jurisdictions. The project team reorganized the selection criteria into three categories, including: relationship to congestion pricing, equity, and project readiness. Additionally, individual selection criteria are more clearly defined based on member feedback. Some suggested criteria, such as project funding, were removed to simplify and focus the list. Project funding and cost will now be considered at a later stage.

See attachment for input received.

### 4. Purpose of the Nexus Project List

RTAC, and by association all regional ODOT Toll Project partners and jurisdictions, are asked to engage in an effort to identify pedestrian, bicycle, roadway, and other mobility projects<sup>1</sup> that have a nexus to congestion pricing when it is implemented on I-5 and I-205 in the Portland metropolitan area. The nexus projects are key projects that advance multimodal accessibility, are critical to achieving congestion relief in our region, and provide access to opportunity or address transportation-related disparities and barriers experienced by the Toll Projects' Equity Framework<sup>2</sup> communities.

The nexus project list (as well as the final Public Transportation Strategy project and supportive services list) is intended to aid ODOT and regional partners as the Toll Program advances, funding opportunities become available, and strategic partnerships and investments are aligned. Nexus projects are, in many cases, ambitious and essential infrastructure investments that are needed to provide mobility options in the region within the context of a priced system. Paired together, regional pricing and investments in the pedestrian, bicycle, roadway, and transit systems can support regional and state goals. The nexus project list may change and expand as funding and regional priorities and needs change.

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<sup>1</sup> Note, the Public Transportation Strategy is a separate effort underway to identify specific public transportation projects and supportive services that are complementary to a congestion pricing system on I-5 and I-205.

<sup>2</sup> Toll Projects Equity Framework.

[https://www.oregon.gov/odot/tolling/Documents/Toll\\_Projects\\_Equity\\_Framework\\_with\\_AppendixA.pdf](https://www.oregon.gov/odot/tolling/Documents/Toll_Projects_Equity_Framework_with_AppendixA.pdf)

## 5. Nexus Project Revised Definition

Text additions are underlined, and deletions are ~~struck through~~.

Nexus projects are pedestrian, bicycle, roadway, or other mobility projects that would complement a tolling system on I-5 and I-205 in the Portland metropolitan area by:

- Supporting congestion relief on a currently congested corridor that may become more congested with the implementation of tolling, OR improving access to public transportation, OR improving mobility options on a toll highway traffic diversion corridor<sup>3</sup> near the tolled highway, AND
- Providing access to opportunity OR addressing transportation-related disparities and barriers experienced by the Toll Projects' Equity Framework<sup>4</sup> communities.

## 6. Nexus Project Revised Selection Criteria

Category	Selection Criteria
<b>Congestion Pricing Nexus</b>	<ul style="list-style-type: none"> <li>• <b>Project Location</b> – Project is within a traffic diversion corridor<sup>3</sup>.</li> <li>• <b>Safety</b> – Project is focused on addressing a safety concern at an identified high injury location for vehicle drivers, pedestrians, or bicyclists.</li> <li>• <b>Network Connectivity</b> – Project provides additional connections to the street network.</li> <li>• <b>Congestion Relief</b> – Project supports congestion relief on a currently congested corridor that may become more congested with the implementation of tolls.</li> <li>• <b>Transit</b> – Connects to/expands access to public transportation or complements a Public Transportation Strategy project or supportive service.</li> </ul>
<b>Equity<sup>5</sup></b>	<ul style="list-style-type: none"> <li>• <b>Project Location</b> – Project serves Equity Framework communities.</li> <li>• <b>Benefits</b> – Project reduces travel times or adds modal options for Equity Framework communities.</li> <li>• <b>Access to job centers</b> – Project increases accessibility to job centers for Equity Framework communities.</li> <li>• <b>Climate</b> – Provides opportunities for reduced greenhouse gas emissions (or could contribute to improved air quality) or encourages multimodal transportation use.</li> </ul>
<b>Project Readiness</b>	<ul style="list-style-type: none"> <li>• <b>Planning stage, implementation phase, public engagement</b> – Project is included in regional transportation plan or a local plan, early planning conducted, public engagement conducted, and/or completeness of project design. Project is supported by facility owner and nearby communities.</li> </ul>

<sup>3</sup> Traffic diversion corridor as defined in 6.8.B Oregon Highway Plan Policy Amendment to Goal 6: Tolling and Congestion Pricing, [https://www.oregon.gov/odot/tolling/Documents/OHP\\_Goal\\_6\\_Policy.pdf](https://www.oregon.gov/odot/tolling/Documents/OHP_Goal_6_Policy.pdf)

<sup>4</sup> Toll Projects Equity Framework.

[https://www.oregon.gov/odot/tolling/Documents/Toll\\_Projects\\_Equity\\_Framework\\_with\\_AppendixA.pdf](https://www.oregon.gov/odot/tolling/Documents/Toll_Projects_Equity_Framework_with_AppendixA.pdf)

<sup>5</sup> EMAC review may result in adjustments to these screening criteria.



# RTAC Nexus Projects: Intake Form

The Urban Mobility Office (UMO) invites you to submit a list of pedestrian, bicycle, and other roadway projects that have a nexus to improving mobility options in concert with a congestion pricing system on I-5 and I-205. This process will be coordinated with the ongoing effort led by public transportation agencies to develop a Public Transportation Strategy (PTS) that best complements regional congestion pricing.

\* Indicates required question

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## General Information

1. **Name of project submitter:** \*

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2. **Preferred email for any questions:** \*

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3. **Project Name:** \*

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4. **Owner/Sponsoring Agency** (Agency that will be responsible to manage project delivery): \*

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5. **Location (city):** \*

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6. **Location (county): \***

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7. **Project Partner(s): \***

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8. **Category (Select all that apply): \***

*Check all that apply.*

- Bicycle
- Pedestrian
- Roadway

**Eligibility**

Nexus projects are pedestrian, bicycle, roadway other mobility projects that could complement a tolling system on I-5 and I-205 in the Portland metropolitan area by:

- Supporting congestion relief on a corridor that may become more congested with the implementation of tolling, OR improving access to public transportation, OR improving mobility options on a toll highway traffic diversion corridor, **AND**
- Providing access to opportunity OR addressing transportation-related disparities and barriers experienced by the Toll Projects' [Equity Framework](#) communities.

To be eligible for the nexus project list, the project must address BOTH of the above.

9. Please briefly (in 250 words or less) describe your proposed project and how your project meets the above definition: \*

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**Nexus Project Selection Criteria** - Congestion Pricing Nexus

Please select all that apply.

- 10. Project Location: Project is located within a corridor that may become more congested due to tolling diversion. \*

*Mark only one oval.*

Yes

No

- 11. If yes, please describe how the project meets Project Location:

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- 12. Safety: Project is focused on addressing a safety concern at an identified high injury location for vehicle drivers, pedestrians, or bicyclists. \*

*Mark only one oval.*

Yes

No

13. If yes, please describe how the project meets Safety:

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14. Network Connectivity: Project provides additional connection to the street network. \*

*Mark only one oval.*

Yes

No

15. If yes, please describe how the project meets Network Connectivity:

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16. Congestion Relief: Project supports congestion relief on a currently congested corridor that may become more congested with the implementation of tolls. \*

*Mark only one oval.*

Yes

No

17. If yes please describe how the project meets Congestion Relief:

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18. Transit: Connects to/expands access to public transportation or complements a Public Transportation Strategy project or supportive service. \*

*Mark only one oval.*

Yes

No

19. If yes, please describe how the project meets Transit:

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**Nexus Project Selection Criteria - Equity**

Please select all that apply.

20. Project Location: Project serves Equity Framework Communities. \*

*Mark only one oval.*

Yes

No

21. If yes, please describe how the project location serves Equity Framework Communities:

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22. Equitable Engagement: Equity Framework communities have had or will have the opportunity to engage in project development. \*

*Mark only one oval.*

Yes

No

23. If yes, please describe how the project meets Equitable Engagement:

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24. Benefits: Project reduces travel times or add modal options for Equity Framework Communities. \*

*Mark only one oval.*

Yes

No

25. If yes, please describe how the project meets Benefits:

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26. Access to Job Centers: Project increases accessibility to job centers for Equity Framework communities. \*

*Mark only one oval.*

Yes

No

27. If yes, please describe how the project meets Access to Job Centers:

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28. Climate: Provides opportunities for reduced greenhouse gas emissions (or could contribute to improved air quality) or encourages multimodal transportation use. \*

*Mark only one oval.*

Yes

No

29. If yes, please describe how the project meets Climate:

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**Nexus Project Selection Criteria** - Project Readiness Information

Please select all that apply.

30. Project is currently included in a regional transportation plan or a local plan. \*

*Mark only one oval.*

Yes

No

31. If yes, please explain how the project meets this criterion.

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32. Project will be ready for implementation within 5 years. \*

*Mark only one oval.*

Yes

No



33. If yes, please explain how the project meets this criterion.

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34. Project will be ready for implementation in 5 to 10 years. \*

*Mark only one oval.*

Yes

No

35. If yes, please explain how the project meets this criterion.

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36. Project has had some early planning conducted and/or completeness of project design. \*

*Mark only one oval.*

Yes

No

37. If yes, please explain how the project meets this criterion.

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38. Project is supported by facility owner and nearby communities. \*

*Mark only one oval.*

Yes

No

39. If yes, please explain how the project meets this criterion.

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