

# Metro | Agenda

Meeting: Transportation Policy Alternatives Committee (TPAC)  
Date: Friday, August 28, 2015  
Time: 9:30 a.m. to 12 p.m. (noon)  
Place: Metro Regional Center, Council Chamber

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- |                 |           |   |  |
|-----------------|-----------|---|--|
| <b>9:30 AM</b>  | <b>1.</b> | <b>CALL TO ORDER AND DECLARATION OF A QUORUM</b>  | <b>John Williams, Chair</b>                        |
| <b>9:35 AM</b>  | <b>2.</b> | <b>COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS</b>  | <b>John Williams, Chair</b>                        |
| <b>9:45 AM</b>  | <b>3.</b> | <b>CITIZEN COMMUNICATIONS ON AGENDA ITEMS</b>   |  |
| <b>10:00 AM</b> | <b>4.</b> | <b>* CONSIDERATION OF THE TPAC MINUTES FOR JULY 31, 2015</b>  |  |
| <b>10:05 AM</b> | <b>5.</b> | <b>* 2018 RTP and 2018-2021 MTIP Transportation Equity Analysis work plan - <u>Information/Discussion</u></b> <ul style="list-style-type: none"><li>• Purpose – To provide an overview and gather feedback on the draft approach for how equity will be considered in the 2018 RTP and 2018-2021 MTIP</li></ul> | <b>Ted Leybold, Kim Ellis<br/>Grace Cho, Metro</b> |
| <b>10:30 AM</b> | <b>6.</b> | <b>** MTIP and RFFA Public Comment Process Review <u>Information/Discussion</u></b> <ul style="list-style-type: none"><li>• Purpose: Review the MTIP and RFFA Public Comment process and provide input prior to presenting to JPACT</li></ul>   | <b>Dan Kaempff, Metro</b>                          |
| <b>11:10 AM</b> | <b>7.</b> | <b>SW Corridor Project Update <u>Information/Discussion</u></b> <ul style="list-style-type: none"><li>• Purpose: Review of recent and upcoming decisions on alignment, mode, and terminus</li></ul>   | <b>Malu Wilkinson,<br/>Chris Ford, Metro</b>       |
| <b>12:00 PM</b> | <b>8.</b> | <b><u>ADJOURN</u></b>   | <b>John Williams, Chair</b>                        |

Upcoming TPAC Meetings:

- Friday, September 25, 2015
- Friday, October 30, 2015
- Friday, November 20, 2015

- \* Material will be emailed with meeting notice
- \*\* Material will be emailed at a later date after notice
- # Material will be distributed at the meeting.

For agenda and schedule information, call 503-797-1750.  
To check on closure/cancellations during inclement weather please call 503-797-1700.



## 2015 TPAC Work Program

*As of 8/20/15*

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

<p><b><u>September 25, 2015</u></b></p> <ul style="list-style-type: none"> <li>• 2018 Regional Transportation Plan Update – Review draft work program – <u>Information/Discussion</u> (Kim Ellis, Peggy Morell, 40 min.)</li> <li>• ODOT Rough Roads Ahead and State of the System Report <u>Information/Discussion</u> (Kelly Brooks, 45 min)</li> <li>• Equity Strategy Act Plan draft review – <u>Information/Discussion</u> (Patty Unfred, Juan Carlos Ocana-Chú, 40 mins)</li> </ul>	<p><b><u>October 30, 2015</u></b></p> <ul style="list-style-type: none"> <li>• Chair comments: MTIP Amendments Quarterly Report – (Chair comments; 5 min) <u>Information</u></li> <li>• Endorse 2018 Regional Transportation Plan Update Work Plan – Action (Kim Ellis; 35 min)</li> <li>• MTIP and RFFA Policy Update Public Comments &amp; Framing Discussion for Draft Policy Document – <u>Information/Discussion</u> (Higgins, Kaempff; 40 minutes)</li> </ul>
<p><b><u>November 20, 2015</u></b></p> <ul style="list-style-type: none"> <li>• MTIP &amp; RFFA policy update - Work Session <u>Information/Discussion</u> (Dan Kaempff, Grace Cho; 45 min)</li> <li>•</li> </ul>	<p><b><u>December 18, 2015</u></b></p> <ul style="list-style-type: none"> <li>• SW Corridor Draft Mode Recommendation <u>Information/Discussion</u> (Wilkinson, 40 mins)</li> <li>• MTIP &amp; RFFA – <u>Recommendation</u> (Grace Cho, Dan Kaempff)</li> </ul>
<p><b><u>January 2016</u></b></p>	<p><b><u>February 2016</u></b></p>

**Parking Lot:**

- MTIP Obligation & Performance Report (Jan 2016)
- MAP-21 Implementation
- Atlas of Regional Mobility Corridors
- Regional Infrastructure Supporting Our Economy (RISE) update (Siegel)
- ODOT Enhance/Fix-It Process
- TAP project delivery contingency fund pilot – report out of results (Leybold, Cho)

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## សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានក្បួនលក្ខណ៍រើសអើងសម្រាប់ទស្សនាការសាធារណៈ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។  
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1890 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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## Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1890 (8 teev sawv ntxov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lw m ua ntej ntawm lub rooj sib tham.





**TRANSPORTATION POLICY ALTERNATIVES COMMITTEE**  
**July 31, 2015**  
**Metro Regional Center, Council Chamber**

MEMBERS PRESENT

John Williams  
Karen Buehrig  
Chris Deffebach  
Judith Gray  
Nancy Kraushaar  
Katherine Kelly  
Eric Hesse  
Kelly Brooks  
Nick Fortey  
Jared Franz  
Steve White  
Cora Potter

AFFILIATION

Metro  
Clackamas County  
Washington County  
City of Portland  
City of Wilsonville, representing Cities of Clackamas County  
City of Gresham  
TriMet  
Oregon Department of Transportation  
Federal Highway Administration  
Community Representative  
Community Representative  
Community Representative

MEMBERS EXCUSED

Don Odermott  
Michael Williams  
Lynda David  
Dave Nordberg  
Susie Lahsene  
Adrian Esteban  
Carol Gossett  
Lanny Gower

AFFILIATION

City of Hillsboro, representing Cities of Washington Co.  
Washington State Department of Transportation  
Southwest Washington Regional Transportation Council  
Oregon Department of Environmental Quality  
Port of Portland  
Community Representative  
Community Representative  
Community Representative

ALTERNATES PRESENT

Joanna Valencia  
Phil Healy  
Ken Burgstahler

AFFILIATION

Multnomah County  
Port of Portland  
Washington State Department of Transportation

STAFF: , Dan Kaempff, Ted Leybold, Malu Wilkinson, Tom Kloster, Richard Walker, Juan Carlos Ocana-Chú, Chris Myers, Caleb Winter, Kim Ellis, Grace Cho, Jamie Snook, Jeff Frkonja, Marne Duke, Ken Lobeck, John Mermin

**1. CALL TO ORDER AND DECLARATION OF A QUORUM**

Chair John Williams declared a quorum and called the meeting to order at 9:36 a.m.

## **2. COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS**

Announcements from committee members included notification of APA funding for a health planning proposal being submitted and opening of the new MAX orange line. Chair Williams introduced Jeff Frkonja, the new Research Center Director.

## **3. CITIZEN COMMUNICATIONS ON AGENDA ITEMS.**

There were no citizen communications.

## **4. CONSIDERATION OF THE TPAC MINUTES FOR JULY 31, 2015**

**MOTION:** Ms. Chris Deffebach moved and Mr. Steve White seconded the motion to adopt the TPAC minutes from July 31, 2015. It was requested to remove Miranda Bateschell's name from the "Alternates Present" section, as she is not an alternate.

**ACTION:** With the above change, Mr. Hesse, Ms. Potter and Ms. Kraushaar in abstention and the remaining present committee members in favor, the motion passed.

## **5. REGIONAL TRAVEL OPTIONS (RTO) TRAVEL AND AWARENESS SURVEY**

Mr. Dan Keampff, Mr. Caleb Winter and Ms. Marne Duke appeared before the committee and provided an update on the Regional Transportations Options (RTO) strategic plan and current program activities.

Every other year, RTO conducts a survey to measure to what extent the region's residents are experience using non-auto options and their awareness of RTO partner's outreach programs and other related efforts. While many things have been accomplished, the past several years have seen a two-fold increase in the regional need for Travel Options programs at the local level. The current level of RTO program funding cannot meet the current demand for local projects. Additionally, current planning policy direction (Regional Transportation Plan, Climate Smart Strategies, Transportation System Management and Operations Plan) calls for increasing regional efforts to reduce travel demand.

Metro staff is working to solicit feedback on how to devise a plan to meet the increasing needs and asked committee members for their feedback. Staff agreed to email out a link to the current strategic plan and survey results to the committee and agreed to come back to the committee in a few months for a follow up.

## **6. METRO TRANSPORTATION MODEL 5-YEAR PLAN –**

Mr. Richard Walker provided a presentation on the Model Development 5 Year Plan (included as part of the meeting record). His presentation covered the following information:

- Model Development Advisory Committee mission, goals and membership
- Data
- Software
- Networks
- Current travel model
- Advanced travel model
- Freight model

Committee members thanked Mr. Walker for his presentation.

**7. BICYCLE AND PED PLAN UPDATE**

Ms. Stephanie Millar, ODOT provided the committee with an Oregon Bicycle and Pedestrian Plan Update. She directed the committee's attention to a PowerPoint (included as part of the meeting record), that included the following information:

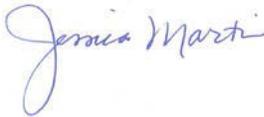
- Plan development process
- Bicycle and Pedestrian Existing Conditions
- Vision and Goals
- Policies and Strategies
- Investments and Implementation

A long-range Bicycle and Pedestrian Plan is being developed for Oregon, led by ODOT with significant involvement from stakeholders. The Plan is part of a set of statewide policy plans that establish a vision and policy framework for decision making, identify challenges, opportunities and trends affecting Oregon's transportation system. The Plan will direct decision making for how ODOT plans, invests, delivers and maintains its system.

Committee members inquired about and discussed plan consistency, impacts of the guidelines within the plan and public comment opportunities.

**8. ADJOURN** Chair Williams noted that the next meeting be held on August 28, 2015. The meeting was adjourned at 11:50 a.m.

Respectfully submitted,



Jessica Martin, Planning and Development

**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JULY 31, 2015**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DOC DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT No.</b>
1	Agenda	7/31/15	7/31/15 TPAC Agenda	073115T-01
2	Work Program	7/24/15	2015 TPAC Work Program	073115T-02
3	Meeting Summary	6/26/15	6/26/15 TPAC meeting summary	073115T-03
4	Memo	7/23/15	To: TPAC and Interested Parties From: Ted Leybold and Pamela Blackhorse Re: TIP adjustments for April – June 2015	073115T-04
5	Memo	7/22/15	To: TPAC and Interested Parties From: Kim Ellis Re: Request for Agency Review of 2018 RTP Base Year Network	073115T-05
6	Flyer	Summer 2015	2018 RTP flyer	073115T-06
7	PowerPoint	7/31/15	Regional Travel Options Strategic Plan Update Evaluation & Survey Results, Marketing & Outreach	073115T-07
8	Memo	7/22/15	To: TPAC and Interested Parties From: Dan Kaempff Re: RTO Strategic Plan Update	073115T-08
9	PowerPoint		Model Development Five Year Plan	073115T-09
10	Flyer		What's New For the Oregon Bicycle and Pedestrian Plan	073115T-10
11	PowerPoint	July 2015	Oregon Bicycle and Pedestrian Plan	073115T-11



## Metro | Memo

Date: August 20, 2015  
To: Transportation Policy Alternatives Committee and interested parties  
From: Grace Cho, Transportation Planner  
Subject: Transportation Equity Analysis for the 2018 RTP and 2018-2021 MTIP

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### **Purpose**

Seek feedback on the draft work plan for the Transportation Equity Analysis (TEA) to be conducted to support development of the 2018 Regional Transportation Plan and the 2019-21 Metropolitan Transportation Improvement Program.

### **Introduction**

As the Portland metropolitan region begins the next update to the Regional Transportation Plan, (due in 2018) and the Metropolitan Transportation Improvement Program (due in 2017), the transportation equity analysis (TEA) will serve as community-focused evaluation tool to look at the near and long-term effects of transportation investments on historically marginalized communities, which include communities of color, with lower income, with limited English proficiency, younger persons, and older adults.

The TEA builds on the work and recommendations from the 2014 Civil Rights Assessment for the 2014 RTP and the 2015-2018 MTIP, which looked at disproportionate benefits and burdens on five historically marginalized communities. The TEA, while similar to the 2014 Civil Rights Assessment in that it will evaluate transportation investments, differs in that it will measure the performance of the region's transportation policies and investment priorities relative to the priority equity outcomes identified by the five communities under consideration.

As part of the overview of the draft TEA work plan, the following materials are provided:

- Transportation Equity Assessment factsheet
- Transportation Equity Assessment work plan overview
- Draft work plan
- 2014 Civil Rights Assessment recommendations matrix

As a component of the 2018 RTP, this work plan will be adopted as part of the overall work plan for the 2018 RTP.

### **Definition and Purpose**

The Regional Transportation Plan uses an outcomes-based framework to guide planning and investment decisions. The TEA is a technical evaluation to better understand equity implications and address how regional transportation policies and investments can better advance equitable outcomes. The analysis looks at the investments performance relative to the transportation outcomes that are most important to communities of color, with lower income, with limited English proficiency, younger persons, and older adults. The purpose of the TEA is to provide better information of how near and long-term transportation investments can further advance equitable

outcomes and better support the three tenants of sustainability (economic, environment, and equity) that serve as a foundation for the Regional Transportation Plan. The results will provide insight on how transportation investments perform in advancing the equitable outcomes and provide data-driven evidence to inform policy and investment recommendations that aim to benefit all community members equitably.

While the transportation equity analysis is not a full performance assessment of the region's transportation network, it will serve as part of a larger performance evaluation, which also looks at near and long-term transportation investments ability to advance environmental and economic outcomes. The evaluation is a part of the 2018 Regional Transportation Plan (RTP) update, but also acts as the program assessment for the 2018-2021 Metropolitan Transportation Improvement Program (MTIP). To the degree possible and based on timelines, the components developed for the TEA will help shape evaluation criteria for the 2019-2021 Regional Flexible Fund Allocation (RFFA) as a means of implementing existing equity-related policies identified in the adopted 2014 RTP. Segments of the TEA fulfills federal mandates to ensure the region complies with national civil rights regulations and guidance on environmental justice, as part Metro's metropolitan planning organization (MPO) responsibilities.

### **Transportation Equity Analysis Role and Outcomes**

The TEA results and recommendations will help inform and support regional transportation policy discussions, which may lead to potential RTP policy refinements and guide updating the investment priorities for the 2018 RTP. Policy refinements and transportation investment priorities identified in the 2018 RTP in turn will help to provide coordination and investment direction for the 2021-24 MTIP and 2022-24 regional flexible fund allocation (RFFA).

Metro will be responsible for seeing through the recommendations from the TEA addressing regional transportation planning and related activities. Potential recommendations and activities can include, but not limited to:

- providing input and refinement to policy and planning for the MPO programs, including the 2018 RTP, 2018-2021 MTIP, and future cycles of the RTP, MTIP, and the Regional Flexible Funds Allocation (RFFA);
- providing the basis for evaluation criteria at a project and system-wide scale for informing the target setting refinement discussions for the 2018 RTP and directing potential performance measures;
- providing the content basis for the federally mandated Environmental Justice and Title VI analysis for MPO activities;
- identifying and providing direction on coordinating implementation actions that go beyond the scope of MPO activities.

### **Gathering Feedback and Key Questions**

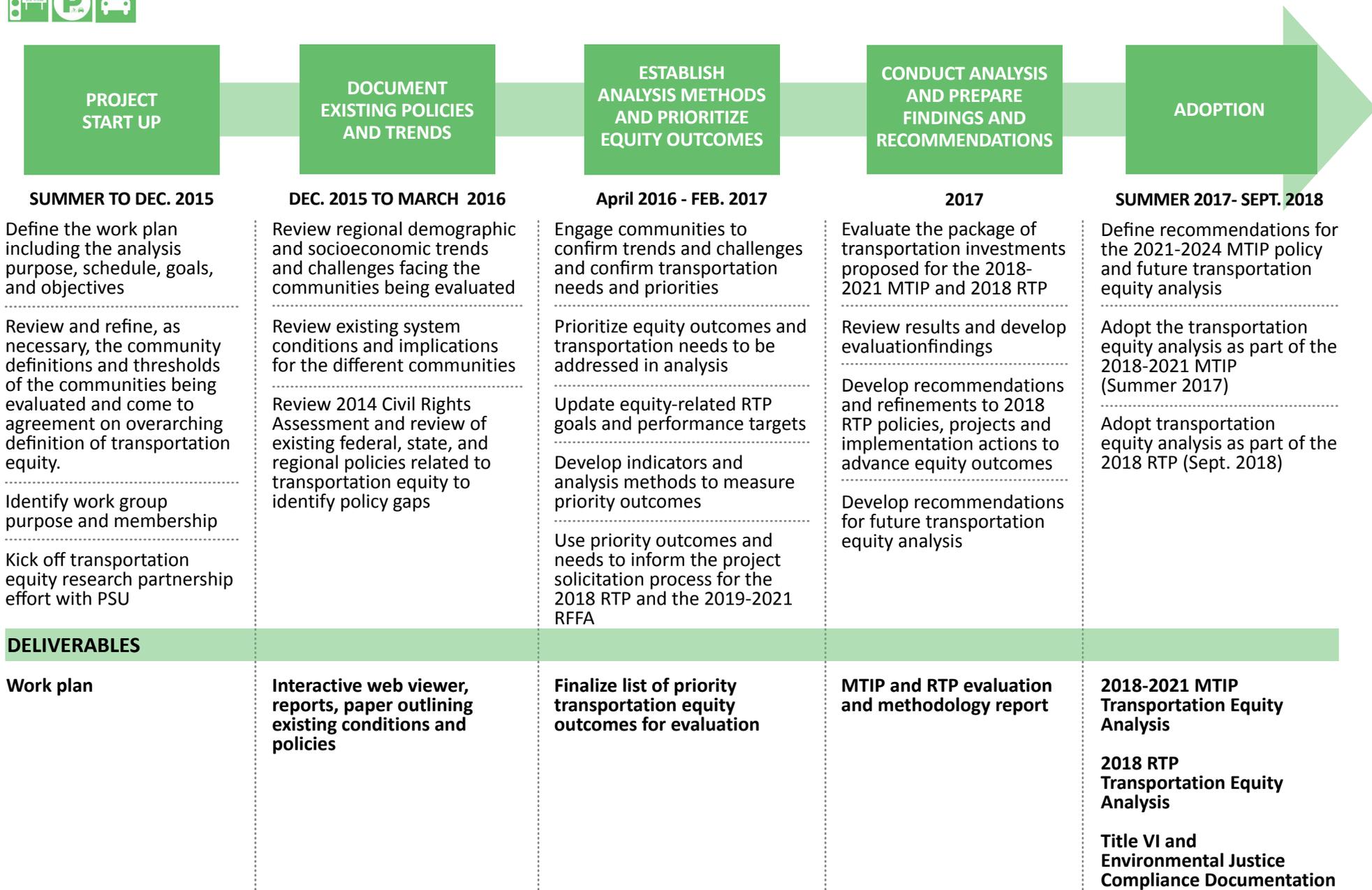
TPAC and MTAC are requested to discuss the following questions to provide feedback on the draft TEA work plan:

1. What would you like to see come out of the TEA?
2. Do you have comments or suggestions for the TEA work plan?
3. Would you like to participate in the TEA working group?
4. How would you like to stay engaged in the TEA work?



# 2018 RTP/2019-21 MTIP | TRANSPORTATION EQUITY ANALYSIS WORK PLAN

*Getting there equitably*





## Getting there equitably

### Transportation equity analysis 2015-18

*This analysis will evaluate social equity outcomes of proposed short- and long-term transportation investments for five regional populations:*

- *people of color*
- *people with low income*
- *people with limited English proficiency*
- *older people*
- *younger people.*

How we get around the Portland metropolitan region can have a large effect on our daily lives and broader implications for the environment we live in. Many of us have options and tools available as we go from place-to-place to help make the choice that best suits our needs.

But for people with fewer options it becomes harder to meet transportation needs without having to make difficult tradeoffs.

#### **Why social equity and transportation?**

As the Portland region prepares to make its next set of investments in the transportation system, an equity analysis can help us learn how our investments affect communities where people have the fewest options for travel to meet everyday needs. Understanding these effects helps us make more informed, equitable decisions about where transportation dollars go, especially as the region weighs many competing priorities in efforts to achieve the desired outcomes for the transportation system.

The purpose of a transportation equity analysis is to measure the social equity implications of near- and long-term transportation investments and policies. By evaluating transportation investments with an emphasis on the transportation priorities of communities of concern, the equity analysis provides a way to gauge how the region is doing in providing an equitable transportation system. It helps decision-makers formulate policies, actions, and investments the region can make towards achieving equitable outcomes.

As the region's metropolitan planning organization, Metro is required by federal legislation to evaluate its adopted short- and long-range regional transportation packages to ensure compliance with national civil rights regulations and guidance on environmental justice. Segments of the equity analysis fulfill elements of Metro's federal responsibilities.

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

**Metro Council President**  
Tom Hughes

**Metro Council**  
Shirley Craddick, District 1  
Carlotta Collette, District 2  
Craig Dirksen, District 3  
Kathryn Harrington, District 4  
Sam Chase, District 5  
Bob Stacey, District 6

**Auditor**  
Brian Evans

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 **Metro**  
[www.oregonmetro.gov](http://www.oregonmetro.gov)

July 31, 2015

## Components of the transportation equity analysis

From 2015 to 2018, the transportation equity analysis will:

- document demographic trends and transportation infrastructure conditions
- identify transportation priorities and the existing transportation policies support their implementation for communities of color, lower-income, limited-English proficiency, younger persons, and older adults
- conduct an evaluation of proposed short- and long-term transportation investments for the Portland region to see how these investments well they perform in advancing equitable outcomes
- identify potential policy and investment refinements, performance measures or recommended actions for future cycles of the RTP, MTIP and the regional flexible funds allocation.

## How does this work support other efforts?

The transportation equity analysis findings and recommendations will support the technical evaluation and policy discussions for the 2018 RTP and the 2018-2021 MTIP. The equity analysis will also be coordinated with Metro's Equity Strategy, as well as other regional planning efforts including the development of the Regional Transit Strategy and the Equitable Housing Initiative. Ongoing coordination and information sharing will ensure these initiatives will inform technical transportation equity analysis findings and support policy recommendations that will guide how the region moves forward to advance the consideration of social equity in future transportation planning and investment decisions. Additionally, a partnership with Portland State University and grant funding from the National Institute for Transportation and Communities (NITC) is supporting the development of transportation investment evaluation methods.

## Getting involved

A transportation equity analysis technical work group will be convened in 2016 and 2017 to advise Metro staff and review draft materials and analysis. Work group members will include topical experts and representatives from the Metro Technical Advisory Committee (MTAC) and the Transportation Policy Alternatives Committee (TPAC). Meetings will be open to the public. Meeting information will be posted on Metro's website at [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp).

Additional stakeholder engagement events are yet to be scheduled, but will take place throughout 2016 through 2018.

## Contact

For more information or to receive periodic email updates on the transportation equity analysis, contact:

Grace Cho, project manager | 503-797-1776 | [grace.cho@oregonmetro.gov](mailto:grace.cho@oregonmetro.gov).



**TRANSPORTATION EQUITY ANALYSIS**  
*Getting there equitably*

**DRAFT WORK PLAN**

Transportation is critical to connecting people to jobs, schools, housing, health care, grocery stores, and other places. For many, deciding how to get around can have a large effect on our daily lives and broader implication for the communities we live in. While many of us have a set of options and tools available as we go from place-to-place, such as a bike, bus pass, or car, to help make the choice that best suits our needs. For people with fewer options or tools it becomes harder to meet basic needs, participate, connect and contribute fully to community life without having to make difficult tradeoffs.

Therefore, as the Portland metropolitan region begins the next update to the Regional Transportation Plan (due in 2018) and the Metropolitan Transportation Improvement Program (due in 2017), a transportation equity analysis (TEA) will serve as a community-focused technical evaluation tool to look at the effects that near and long-term transportation investments have on historically marginalized communities (communities of color, with lower income, with limited English proficiency, younger persons, and older adults). By measuring the potential intended and unintended effects of proposed near and long-term transportation investments, the TEA will inform actions and next steps to help the region make progress towards achieving equitable, economic, and environmental outcomes through the transportation system.

**WHAT IS THE TRANSPORTATION EQUITY ANALYSIS (TEA)?**

The transportation equity analysis is a community-focused technical evaluation to understand better the equity implications of regional transportation investments and support equitable outcomes. The analysis looks at the performance of transportation investments relative to the transportation outcomes that are most important to communities (See sidebar). It incorporates a racial equity lens, as a means of integrating the tenants of Metro’s Equity Strategy, but also is more expansive to include communities which often struggle with mobility. The TEA is not a full performance assessment of the region’s transportation network, but serves as part of a larger performance evaluation, which also looks at near and long-term transportation investments ability to advance environmental and economic outcomes. The analysis builds on the lessons learned and recommendations from 2014 Civil Rights Assessment for the 2014 RTP and the 2015-2018 MTIP, which looked at disproportionate benefits and burdens on the same five communities being evaluated in the TEA.

<p><b>WHICH COMMUNITIES ARE BEING EMPHASIZED IN THE TEA?</b></p> <ul style="list-style-type: none"><li>• COMMUNITIES OF COLOR</li><li>• COMMUNITIES WITH LOWER INCOMES</li><li>• COMMUNITIES WITH LIMITED ENGLISH PROFICIENCY</li><li>• OLDER ADULTS</li><li>• YOUNGER PERSONS</li></ul>
--

While the transportation equity analysis main purpose is to provide an evaluation framework for the 2018 Regional Transportation Plan (RTP), it also serves as the program assessment for the 2018-2021 Metropolitan Transportation Improvement Program (MTIP) and help implement existing equity-related policy direction from the 2014 RTP. To the degree possible with project schedules, it will help shape the equity-related evaluation criteria for the 2019-2021 Regional Flexible Fund Allocation (RFFA). Segments of the TEA fulfills federal

mandates to ensure the region complies with national civil rights regulations and guidance on environmental justice, as part Metro’s metropolitan planning organization (MPO) responsibilities.

**TIMELINE FOR DEVELOPMENT OF THE TRANSPORTATION EQUITY ANALYSIS**

SUMMER - FALL. 2015	FALL - EARLY 2016	EARLY 2016 - FEB. 2017	2017	SUMMER 2017; SEPT. 2018
PROJECT START UP	DOCUMENT EXISTING POLICIES AND TRENDS	ESTABLISH ANALYSIS METHODS AND PRIORITIZE EQUITY OUTCOMES	CONDUCT ANALYSIS AND PREPARE FINDINGS AND RECOMMENDATIONS	ADOPTION
<p>Define the work plan including the analysis purpose, schedule, goals, and objectives</p> <p>Review and refine, as necessary, the definitions and thresholds of the five communities being evaluated and shared definition of transportation equity</p> <p>Identify work group purpose and membership</p>	<p>Summarize regional demographic and socioeconomic trends and challenges facing the five communities being evaluated</p> <p>Document the existing conditions and implications for the different communities</p> <p>Summarize the 2014 Civil Rights Assessment and review existing federal, state, and regional policies related to transportation equity to identify policy gaps</p> <p>Kick off transportation equity research partnership with PSU</p>	<p>Engage communities to confirm trends and transportation challenges, needs, and priorities</p> <p>Prioritize equity outcomes and transportation needs to be addressed in analysis</p> <p>Update equity-related RTP goals and performance targets</p> <p>Develop indicators and analysis methods to measure priority outcomes</p> <p>Use priority outcomes and needs to inform the project solicitation process for the 2018 RTP and the 2019-2021 RFFA</p>	<p>Evaluate the package of transportation investments proposed for the 2018-2021 MTIP and 2018 RTP</p> <p>Assess results and develop evaluation findings</p> <p>Develop recommendations and refinements to 2018 RTP policies, projects, and implementation actions to advance equity outcomes</p> <p>Develop recommendations for future transportation equity analysis</p>	<p>Define recommendations for the 2021-2024 MTIP policy and future transportation equity analysis</p> <p>Adopt the transportation equity analysis as part of the 2018-2021 MTIP (Summer 2017)</p> <p>Adopt the transportation equity analysis as part of the 2018 RTP (Sept. 2018)</p>

**Related planning and programming activities include:**

- Regional Transit Strategy (2015-2018)
- Metro Equity Strategy (2015-2016)
- Equitable Housing Initiative (2015-16)
- Regional Flexible Fund Allocation (2015-2016)

**Partners:** Local jurisdictions, transit agencies, ODOT, community-based organizations, Portland State University

**Engagement:** Metro technical and policy committee briefings, Metro Council briefings (as requested), 5-7 work group meetings to provide input on evaluation topics, methods, and recommendations and other engagement activities through 2018 RTP update and 2018-2021 MTIP development.

**Milestones:**



Council direction

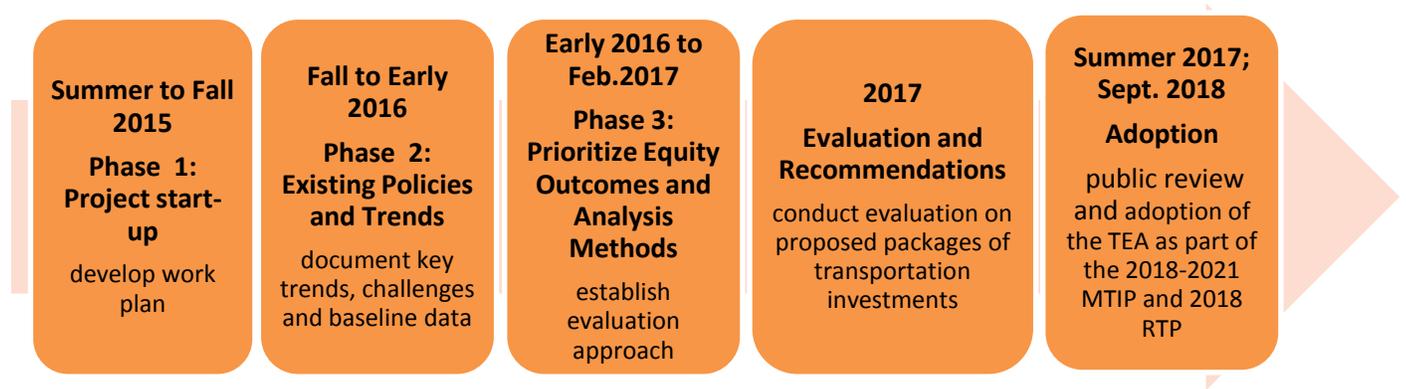


Council action



## HOW WILL THE TRANSPORTATION EQUITY ANALYSIS BE DEVELOPED?

Development of the TEA is composed of five phases of work, where each phase looks to build and inform the next phase and leading to draft findings and recommendations for decision-makers to consider. The five phases are:



A description of key activities is provided for each phase.

### PHASE 1: PROJECT START-UP

The first phase of the transportation equity analysis is to define and gather feedback on the work plan. The work plan outlines the purpose, objectives, and desired outcomes of the TEA and the general tasks and activities the analysis will undertake. The development of the work plan in Phase I will gather feedback through Metro’s engagement committees and establish areas of coordination with other concurrent work happening around equity, including Metro’s Equity Strategy, the Regional Transit Strategy, and research efforts with Portland State University (PSU) through a National Institute for Transportation and Communities (NITC) grant. Phase I sets the guiding framework for the TEA to assess and understand how to better advance equitable outcomes in the 2018 RTP and 2018-2021 MTIP.

Key activities include:

- Clarifying the transportation equity analysis purpose, goals, objectives, schedule, and scope;
- Begin background tasks to review and refine foundational elements, including thresholds and definitions of communities assessed in the TEA, and common definition of transportation equity;
- Begin to identify members to participate on a technical working group;
- Kick off partnership with PSU which will provide expertise on evaluating transportation equity.

### PHASE 2: DOCUMENT EXISTING POLICIES AND TRENDS

The second phase of the transportation equity analysis establishes a starting point for the analysis by identifying the regional context of policies, transportation conditions, and demographic trends. As the starting point, Phase II provides a snapshot of where the region is today and also helps set the benchmarks to measure progress.

Key activities include:

- Establishing the demographic and transportation baseline of the system, including an updated snapshot of the region’s demographic profile and description of the infrastructure conditions of the transportation system;
- Identifying the transportation priorities of the communities being evaluated to direct the development of evaluation measures for the following phases of the TEA;
- Summarizing the federal, state, and regional transportation policies addressing social equity or policies that support the identified priorities of communities to illustrate existing policies to build from and policy gaps to better advance transportation equity in the region;
- Implementing lessons learned and recommendations from the 2014 Civil Rights Assessment;
- Conducting a literature review of the best practices around evaluating equity in transportation planning and programming (conducted by PSU through the NITC research grant).

**PHASE 3: ESTABLISH ANALYSIS METHODS AND PRIORITIZE EQUITY OUTCOMES**

The third phase of the analysis focuses on prioritizing equity outcomes and assigning the appropriate method for evaluating outcomes. Through the launch of technical working group and feedback from various engagement efforts, Phase III will determine a short list of equity outcomes, which represent the transportation topics of most importance to the communities being evaluated. These topics will be the focus of the evaluation, where individual methods for evaluating each topic will be established. The development of the evaluation methods for the transportation topics will be coordinated with research work happening through PSU by support from a NITC research grant. Potentially, many of the transportation topics identified may already be addressed in other concurrent work happening as part of the 2018 RTP, such as the Regional Transit Strategy. The key emphasis in Phase III will be to add an equity lens over the evaluation methods. One potential outcome of Phase III evaluation may be updated performance targets and/or system performance measurements for continual monitoring of transportation outcomes.

<b>Potential Equity-Related Outcomes for Evaluation</b>	
<b>Affordability</b>	<b>Transportation Safety</b>
Helping to make the region’s transportation system affordable for all users, particularly the users with the most limited means.	Ensuring all users of the transportation network, regardless of mode, are free of physical harm when using the system.
<b>Multimodal Options</b>	<b>Accessibility and Connectivity</b>
Expanding the region’s transportation options for all communities, particularly those communities which presently have the most limited choices, due to connectivity, affordability, or access concerns.	Providing better transportation connections and access to jobs, education, services and other places across the region, particularly those places important to communities.
<b>Public Health</b>	<b>Air Quality</b>
Expanding the ways in which the transportation system can prevent and provide solutions to systemic disease and injury, particularly the most vulnerable communities and populations with greater risk.	Ensuring the effects the transportation system has on greenhouse gas, air toxics and criteria pollutant emissions are not burdening communities and populations with greater risk.

Key activities include:

- Identifying communities’ transportation challenges and needs through engagement and confirm initial list of transportation priorities;
- Undertaking a prioritization exercise to narrow the list of transportation priorities and equity outcomes to evaluate in the transportation equity analysis;

- Identifying and understanding the details of the different analytical tools and data available for the transportation equity analyses;
- Gathering research and methods from the PSU NITC partnership on different methods for evaluating transportation equity and identified priorities;
- With the technical working group, defining and select the methods to use for the transportation equity analysis which measure the emphasized transportation priorities.

#### **PHASE 4: CONDUCT EVALUATION AND PREPARE FINDINGS AND RECOMMENDATIONS**

The fourth phase of the transportation equity analysis is to conduct the evaluation, where the package of investments proposed for the 2018 RTP and 2018-2021 MTIP are assessed using the approach and methods established in the third phase. The results will be compared to the baseline and benchmarks established in the second phase and draw conclusions from the technical evaluation about progress and performance. From the TEA results, a set of draft findings will be developed and key recommendations will be created with the participation of the technical working group. The findings and recommendations from Phase IV potentially include the following types of policy direction:

- make recommendations towards improving data and assessment methods in need of further refinements and resources for future analyses;
- develop policy recommendations, such as proposed policy language refinements that better align the regional transportation system policies and investments to achieve the desired equity outcomes;
- develop a near-and long-term suite of actions which are coordinated with Metro’s Equity Strategy and other concurrent planning efforts, including the 2018 RTP, to support further transportation topics identified;
- include the transportation topics and evaluation methods into the RTP performance measures and monitoring program;
- coordinate recommendations from concurrent efforts (e.g. Metro’s Equity Strategy and Action Plan, Regional Transit Strategy) and partners to better advance equitable outcomes through investments in the regional transportation system.

#### **PHASE 5: ADOPTION**

The fifth phase of the TEA is to undergo the approval and adoption process by JPACT and the Metro Council. The adoption of the TEA is a part of the 2018-2021 MTIP adoption, slated for summer 2017, and the 2018 RTP adoption, slated for fall of 2018.

#### **HOW DOES THE TEA RELATE TO THE 2018 RTP AND 2018-2021 MTIP?**

The TEA functions as an equity-focused evaluation framework for the MPO operated transportation programs, which includes the RTP, MTIP, and RFFA. As the evaluation framework, it shares the same analytical foundation, including data sources and definitions, for federally required disproportionate benefits and burdens and disparate impact evaluation. However, for the purposes of federal compliance, additional analysis and formal determinations of disproportionate burden and disparate impact will be documented separately. What makes the TEA different from the analysis required for federal compliance is that it attempts to measure transportation investments ability to advance community identified equity outcomes rather than looking solely at the impacts

to historically marginalized communities. The TEA looks at additional historically marginalized communities beyond those required and will consider equity implications throughout the planning process rather than a post-facto assessment to ensure disproportionate harm is done through transportation investments. The TEA as an evaluation on its own is not intended to serve as the minimally required analyses required for federal compliance purposes, but rather as an overall evaluation approach to assessing equity implications in transportation planning and programming.

The relationship and outcomes of the TEA will differ slightly based on which MPO transportation program is being evaluated. For the 2018 RTP, the TEA serves as one part of a multifaceted evaluation of long-term transportation investment scenarios. For the 2018 RTP, the TEA will inform refinements or potential new regional transportation policies as well as shape an action strategy. Also for the 2018 RTP, the TEA will help create and refine equity-oriented transportation performance measure(s) for long-term monitoring of policy and investment progress in advancing equitable outcomes.

Because the 2018-2021 MTIP and the 2019-2021 RFFA both serve as mechanisms to implement the most recently adopted RTP, the 2018-2021 MTIP and 2019-2021 RFFA will look to implement the equity-related policies set forth in the 2014 RTP, while also serving as tools to learn and refine the TEA for the 2018 RTP evaluation. As a learning tool, the TEA for the 2018-2021 MTIP will propose refinements to the evaluation methods for measuring transportation investments and help define how near-term investments are making progress towards the transportation priorities communities. In looking to implement the existing equity-oriented policies from the 2014 RTP, the TEA will help inform and establish the criteria for investment prioritization in the 2019-2021 RFFA. The outcomes and results from the TEA for the 2018-2021 MTIP will also include recommendations, potential policy refinements, or action steps, but these actions would be applied for the following cycles of the MTIP and RFFA.

The TEA is also intended to serve as the mechanism to help operationalize the recommendations and policy direction from the forthcoming Metro Equity Strategy. While the recommended actions from Metro's Equity Strategy have yet to be determined, the TEA will look to adjust the evaluation accordingly to implement the strategy.

#### **HOW DOES THIS PLAN SUPPORT OTHER EFFORTS?**

The transportation equity analysis is a component of the 2018 RTP and the 2018-2021 MTIP, both of which are kicking off the update process in 2015. The decision points for the analysis are intended to align with the main actions to adopt the 2018-2021 MTIP and 2018 RTP. Interdepartmental coordination between the staff of Metro's Equity Strategy, as well as other planning efforts such as the Regional Transit Strategy and the Equitable Housing Initiative will ensure consistency as planning efforts progress.

Additionally, the TEA is being coordinated and informed by a partnership with Portland State University through a grant funded by the National Institute for Transportation and Communities (NITC). The PSU NITC work will look to develop evaluation methods for assessing equity in regional transportation plans and the research will inform and/or be applied in the TEA.

## APPENDIX: DETAILED WORK PLAN

The five phases of the TEA work will take place throughout spring 2015 through fall 2017. The majority of the key activities and evaluation method development is scheduled to occur throughout 2016 and into early 2017. The following tables provide an overview of the key activities, partnerships, and milestones.

Additionally, Metro partnered with researchers at Portland State University (PSU) who received a grant through the National Institute for Transportation and Communities (NITC) to study and research methods for evaluating equity in regional transportation planning and programming. Working in partnership with the PSU team, overlapping tasks, as appropriate, are being integrated or coordinated with the five phases of the TEA work program.

### Phase I (Summer – Fall 2015) – Work Plan Development, Purpose, and Goals

Key Activities	
Planning	<b>Identify and affirm the purpose, goals, and objectives</b> for the transportation equity analysis.
	<b>Articulate the scope of work</b> for the transportation equity analysis. <ul style="list-style-type: none"> <li>Clearly define the issues the TEA can address and other areas the TEA will not be able to address.</li> <li>Daylight initial known technical limitations of the analysis.</li> </ul> For topics the TEA is unable to address, identify how other parallel work, including Metro’s Equity Strategy and the Equitable Housing Initiative, may help cover issues beyond the scope of the analysis.
	<b>Define work plan</b> and working partnerships for successful outcomes.
	<b>Update data</b> needed to document the existing conditions of the region.
	<b>Refine definitions</b> of historically marginalized communities, particularly definition of communities with lower-income.
	<b>Define and identify</b> working group purpose, roles, goals, and membership.
Partnerships & Engagement	<b>Inform and gather feedback from Metro’s engagement committees and policy-makers</b> on the transportation equity analysis work plan. <i>(Fall 2015)</i>
	<b>Coordinate work plans for the project kick off of the National Institute for Transportation and Communities (NITC) grant</b> work on transportation equity evaluation methods. <ul style="list-style-type: none"> <li>Initial work may include identification of NITC grant project working group, to overlap or initially serve in-lieu of TEA technical work group</li> </ul>
Milestone	<b>Draft work plan</b> for the transportation equity analysis available for feedback and comment. <i>(Fall 2015)</i>

### Phase II (Fall 2015 – Early 2016) – Document Existing Policies, Conditions, and Trends

Key Activities	
Planning	<b>Summarize regional demographic and transportation trends</b> to establish a working understanding of what is happening and what has changed.
	<b>Identify transportation needs</b> of historically marginalized communities. <ul style="list-style-type: none"> <li>Review previous public comment and engagement reports to identify thematic priorities.</li> <li>Ground truth the information through open houses and engagement.</li> </ul>
	<b>Review and affirm existing conditions</b> to establish an agreed upon baseline and starting point for the priority topics of focus, and technical evaluation benchmarks.

	<b>Establish existing conditions</b> of transportation system to understand the gaps and deficiencies.
	<b>Identify existing federal, state and regional transportation policies</b> which address equity or are related to the identified transportation needs of historically marginalized communities.
<b>Partnerships &amp; Engagement</b>	<b>Engage partners</b> through existing conditions workshop to gather feedback on updated data, refined definitions, and existing conditions. <i>(Winter/Spring 2016)</i>
	<b>Make request for participants</b> for the TEA working group.
	<b>Review and coordinate recommendations from draft Metro Equity Strategy</b> with work plan components for the TEA.
	<b>Coordinate background research</b> with the NITC partnership on methods, approaches, and applied best practices across the nation on evaluating transportation equity.
	<b>Gather feedback and input on transportation priorities</b> of historically marginalized communities through parallel efforts happening including DEI roundtable discussions and MTIP and RFFA policy update workshops.
<b>Milestone</b>	<b>Interactive web viewer</b> outlining demographics trends, transportation infrastructure conditions. <i>(Spring 2016)</i>
	<b>Metro Council and JPACT</b> consider approval of the TEA work plan through the 2018 RTP work plan and engagement strategy approval process. <i>(End of 2015)</i>

Phase III (Early 2016 – Early 2017) – Establish Analysis Methods and Prioritize Equity Outcomes to Measure

<b>Key Activities</b>	
<b>Planning</b>	<p><b>Prioritize transportation topics</b> of greatest interest to communities and policy-makers as the focus of the transportation equity analysis.</p> <ul style="list-style-type: none"> <li>• Identify key policy questions the technical evaluation of the transportation equity analysis help inform.</li> <li>• Use the transportation needs and priorities of historically marginalized communities as the main driver of identifying focused topics for evaluation.</li> </ul>
	<p><b>Identify corresponding evaluation measures</b> based on prioritized transportation topics.</p> <ul style="list-style-type: none"> <li>• Use the identified transportation priorities of historically marginalized communities to inform and narrow outcomes for evaluation.</li> <li>• Utilize the Equity Strategy framework report’s identified priorities and indicators</li> <li>• Identify areas of overlap with other evaluation measures being assessed in the broader performance measures work</li> <li>• Identify any areas of existing overlap of evaluation measures from other recent transportation analysis work, including the Regional Active Transportation Plan, Climate Smart Strategy, or the concurrent effort with the Regional Transit Strategy.</li> </ul>
	<p><b>Review existing analytical tools</b> to identify how the tools may be used in the transportation equity analysis.</p> <ul style="list-style-type: none"> <li>• Determine whether the tools can address the priority evaluation measure</li> <li>• Identify limitations to the tools and shortcomings as it pertains to addressing the priorities of historically marginalized communities</li> <li>• Identify potential refinements which can support the use of existing tools</li> <li>• Identify which priority measures the existing tools would serve as an</li> </ul>

	<p>evaluation instrument.</p> <p><b>Develop evaluation methodology</b> for each priority evaluation measure.</p> <ul style="list-style-type: none"> <li>• Work in partnership with the NITC grant research team to align evaluation measures and coordination research and method development</li> </ul> <p>Establish method for evaluating disparate impact and disproportionate benefits and burdens for additional work pertaining to federal compliance documentation</p> <p><b>Identify and draft recommended set of methods</b> for evaluating the region’s transportation investments.</p> <ul style="list-style-type: none"> <li>• Methods to correlate with the transportation priorities of communities.</li> <li>• Method development to be conducted, coordinated and reviewed by the research team on the NITC grant research team and technical work group.</li> <li>• Methods to factor in consideration of aggregate or package of investment analysis (i.e. scenarios or mobility corridors) and individual project analysis.</li> </ul> <p><b>Develop initial correlated system performance measure(s)</b> which the evaluation can support and develop ongoing monitoring.</p> <ul style="list-style-type: none"> <li>• The performance measures become integrated in the performance monitoring a part of the RTP.</li> <li>• Performance measures may get included into other Metro performance monitoring, such as long-term monitoring for the Equity Strategy or biennial reporting to Oregon State Department of Land Conservation and Development (DLCD).</li> </ul> <p><b>Test run</b> draft methods on individual projects nominated for RFFA (if possible with scheduling) and package of investments identified in the 2018-2021 MTIP for discussion and refinement purposes.</p>
<b>Partnerships &amp; Engagement</b>	<p><b>Coordinate and combined efforts with NITC grant research team</b> to develop proposed evaluation methods and share information on focus areas of interest for evaluation.</p>
	<p><b>Convene transportation equity technical work group</b> tasked with providing input and technical direction on the evaluation measures and method(s) for the transportation equity analysis. <i>(Early 2016)</i></p>
	<p><b>Contract with community-based organizations</b> to consultant and provide expertise on priorities and evaluation methods. <i>(tentative activity) (Spring or Summer 2016)</i></p>
	<p><b>Coordinate</b> with different 2018 RTP working groups and other planning efforts on data, benchmarks, and evaluation methods. Planning efforts and workgroups include the Regional Transit Strategy, Equitable Housing Initiative, and Transportation Safety.</p>
	<p><b>Inform and discuss with local partners</b> the identified priorities recommended for evaluation in the transportation equity assessment.</p> <ul style="list-style-type: none"> <li>• Discuss how the priorities can and should inform the project nomination for the 2018 RTP solicitation.</li> <li>• Discuss how the priority can be better integrated and should inform current and future funding allocation processes the 2018-2021 MTIP and beyond. <i>(2017)</i></li> </ul>
	<p><b>Review and coordinate final Metro Equity Strategy</b> results and recommendations into the work plan of the TEA, where feasible.</p>
<b>Milestone</b>	<p><b>Finalized set of topics</b> for evaluation in the transportation equity analysis. <i>(Summer 2016)</i></p>
	<p><b>Technical memorandums</b> discussing the details, advantages, and limitation of</p>

various methods for evaluating transportation investments.

Phase IV (2017) – Conduct Analysis and Prepare Findings and Recommendations

<b>Key Activities</b>	
<b>Planning</b>	<b>Make refinements to the evaluation</b> based on the test run process and learning more about the issues in applying the methods. Refinements made will be based on feasibility, timing, and resources available.
	<b>Run a region-wide analysis</b> using the priority measures and associated methods determined for the evaluation. <ul style="list-style-type: none"> <li>• Use the final list of programmed projects submitted to the 2018-2021 MTIP, if not conducted during Phase III as part of method development testing and refinement.</li> <li>• Use the proposed investment scenarios for the 2018 RTP</li> </ul>
	<b>Review initial results</b> and identify any technical errors pertaining to the evaluation.
	<b>Draw conclusions and findings</b> as to how proposed near and long-term transportation investments are achieving equitable outcomes related to the priorities of historically marginalized communities. Conclusions and findings also to reiterate evaluation scope and limitations.
	<b>Develop recommendations or policy refinements</b> on how regional transportation investments in the near and long-term can better address the priorities of historically marginalized communities. <ul style="list-style-type: none"> <li>• Recommendations will likely be both policy-oriented, such as refining language in RTP and MTIP to align better with equity outcomes and priorities, or technical recommendations like further research into data disaggregation, data collection, or identify new methods, if necessary, for evaluating the region’s transportation investments based on what was learned.</li> <li>• Recommendations are to be taken up by policy-makers as part of the adoption process of the MTIP and RTP.</li> <li>• Recommendations also to include measures for long-term performance evaluation and monitoring.</li> <li>• Recommendations may also include direction and refinements for future TEA.</li> </ul>
<b>Partnerships &amp; Engagement</b>	<b>Share results and lessons learned</b> with technical working group and other 2018 RTP working groups, Metro’s engagement committees, Metro’s Equity Strategy staff, and NITC partners.
	<b>Coordinate and work with partners</b> on formulating and refining the recommendations to better align regional transportation policies and investments to achieve equitable outcomes. <ul style="list-style-type: none"> <li>• Use the identified transportation priorities of communities and policy areas of interest by decision-makers as the starting place for recommendations and refinements.</li> <li>• Identify potential focus areas or technical recommendations for the next TEA.</li> </ul>
<b>Milestone</b>	<b>Completed draft</b> of Transportation Equity Analysis for the 2018-2021 MTIP (Summer 2017) and 2018 RTP (End of 2017) evaluation and methodology report. Evaluation and methodology report to highlight: <ul style="list-style-type: none"> <li>• Associated ways of measuring and evaluating the prioritized topics most</li> </ul>

pressing to historically marginalized communities at different scales (e.g. region-wide, sub-regionally, project).

- Identified list of associated and preferred performance measures.

Phase V (Summer 2017; Fall 2018) – 2018-2021 MTIP and 2018 RTP Adoption

Key Activities	
<b>Planning</b>	<p><b>Create a shared action strategy</b> with local partners that includes near and long-term implementation actions that can be addressed through the RTP, MTIP and Regional Flexible Fund Allocation (RFFA).</p> <ul style="list-style-type: none"> <li>• Action strategy may also include direction on implementation activities outside the scope of the RTP, MTIP, and RFFA, but can be further coordinated.</li> <li>• Action strategy also to include implementation actions and recommendations from Metro’s Equity Strategy, as applicable.</li> </ul>
	<p><b>Develop and complete compliance documentation</b> for the 2018-2021 MTIP and the 2018 RTP pertaining to Title VI and environmental justice.</p>
	<p><b>Develop draft legislation</b> in preparation to adopt the 2018-2021 MTIP and the 2018 RTP.</p>
<b>Partnerships &amp; Engagement</b>	<p><b>Engage partners</b> through Metro engagement committees to inform and gather final refinements for the overall 2018-2021 MTIP and 2018 RTP adoption package. <i>(MTIP Summer 2017; RTP Fall 2018)</i></p>
	<p><b>Provide public comment opportunities</b> to allow for broad feedback.</p>
	<p><b>Finalize the adoption drafts</b> of the 2018-2021 MTIP and 2018 RTP.</p>
<b>Milestone</b>	<p><b>Adopt</b> the 2018-2021 MTIP with policy refinements and recommendations to emerge from the transportation equity analysis.</p>
	<p><b>Adopt</b> the 2018 RTP with policy refinements and recommendations to emerge from the transportation equity analysis.</p>
	<p><b>Complete formal determinations</b> for Title VI and Environmental Justice compliance documentation.</p>

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In July 2014, the Metro Council with recommendation from the Joint Policy Advisory Committee on Transportation (JPACT), adopted the Civil Rights Assessment for the 2014 Regional Transportation Plan (RTP) and 2015-2018 Metropolitan Transportation Improvement Program (MTIP). The Civil Rights Assessment resulted in a number of recommendations directed towards improvements in evaluating, communicating, and engaging when addressing transportation investments potential impacts to equitable outcomes. In efforts to learn and improve with each planning process, the recommendations from the Civil Rights Assessment were used as the starting point for the developing the Transportation Equity Analysis draft work plan. The following matrix provides an overview of how the individual recommendations are being incorporated in the work plan.

2014 RTP and 2015-2018 MTIP Civil Rights Assessment Recommendation		TEA work plan – 2018 RTP	TEA work plan – 2018-2021 MTIP	Anticipated Products and Outcomes
<b>A. Overall Recommendations</b>				
1.	Work with agency partners in the region to clarify roles and responsibilities in complying with civil rights regulations in delivering transportation infrastructure services	Metro staff will to work with local partners to develop an informational workshop about roles and responsibilities by all and a showcase of best practices which demonstrate compliance with civil rights regulations from the early stages of planning a project to design through construction. A similar workshop was hosted by Metro and other partners in November 2013.		An informational workshop with local partners with participation from federal partners outlining roles, responsibilities, and best practices.
2.	Work with agency partners in the region, Metro equity strategy staff, and other interested community parties to define, budget and schedule work program objectives for consideration in the annual UPWP process	A draft work program for the transportation equity analysis will be presented to Metro’s engagement committees and Metro Council in Fall 2015 to get feedback and verify policy questions the transportation equity assessment should look to address. The approval of the transportation equity analysis work plan will be rolled into the approvals of the work plan for the 2018 RTP and 2018-2021 MTIP policy document.  Any additional tasks identified through the scoping and feedback received on the work plan for the transportation equity analysis will be reflected as part of the 2016-2017 UPWP.		Finalized work program for the transportation equity analysis, which is a component of the adopted 2018 RTP work program and part of the policy document for the 2018-2021 MTIP.  Adopted annual UPWP which references the work program.
3.	Develop innovate and robust methods to identify the transportation needs of communities of concern as an early task for the 2018 RTP update process to inform the project solicitation and	As part of the transportation equity analysis work plan, a background task is to identify an initial list of transportation needs and/or transportation priorities for communities of concern. The initial list will undergo a ground-truth through coordinated engagement efforts for		A document which outlines and identifies the transportation priorities and needs of communities of concern for distribution and discussion with the kick off of the working group.

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	evaluation phases of the update	the 2018 RTP to gather input and verify the needs and priorities list from interested stakeholders, members from the five identified communities being evaluated, and local partners.	Various engagement activities which help ground-truth the transportation needs and priorities of the five identified communities being evaluated in the transportation equity analysis.
4.	Conduct a regional transportation infrastructure gaps analysis relative to the location of communities of concern. This analysis would build from efforts recently conducted at Metro and throughout the region	<p>As part of the transportation equity analysis work plan, a background task is to conduct a transportation infrastructure inventory. The inventory will cover physical and operational transportation infrastructure. The inventory will look at where there are gaps in the system overlaid to where the five communities being evaluated in the analysis are located.</p> <p>The inventory will undergo a ground-truth through coordinated engagement efforts for the 2018 RTP to gather input for gaps which the inventory was unable to identify and verify the gaps. Information is planned to be sought from interested stakeholders, members from the five identified communities being evaluated, and local partners.</p>	<p>A document, report, and/or chapter within the 2018 RTP which identifies the transportation infrastructure gaps and a web-based viewer to look at maps.</p> <p>Various engagement activities which help ground-truth the transportation needs and priorities of the five identified communities being evaluated in the transportation equity analysis.</p>
5.	As an early task of the 2018 RTP update, develop and updated system performance measure for the RTP aligned to communities of concern and the transportation issues most import to them within data and technical limitations	The work plan for the technical analysis of the transportation equity analysis will look to create performance metrics which are directly connected to the transportation priorities identified by the five communities being evaluated in the analysis. Additionally, the research work on the National Institute for Transportation and Communities (NITC) will also help support the development of evaluation metrics and will be taken through the working group.	A defined performance measure(s) directly linked to the interests and priorities of the five identified communities being evaluated in the transportation equity analysis will be adopted as part of the 2018 RTP.
6.	Identify more specific metrics pertaining to equity consideration in the nomination and evaluation of projects to the 2018 RTP and 2018-	As part of the work plan for the transportation equity analysis working group, some topics for input include gathering feedback and direction on nomination and evaluation criteria and metrics to consider equity more	Tentative products and outcomes may include: specific metrics to equity included in the project solicitation or project list refinement instructions, criteria, and guidance

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	2021 MTIP.	<p>explicitly and specifically in regional transportation planning and programming. Research work from the National Institute for Transportation and Communities (NITC) grant may also help support the development of evaluation metrics and will be taken through the working group.</p> <p>Depending on timing, the informational workshop may cover specific equity metrics as part of Metro's recommendations and guidance to local partners.</p>	<p>for the 2018 RTP; specific metrics to equity included in subsequent cycles of the MTIP and RFFA policy direction.</p> <p>As necessary, specific equity metrics addressed in the informational workshop as referenced in recommendations A.1.</p>
7.	Providing greater clarity on what is expected of applicants in project nomination materials related to how environmental justice and Title VI was considered in nominated project(s). This information would be provided as direction for project nomination processes for the RTP and the regional flexible fund allocation process.	See response to recommendations A.1 and A.6 for the overall recommendations.	See products and outcomes to recommendations A.1 and A.6 for the overall recommendations.
8.	During the 2018 RTP update process, assess and proactively consider levels of investment in concentrated communities of youth relative the remaining population	The transportation equity analysis will include the assessing five communities (people of color, people with lower-incomes, people with limited English proficiency, younger persons, and older adults) and emphasis during technical analysis and project solicitations can highlight nominations that consider the needs and priorities of the five communities, particularly for younger persons.	Results from the transportation equity analysis will include analysis of transportation investments which benefit younger persons. Policy refinements and recommendations may also address specific actions to address transportation priorities of younger persons.
<b>B. Technical Evaluation Specific Recommendations</b>			
1.	Further refine the methodology for conducting environmental justice and Title VI programmatic analysis to consider new or additional measures of impact or burden in addition to the level of transportation metric. These new or additional measures would be identified from public engagement.	The transportation equity analysis has incorporated key topics, direction, and lessons learned from the 2014 Civil Rights Assessment and Metro's Equity Strategy Framework report to inform the areas of refinement for conducting environmental justice and Title VI programmatic analysis. Additionally, with the award of the NITC grant, Metro staff will be working with researchers at PSU to identify methods for evaluating	The transportation equity analysis evaluation method technical documentation and the analysis report as part of the 2018 RTP and the 2018-2021 MTIP documentation.

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	<p>Some potential areas of focus include:</p> <ul style="list-style-type: none"> <li>• Investigating different quantitative and qualitative methodologies for evaluating programmatic disproportionate burden and disparate impact.</li> <li>• Investigate the ability to disaggregate data sets to consider potential impacts at a more refined scale.</li> <li>• Identify metrics that holistically address the transportation concerns of communities of concern and use these metrics in evaluating regional plans and programming. These may include improved mobility and access, safety, and others identified through public comment.</li> </ul>	<p>distributional effects of transportation policies and investments which are tied closely to the transportation priorities of the five identified communities for the analysis. These evaluation methods will likely include both quantitative and qualitative analysis techniques and will look to address disproportionate and disparate impact. The scope and development of the evaluation method will also likely look at the ability to disaggregate datasets.</p>	
2.	<p>Consider methods to assess all transportation funds included in the MTIP for the Title VI and environmental justice evaluation; the current assessment includes federal and state, but not local and other sources.</p>	<p>The 2018 RTP will take into account surface transportation funds from all sources, including federal, state, and local. Therefore, the work plan for the transportation equity analysis will look to the assessment of the 2018 RTP investments to analyze environmental justice and Title VI considerations for all transportation funds.</p>	<p>The 2018 RTP project list as well as the transportation equity analysis technical documentation and the analysis report as part of the 2018 RTP and the 2018-2021 MTIP documentation.</p>
	<p>Investigate different methods for evaluating disparate impact and disproportionate benefits and burdens. Look at opportunities to potentially streamline and combine methods.</p>	<p>See response to recommendations A.1 and A.6 for the overall recommendations as well as response B.1 for technical recommendations.</p>	<p>See products and outcomes to recommendations A.1 and A.6 for the overall recommendations as well as response B.1 for technical recommendations.</p>
<b>C. Communications and Engagement Specific Recommendations</b>			
1.	<p>Develop a performance measure or goal for public involvement</p>	<p>The Oregon Innovation Award research, engagement, and findings will help shape the communications, framing,</p>	<p>Oregon Innovation Award report with recommendations and findings to support the</p>

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	<p>participation tailored to Metro’s efforts in planning (e.g. RTP, MTIP) or project development (e.g. Southwest Corridor Plan), which could be offered as best practices for local jurisdiction transportation system planning and project development processes.</p>	<p>and engagement strategy for the 2018 RTP update and 2018-2021 MTIP.</p>	<p>efforts around communications and engagement and inform a recommendation around a public involvement performance target.</p>
<p>2.</p>	<p>Continue to refine and develop the communications strategy for regional transportation planning and programming which communicates clearly, simply, and effectively with communities of concern. Some potential communications areas include:</p> <ul style="list-style-type: none"> <li>• Simplified and accessible messaging to communities of concern which describes Metro’s federal obligations (under Executive order 12898 and Title VI of the Civil Rights Act) at a programmatic level and the obligations of local partners (under Executive order 12898 and Title VI of the Civil Rights Act) at the individual project level.</li> <li>• Simplified and accessible messaging to communities of concern distinguishing the difference in Metro’s effort to meet federal obligations (under Executive order 12898 and Title VI of the Civil Rights Act) and Metro’s efforts pertaining</li> </ul>	<p>The Oregon Innovation Award research, engagement, and findings will help shape the communications, framing, and engagement strategy for the 2018 RTP update and 2018-2021 MTIP.</p>	<p>Oregon Innovation Award report with recommendations and findings to support the efforts around communications and engagement.</p>

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	<p>to equity.</p> <ul style="list-style-type: none"> <li>Continue to utilize innovative opportunities to engage with communities of concern</li> </ul>		
<b>D. RTP and MTIP Coordination with Metro's Equity Strategy Specific Recommendations</b>			
1.	Refine metrics for identifying communities of concern in coordination with Metro's equity strategy to create consistency across the agency	Using feedback from Metro's equity strategy, Metro staff, in anticipation of the next RTP and MTIP cycle, have been working on a set of background tasks to support the technical analysis and policy discussions. Part of the background work has included updating, refining, and reevaluating definitions for the five communities being evaluated in the transportation equity analysis. Information and recommendations from Metro's equity strategy was used as part of the background research for updating and refinement. The background work will also be presented as part of ground-truth coordinated engagement efforts for feedback and input.	See outcomes and products for recommendation A.3 and A.4 for the overall recommendations.
2.	Participate and engage with Metro's equity strategy technical advisory committee to consider and align the community identified indicators with potential and/or commonly used transportation indicators; this may require additional or shift in resources	During the development of Metro's equity strategy framework report, staff had periodic check in meetings and attended presentations by the equity strategy CBO advisory committee. The information from the final framework report including the overarching definition for transportation equity and indicators are being incorporated as part of transportation equity analysis work plan.	Transportation equity analysis work plan reflecting direction from the equity strategy framework report.
3.	Use Metro's equity strategy relational mapping work to define how the update of the RTP and development of the MTIP can advance the implementation of the equity strategy.	Continual ongoing coordination with Metro's equity strategy staff and Metro planning staff throughout the 2018 RTP development, 2018-2021 MTIP development, and the transportation equity assessment will help define areas where strategy actions can be incorporated and implemented.	Transportation equity analysis report, policy refinements, recommendations, and action strategy which reflect different equity strategy recommendations where a nexus exists.
4.	Use Metro's equity strategy relational mapping as a framework to help define the environmental justice and Title VI work programs.	See responses to: <ul style="list-style-type: none"> <li>recommendation A.2 in the overall recommendations;</li> <li>recommendation B.1 in the technical</li> </ul>	See outcomes and products for recommendation D.2 for the RTP and MTIP coordination with Metro's Equity Strategy specific recommendations

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|  |  | <p>recommendations; and</p> <ul style="list-style-type: none"><li>• recommendation D.3 to RTP and MTIP coordination specific recommendations.</li></ul> |  |
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