



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

**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 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. But for people with fewer options or tools it becomes harder to get from place-to-place to meet basic needs 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 (RTP) due in 2018, and the Metropolitan Transportation Improvement Program (MTIP) due in 2017, a transportation equity analysis (TEA) will serve as a community-focused technical evaluation to look at the effects that near and long-term transportation investments have on historically underrepresented communities (communities of color, with lower income, with limited English proficiency) as well as 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 improve the transportation system while also helping the region make progress towards achieving equitable, economic, and environmental outcomes.

**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 decision-making which leads to 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 agency-wide 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 the ability of near and long-term transportation investments 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.

<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>
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While the main purpose of the transportation equity analysis is to evaluate the proposed investment packages identified in the 2018 RTP, it also serves as the program assessment for the 2018-2021 MTIP. With the 2018-2021 MTIP, the transportation equity analysis allows the region to assess how well the existing equity-related policy direction from the 2014 RTP are being implemented through the profile of near term transportation

investments. Additionally, to the degree possible with project schedules, the TEA will help shape the equity-related evaluation criteria and the transportation investment prioritization for the 2019-2021 Regional Flexible Fund Allocation (RFFA). Segments of the TEA will also fulfill 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.

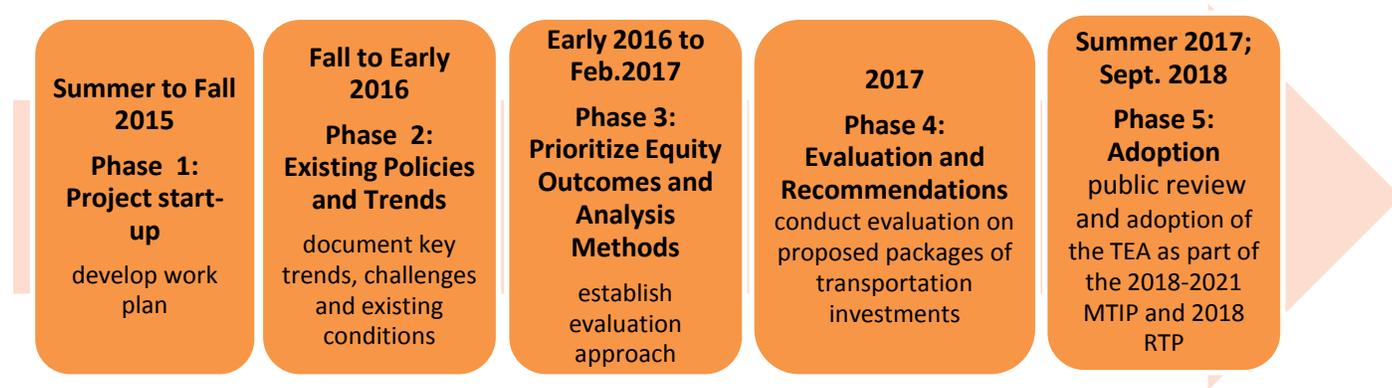
**TIMELINE FOR DEVELOPMENT OF THE TRANSPORTATION EQUITY ANALYSIS**

<b>SUMMER - END 2015</b>	<b>END 2015 - SPRING 2016</b>	<b>SPRING 2016 - FEB. 2017</b>	<b>2017</b>	<b>SUMMER 2017; SEPT. 2018</b>
<b>PROJECT START UP</b>	<b>DOCUMENT EXISTING POLICIES AND TRENDS</b>	<b>ESTABLISH ANALYSIS METHODS AND PRIORITIZE EQUITY OUTCOMES</b>	<b>CONDUCT ANALYSIS AND PREPARE FINDINGS AND RECOMMENDATIONS</b>	<b>ADOPTION</b>
<p>Define the work plan including the analysis purpose, schedule, goals, and objectives</p> <p>Identify work group purpose and membership</p> <p>Kick off transportation equity research partnership with PSU</p>	<p>Summarize regional demographic and socioeconomic trends and challenges facing historically underrepresented communities as well as older adults and younger persons</p> <p>Document the existing transportation conditions</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 analysis work group</p> <p>Review and refine, as necessary, the definitions and thresholds of the five communities being evaluated and shared</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>Create a performance baseline of prioritized equity outcomes for referencing in the analysis</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 Regional Flexible Fund Allocation</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>

	definition of transportation equity			
<b>Related planning and programming activities include (but not limited to):</b> <ul style="list-style-type: none"> <li>Regional Transit Strategy (2015-2018)</li> <li>Metro Equity Strategy (2015-2016)</li> <li>Equitable Housing Initiative (2015-16)</li> <li>Regional Flexible Fund Allocation (2015-2016)</li> </ul>				
<b>Partners:</b> Local jurisdictions, transit agencies, Oregon Department of Transportation (ODOT), community-based organizations, advocacy organizations, Portland State University				
<b>Engagement:</b> Metro technical and policy committee briefings, Metro Council briefings (as requested), 8-10 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.				
<b>Milestones:</b>				

**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 1 will gather feedback through Metro’s engagement committees and establish areas of coordination with other concurrent planning work happening around equity, including Metro’s agency-wide 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 1 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 2 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;
- Begin scoping and identifying the transportation priorities of historically underrepresented communities as well as older adults and younger persons to help inform engagement efforts and begin 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**

<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	Providing better transportation connections and access to jobs, education, services and other places across the region,

The third phase of the analysis focuses on prioritizing what equity outcomes communities have identified as most important and linking them to what is measured in the analysis. Early scoping of input about transportation challenges and needs in Phase 2 will help to establish a list of initial challenges and priorities. Engagement and outreach expected to occur in parallel in Phase 2 and Phase 3 with historically underrepresented communities and through the launch of technical working group

have the most limited choices, due to connectivity, affordability, or access concerns.

particularly those places important to communities.

#### Public Health

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.

#### Air Quality

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.

as well as feedback from various engagement efforts will result in a short list of equity outcomes for the TEA to focus. The short list of equity outcomes represents the transportation topics of most importance to the communities and individual methods for evaluating each topic will be established for the TEA. 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. A performance baseline of each evaluation measure is expected to be conducted in order to understand what the existing condition and have a point of comparison to understand if and how transportation investments are making progress. 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 3 will be to add an equity lens over the evaluation methods. One potential outcome of Phase 3 evaluation may be updated performance targets and/or system performance measurements as well as establishing a strategy for continual monitoring of equitable transportation outcomes.

Key activities include:

- Use early scoping to identifying communities' transportation challenges and needs through engagement and confirm initial list of transportation priorities;
- Undertaking prioritization exercises 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;
- Conduct a performance baseline using the evaluation approach and methods proposed to determine the existing condition as a point of comparison.

#### 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 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 4 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; these actions may include strategies which go beyond the transportation plan, but are topics the region continues to need to address;
- 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 MPAC, 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 underrepresented communities. The TEA looks at additional historically underrepresented communities beyond those required and will consider equity implications throughout the planning process rather than a post-facto assessment to check whether disproportionate impacts are seen and if mitigation is needed with the 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 identified by 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 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 1 (Summer – December 2015) – Work Plan Development, Purpose, and Goals

<b>Key Activities</b>	
<b>Planning</b>	<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 timeline, process, and initial topics the TEA will look to address and other areas the TEA will not be able to address.</li> <li>• Daylight initial known technical limitations of the analysis.</li> </ul>
	<b>Define work plan</b> and working partnerships for successful outcomes.
	<b>Identify updated 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.
<b>Partnerships &amp; Engagement</b>	<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>Recruit participants</b> for the TEA working group.
	<b>Define a work plan and 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>• Identify with the NITC team key areas to work together to help advance the practice of evaluating equity and the distributional effects of transportation investments in regional plans and programs.</li> </ul>
<b>Milestone</b>	<b>Finalize work plan</b> for the transportation equity analysis and see the work plan be adopted as part of the 2018 RTP approval. <i>(December 2015)</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 2 (December 2015 – Spring 2016) – Document Existing Policies, Conditions, and Trends

<b>Key Activities</b>	
<b>Planning</b>	<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 underrepresented communities as well as older adults and younger persons. <ul style="list-style-type: none"> <li>• Review previous public comment and engagement reports to identify</li> </ul>

	<p>thematic priorities.</p> <ul style="list-style-type: none"> <li>• Ground truth the information through online surveys, focus groups, and other partnered engagement opportunities.</li> </ul>
	<p><b>Confirm and share a common understanding</b> of what meant by transportation equity and which communities are the focus for the work.</p>
	<p><b>Establish and understand the existing conditions</b> of transportation system to understand the gaps and deficiencies.</p>
	<p><b>Identify existing federal, state and regional transportation policies</b> which address equity or are related to the identified transportation needs of historically underrepresented communities as well as older adults and younger persons.</p> <ul style="list-style-type: none"> <li>• Identify key policy questions and policy areas the technical evaluation of the transportation equity analysis help inform and advance equitable outcomes.</li> </ul>
<b>Partnerships &amp; Engagement</b>	<p><b>Convene transportation equity analysis 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>Conduct and coordinate engagement and outreach opportunities</b></p> <ul style="list-style-type: none"> <li>• Identify engagement opportunities with other concurrent planning processes to streamline opportunities.</li> <li>• Identify opportunities throughout the spring and in early 2017 to partner with local jurisdictions, community and service organizations, and regional partners on engagement events and gather feedback to inform the TEA.</li> <li>• Possibly develop a calendar year schedule of key engagement opportunities.</li> </ul>
	<p><b>Review and coordinate recommendations from draft Metro Equity Strategy</b> with work plan components for the TEA.</p>
	<p><b>Coordinate background research and literature review</b> with the NITC partnership on the federal, state, and regional policy landscape which applies to transportation equity.</p>
	<p><b>Gather feedback and input on transportation priorities</b> of historically underrepresented communities as well as older adults and younger persons through parallel efforts happening including DEI roundtable discussions and MTIP and RFFA policy update workshops.</p>
<b>Milestone</b>	<p><b>Interactive webviewer, regional snapshot factsheets, and other communications materials</b> outlining demographics trends, transportation infrastructure conditions for information purposes. <i>(Spring 2016)</i></p>
	<p><b>Updated existing conditions</b> for the 2018 RTP.</p>

Phase 3 (Spring 2016 – February 2017) – Establish Analysis Methods and Prioritize Equity Outcomes to Measure

Key Activities	
<b>Planning</b>	<p><b>Collect and prioritize transportation topics</b> of greatest interest to communities as the focus of the transportation equity analysis.</p> <ul style="list-style-type: none"> <li>• Use the transportation needs and priorities of historically underrepresented communities as well as older adults and younger persons 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 underrepresented</li> </ul>

communities as well as older adults and younger persons to inform and narrow outcomes for evaluation.

- Utilize other concurrent work such as the Equity Strategy framework report's identified priorities and indicators and Transportation for America's performance measures report.
- Identify areas of overlap with other evaluation measures being assessed in the broader performance measures work.
- 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.

**Review existing analytical tools** to identify how the tools may be used in the transportation equity analysis.

- Determine whether the tools can address the priority evaluation measures.
- Identify limitations to the tools and shortcomings as it pertains to addressing the priorities of historically underrepresented communities as well as older adults and younger persons.
- Identify potential refinements which can support the use of existing tools.
- Identify which priority measures the existing tools would serve as an evaluation instrument.

**Develop evaluation methodology** for each priority evaluation measure.

- Work in partnership with the NITC grant research team to coordinate research and develop methods for evaluation measures.
- Establish method for evaluating disparate impact and disproportionate benefits and burdens for additional work pertaining to federal compliance documentation

**Identify and draft recommended set of methods** for evaluating the region's transportation investments with the prioritized measures.

- The methods are to address the transportation priorities of historically underrepresented communities as well as older adults and younger persons.
- The development of the methods are coordinated and reviewed by the NITC grant research team and technical work group.
- Factors in consideration for the methods include aggregate or package approach for the investment analysis (i.e. scenarios or mobility corridors) and individual project analysis.

**Conduct a performance baseline** to establish an agreed upon starting point for the priority topics of focus and technical evaluation benchmarks.

**Develop initial correlated system performance measure(s)** which the evaluation can support and develop ongoing monitoring.

- The performance measures become integrated in the performance monitoring a part of the RTP.
- 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).

	<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.
<b>Partnerships &amp; Engagement</b>	<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.
	<b>Contract with community-based organizations, topical experts, and national equity experts</b> to consultant and provide expertise on priorities and evaluation methods. <i>(tentative activity) (Spring or Summer 2016)</i>
	<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.
	<b>Inform and discuss with local partners</b> the identified priorities recommended for evaluation in the transportation equity assessment. <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>
	<b>Review and coordinate final Metro Equity Strategy</b> results and recommendations into the work plan of the TEA, where feasible.
<b>Milestone</b>	<b>Finalized set of topics</b> for evaluation in the transportation equity analysis. <i>(Summer 2016)</i>
	<b>Performance baseline</b> of evaluation measures to have a point of comparison for the analysis of transportation investments.
	<b>Technical memorandums</b> discussing the details, advantages, and limitation of various methods for evaluating transportation investments.

## Phase 4 (2017) – Conduct Analysis and Prepare Findings and Recommendations

<b>Key Activities</b>	
<b>Planning</b>	<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, for method development testing and refinement.</li> </ul> Use the proposed investment scenarios for the 2018 RTP
	<b>Review initial results</b> and identify any technical errors pertaining to the evaluation.
	<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>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 underrepresented communities as well as older adults and younger persons. 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

	<p>underrepresented communities as well as older adults and younger persons.</p> <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>
<p><b>Partnerships &amp; Engagement</b></p>	<p><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.</p> <p><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.</p> <ul style="list-style-type: none"> <li>• Use the identified transportation priorities of communities and the findings from the analysis of investments as the starting place for recommendations and refinements.</li> <li>• Identify potential focus areas or technical recommendations for the next TEA.</li> </ul>
<p><b>Milestone</b></p>	<p><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:</p> <ul style="list-style-type: none"> <li>• Associated ways of measuring and evaluating the prioritized topics most pressing to historically underrepresented communities as well as older adults and younger persons at different scales (e.g. region-wide, sub-regionally, project).</li> <li>• Identified list of associated and preferred performance measures.</li> </ul>

Phase 5 (Summer 2017; September 2018) – 2018-2021 MTIP and 2018 RTP Adoption

<p style="text-align: center;"><b>Key Activities</b></p>	
<p><b>Planning</b></p>	<p><b>Refine proposed policies</b> for draft consideration for adoption by decision-makers.</p> <ul style="list-style-type: none"> <li>• Proposed policies would also be coordinated across different recommendations being drafted for the other work groups.</li> </ul> <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 concurrent planning efforts, such as the Equitable</li> </ul>

	Housing Initiative and Metro's Equity Strategy, as applicable.
	<b>Identify topics and actions</b> which go beyond the scope of the TEA and look to how other parallel work, including Metro's Equity Strategy and the Equitable Housing Initiative, can help address the topics and actions, or raise regional conversations to address.
	<b>Develop and complete compliance documentation</b> for the 2018-2021 MTIP and the 2018 RTP pertaining to Title VI and environmental justice.
	<b>Develop draft legislation</b> in preparation to adopt the 2018-2021 MTIP and the 2018 RTP.
<b>Partnerships &amp; Engagement</b>	<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>
	<b>Provide public comment opportunities</b> to allow for broad feedback. <ul style="list-style-type: none"> <li>• Notify TEA technical working group members and interested parties to the opportunities to provide feedback directly to decision-makers as they consider.</li> </ul>
	<b>Finalize the adoption drafts</b> of the 2018-2021 MTIP and 2018 RTP.
<b>Milestone</b>	<b>Adopt</b> the 2018-2021 MTIP with policy refinements and recommendations to emerge from the transportation equity analysis.
	<b>Adopt</b> the 2018 RTP with policy refinements and recommendations to emerge from the transportation equity analysis.
	<b>Complete formal determinations</b> for Title VI and Environmental Justice compliance documentation.