2018 Regional Travel Options Strategy

Adopted by Metro Council, May 24, 2018

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Project web site: oregonmetro.gov/regional-travel-options-strategic-plan

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EXECUTIVE SUMMARY

The Regional Travel Options (RTO) program guides the region in creating safe, vibrant, and livable communities by supporting programs that increase walking, biking, ride sharing, telecommuting, and public transit use. The RTO program is a critical strategy for getting the most benefit and use from transportation infrastructure investments. Through grants, sponsorships, policy guidance, regional coordination, and technical assistance, the Metro RTO program has been serving the region for over 20 years.

In 2019, the funding will be given more focus with the intent of increasing partnerships and achieving greater performance, and a new regional Safe Routes to School (SRTS) program will be established.

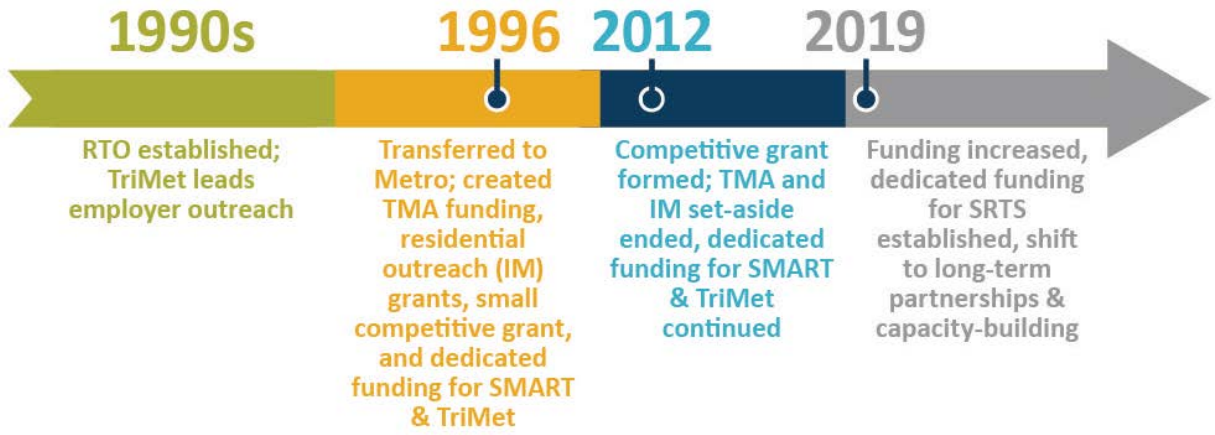
The Problem

The Portland metro region has grown and is continuing to grow, which results in increased auto trips and congestion. As demand on the transportation system increases, transit and carpool rates have declined,[1] while drive-alone rates have leveled off.[2] With more people moving to the region, decreased transit use and an unchanged drive-alone rate means that more cars are crowding roads. This hurts our economy, contributes to poor air quality and unhealthy lifestyles. It also disproportionately impacts people with lower incomes, older adults, youths and people with disabilities, and other historically-marginalized communities.

Goals and Objectives

The following goals and objectives guide Metro and its regional partners for the next ten years to make progress toward the established vision.

Timeline of RTO Structure and Focus



[1] "In Portland, Economic Displacement May be a Driver of Transit Ridership Loss" Transit Center. November, 14, 2017. http://transitcenter.org/2017/11/14/in-portland-economic-displacement-may-be-a-driver-of-transit-ridership-loss/.

[2] Metro RTO Program "Commute Options Report" (2017). www.oregonmetro.gov/travel-options-research

GOAL 1: INCREASE ACCESS TO AND USE OF TRAVEL OPTIONS TO REDUCE VEHICLE MILES TRAVELED, PROVIDE CLEANER AIR AND WATER, IMPROVE HEALTH AND SAFETY, AND ENSURE PEOPLE HAVE CHOICES FOR TRAVELLING AROUND THE REGION

Objective 1.1: Reduce the number of trips using personal, single-occupancy vehicles by educating and encouraging the public to drive less and utilize walking, biking, carpooling, vanpooling and public transit.

a. Invest in employer-based outreach projects in proportion to potential for promoting travel options, partners' capacity and readiness, and equity considerations.
b. Invest in community-based outreach projects in proportion to partners' capacity, past performance in promoting travel options, readiness for project delivery, and community need.
c. Provide funding for new travel options in the form of small infrastructure projects that promote and support multi-modal trips.

GOAL 2: REACH EXISTING AND NEW PARTICIPANTS MORE EFFECTIVELY BY EXPANDING THE RTO PROGRAM AND WORKING WITH NEW PARTNERS

Objective 2.1: Build partners' travel options capacity and expertise regionally.

a. Continue hosting the RTO Collaborative Marketing Group to share best practices and lessons learned between practitioners.
b. Develop marketing and outreach materials targeted to employers and employees for partners to use to promote non-single-occupancy vehicle modes.
c. In partnership with communities, develop marketing and outreach campaigns, including individualized marketing, and community-based travel option education, for new residents or other identified audiences.
d. Support partners attending and participating in the RTO Collaborative Marketing Group, including encouraging participation from new partners, providing onboarding support, offering scholarships for training opportunities and supporting partner marketing efforts.
e. Provide technical assistance and resources to assist partners in advancing along the capability index.

Objective 2.2: Allocate RTO resources in a way that prioritizes and impacts communities of color, older adults, youth, people with disabilities, and low-income households.

a. Strategically invest in partners, programs, and continuing education to reach communities of color and other new audiences including people with lower incomes, older adults, youths and people with disabilities, and other historically-marginalized communities.
b. Support small innovative projects to test new ideas for reaching communities of color, low-income households, and other historically-marginalized communities with travel options marketing and information.
c. Provide information about ways to get involved in the RTO program targeted towards organizations that focus on reaching target communities, regardless of whether they have a transportation focus.
d. Provide translation and interpretation services to partners for use in their program and advise on culturally-competent outreach.

Objective 2.3: Encourage innovation and new technology to increase access to travel options.

a. Increase access to and awareness of new technologies by hosting forums for private sector potential partners to showcase opportunities in the region and make connections between groups.
b. Make traveler information available to encourage private companies to better integrate travel options for users.
c. Pilot applications of new technologies for modes that reduce VMT.

Objective 2.4: Coordinate with State and local partners in planning for travel options work.

a. Link RTO efforts to goals outlined in the Metro Regional Transportation Plan.

b. Coordinate with ODOT on commute option programs and SRTS infrastructure funding and planning.
c. Support local planning work to better integrate travel options into Transportation System Plans, policies, and other local transportation decision-making.
d. Work with local jurisdictions, businesses, and partners to build local political and staff support and understanding for transportation demand management.

GOAL 3: ENCOURAGE FAMILIES TO WALK AND BICYCLE TO SCHOOL SAFELY BY IMPLEMENTING A REGIONAL SAFE ROUTES TO SCHOOL (SRTS) PROGRAM

Objective 3.1: Provide regional coordination and program development to support SRTS efforts throughout the region.

a. Provide technical assistance such as program development and strategy, interjurisdictional coordination, and other resources to assist county, city, school district, and other partners conducting local SRTS activities.
b. Host periodic SRTS meetings to share resources, information about policies and funding opportunities, and best practices with practitioners.
c. Use the Metro SRTS Framework equity analysis to prioritize funding, technical assistance, and other resource to identified underserved schools.
d. Provide regional mapping and GIS support for local SRTS efforts, such as mapping previously-identified school projects, identifying high-crash corridors and other barriers near schools, and designating recommended walking and biking routes to schools.
e. Provide planning support to integrate education work into engineering and planning activities to leverage outreach opportunities.
f. Establish a consistent data collection strategy for SRTS throughout the region, develop resources to easily collect needed data, and train practitioners on data collection and evaluation.

Objective 3.2: Support local jurisdictions, school districts, and other partners in delivering SRTS programming.

a. Work with County and City partners to plan for SRTS programs and coordinate across jurisdictional and school district boundaries.
b. Allocate funding to local partners based on capability and the established need for SRTS services, based on the Metro SRTS Framework equity analysis.
c. Support small innovative projects to test new ideas for shifting school commute modes.
d. Support small on-site school improvements, such as signage, striping, and bike parking.
e. Develop implementation resources such as guidebooks, templates, curriculum, outreach materials, and trainings for partners to use.
f. Offer translation support for locally-produced materials and interpretation for events.
g. Develop toolkits and purchase incentives to support local partners' hosting SRTS activities and education/encouragement events.

GOAL 4: MEASURE, EVALUATE, AND COMMUNICATE THE RTO PROGRAM'S IMPACTS TO CONTINUALLY IMPROVE THE PROGRAM

Objective 4.1: Evaluate RTO grants and funded programs to pursue a suite of RTO-funded activities that collectively achieve program-wide goals and align with state Transportation Option Plan performance measures.

a. Continue using a variety of approved data to evaluate how individual program components contribute to overall program goals.
b. Provide increased technical assistance, templates, and other support for data collection and reporting to partner projects.
c. Continue the development of the Multiple Account Evaluation (MAE) framework to allow ongoing adaptation and alignment with regional issues and opportunities.
d. Pursue new technologies to collect better data on how funded projects perform.

Strategy Recommendations

The 2018 RTO Strategy updates the RTO program by:

- Restructuring the competitive grant program into a results and capability-based funding allocation, enabling Metro to provide more reliable funding to proven partners.
- Actively developing deeper and additional relationships with local governments and community organizations to engage new audiences and expand program reach.
- Creating a fund for innovative projects that address transportation system inequities faced by people of color, older adults, youth, people with disabilities, and low-income households, or that test new technologies to provide greater access to travel options in the region.
- Outlining a structure for the new regional SRTS program that involves coordination and collaboration, program development and technical assistance, and direct program delivery.
- Bolstering the Collaborative Marketing Group to serve as the outreach, technical assistance, and information sharing arm of the RTO program for all organizations conducting travel options work throughout the region.
- Creating funding opportunities for partners to conduct their own marketing campaigns and pilot projects.

Implementation

Following adoption of the 2018 RTO Strategy, Metro staff will work with the Transportation Policy Alternatives Committee (TPAC) to develop a funding allocation methodology and work plans based on the direction provided in this Strategy update. The funding principles provide guidance for finalizing funding amounts and for selecting partner projects: funding allocations will be based on the potential for promoting travel options, partners' capability and readiness, equity needs in the community served, and partner readiness for implementing the activities. Projects that meet multiple of these criteria (i.e. projects in an area with high potential for VMT reduction and that serve equity needs) should be prioritized for funding.

Conclusion

The 2018 RTO Strategy defines a ten-year mission, goals, and objectives to coordinate, implement, and evaluate local partners' efforts that help achieve regional air quality, transportation, equity, and livability goals. To overcome challenges experienced in the past, and to form new partnerships to better reach new audiences, this Strategy re-envisions an RTO program that works collaboratively with local government agencies, school districts, community-based organizations, and the private sector.

This Strategy provides the guidance and approach to help Metro staff work with TPAC to define a program that is flexible and forward-thinking while attuned to the community's needs. Over the next ten years, this Strategy will guide Metro in working with community partners to create a more healthy and livable Portland region.

SECTION 1: INTRODUCTION

The Portland metro region's population is expected to grow dramatically over the next ten years. Maintaining a functioning transportation system requires new approaches to reduce the number of trips made driving alone. If we succeed, we will not only preserve mobility, but also reduce congestion, improve air quality, increase residents' access to travel options, and enable all community members to get to jobs and services. Infrastructure investments alone cannot meet the demand for new travel – we lack the land and the funding to build our way out of congestion. Metro recognizes that managing demand is an important complement to investing in infrastructure.

The RTO program strives to create healthy, vibrant neighborhoods by:

- improving the quality of the air we breathe
- reducing car traffic
- creating more opportunities for people of all ages and abilities to walk, bike, take transit, and carpool
- making the most of transportation investments by promoting their use

The program works closely with partners such as public agencies and local community-based groups who implement the strategy at a local level.

Metro's Regional Travel Options (RTO) program is the regional "brand name" for transportation demand management (TDM), which aims to change people's travel behavior through programs and outreach. TDM works in conjunction with infrastructure improvements to reduce the number of single occupant vehicle miles traveled (VMT) and non-auto mode split.

The RTO program funds partners' projects that encourage use of Travel Options, such as the Explore Washington Park program, which encourages visitors to these popular destinations to use transit or a free shuttle rather than driving and parking.

The RTO program's charge is to reduce demand for driving alone and to promote travel options. Reducing the number of vehicle miles traveled provides many livability benefits: cleaner air and water, healthier populations, and safety improvements. The RTO program connects people with the information and support they need to choose affordable, sustainable travel options, such as walking, biking, taking transit, carpooling or vanpooling. The RTO program is a critical strategy for getting the most benefit and use from transportation infrastructure investments. Through grants, event sponsorship, policy guidance, regional coordination, and technical assistance, the Metro RTO program has been serving the region for over 20 years.

From June 2014 to July 2016, Individualized Marketing (IM) campaigns reached over 23,000 residents and reduced over 2 million miles of vehicle travel. The programs reached underserved communities and built partner capacity and strengthened relationships throughout the region.

Over that time, the RTO program has funded effective, community-oriented projects across Clackamas, Multnomah, and Washington counties, including the TriMet Orange Line Individualized Marketing, Sunday Parkways, BIKETOWN sponsorships, and more. During the 2017-2019 grant cycle, 17 projects received $2.5 million in competitive travel options grants. Nearly half the awarded project funds support work that makes it easier for children, families, and college students to walk and bike to school. Other funded projects inspire residents to reimagine the use of streets through community open streets events like Sunday Parkways and temporary installations. Additional projects involve wayfinding, trail counts, employer programs, production of outreach videos, and more. These projects use creative, inexpensive methods to inspire more people to use travel options to get around the region, thereby reducing vehicle miles traveled. The program does not fund shuttle operations or infrastructure projects[3], such as sidewalk or trail construction, as there are other sources of funding in the region for those purposes.

After several decades of positive impacts in the region, the number of people switching to affordable, sustainable travel options has plateaued[4]. The RTO Strategy must adopt new approaches to engage diverse audiences and help achieve ambitious Regional Transportation Plan

[3] The RTO program does fund certain small infrastructure projects, such as bicycle parking, wayfinding signage or other on-street wayfinding elements that make it easier for people to find and use safe routes.

[4] Metro RTO Program Commute Options Report 2013-2016.

(RTP) goals. Metro will continue to work with longstanding government, non-profit, and education colleagues and well as partnering with new groups to broaden the RTO program's reach and impact. The 2018 RTO Strategy outlines this approach and includes a ten-year vision, goals, objectives, and actions.

Changes from the 2012-2017 Strategy

The 2018 RTO Strategy provides direction for the program for the next ten years. It builds on the historic success of the program, addresses challenges, and responds to community needs. The Strategy offers policy direction for establishing a new regional Safe Routes to School (SRTS) program, adapting to new technologies, and prioritizing projects and programs that address transportation system inequities faced by people of color, older adults, youth, people with disabilities and low-income households. It addresses the need for the RTO program to work with new partners to reach more residents throughout the region.

Specifically, the 2018 Strategy updates the RTO program by:

- Restructuring the competitive grant program into a results and capability-based funding allocation, enabling Metro to provide more reliable funding to proven partners.
- Actively developing deeper and additional relationships with local governments and community organizations to engage new audiences and expand program reach.
- Creating a fund for innovative projects that address transportation system inequities faced by people of color, older adults, youth, and people with disabilities or that test new technologies to provide greater access to travel options in the region.
- Outlining a structure for the new regional SRTS program that involves coordination and collaboration, program development and technical assistance, and direct program delivery.
- Bolstering the Collaborative Marketing Group to serve as the outreach, technical assistance, and information sharing arm of the RTO program for all organizations conducting travel options work throughout the region.
- Creating funding opportunities for partners to conduct their own marketing campaigns and pilot projects.

Reading Guide

Search for these icons throughout the report to follow along with key themes:

Safe Routes to School

Equity

Technology

Look for this symbol to learn about key changes from the previous RTO Strategy:

Planning and Policy Context

The RTO Strategy is an element of the Regional Transportation Plan (RTP). The Strategy defines a ten-year mission, goals, and objectives to coordinate, implement, and evaluate local partners' efforts that help achieve regional air quality, transportation, equity, and livability goals. The RTO program provides strategic funding, technical assistance, marketing support, and traveler information and services to governments and organizations. Partners manage and carry out local projects and programs that align with the RTO goals and objectives.

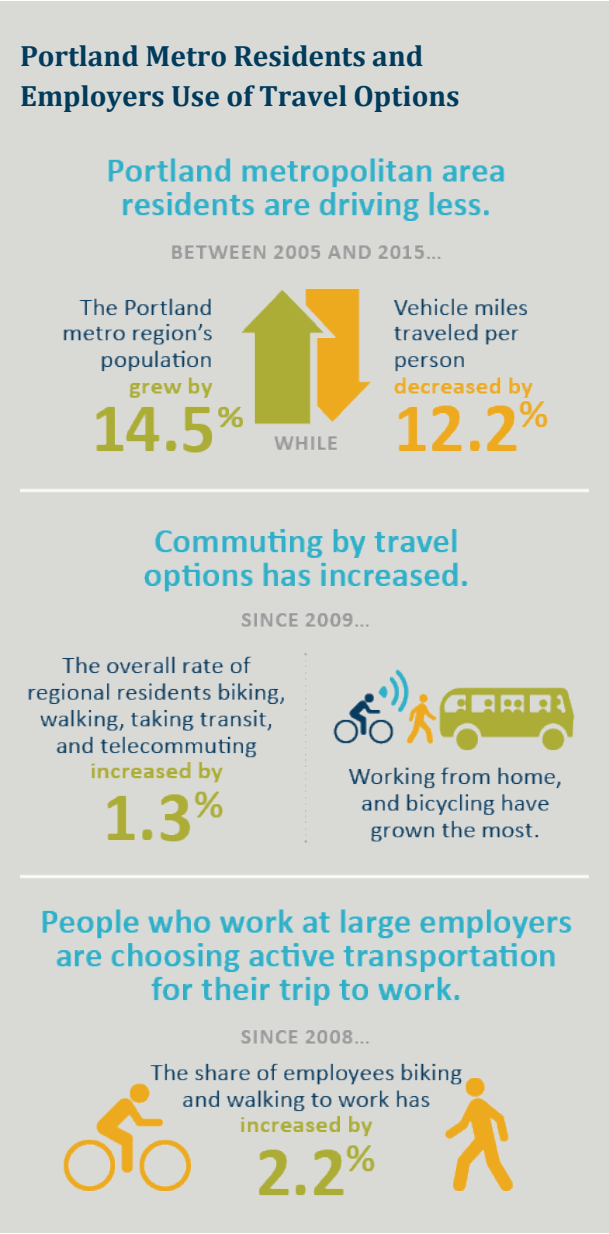
Commute Travel Trends in the Metro Region

The Portland metro region has witnessed modest decreases in single-occupancy vehicle use (see sidebar). However, as the region continues to grow, increased car trips have created congestion that results in regional challenges that the RTO program works to address:[5]

- **Transit and carpool/vanpool rates have declined**. Since 2008, transit mode share has declined by 2.7 percent. A variety of factors have contributed to this; including transit service reductions following the Great Recession, lower gas prices, and the displacement of lower-income residents out of transit-friendly neighborhoods.[6] Carpool/vanpool rates similarly dropped by 1.6 percent.

- **The drive-alone rate has leveled off**. Drive-alone rates for employers involved in the RTO program have remained steady in recent years, with approximately two-thirds of trips to work made by driving alone. With more people moving to the region, an unchanged drive-alone rate means that more cars are crowding roadways.

- **Drive-alone rates vary widely across the region**. Employees in Gresham and in



[5] Metro RTO Program "Commute Options Report" (2017). www.oregonmetro.gov/travel-options-research
[6] "In Portland, Economic Displacement May be a Driver of Transit Ridership Loss" Transit Center. November, 14, 2017. http://transitcenter.org/2017/11/14/in-portland-economic-displacement-may-be-a-driver-of-transit-ridership-loss/.

Downtown, Southwest, and North Portland have decreased their drive-alone rate the most. Forest Grove, areas along Powell Boulevard, Clackamas, and western Beaverton have seen increased drive-alone rates.

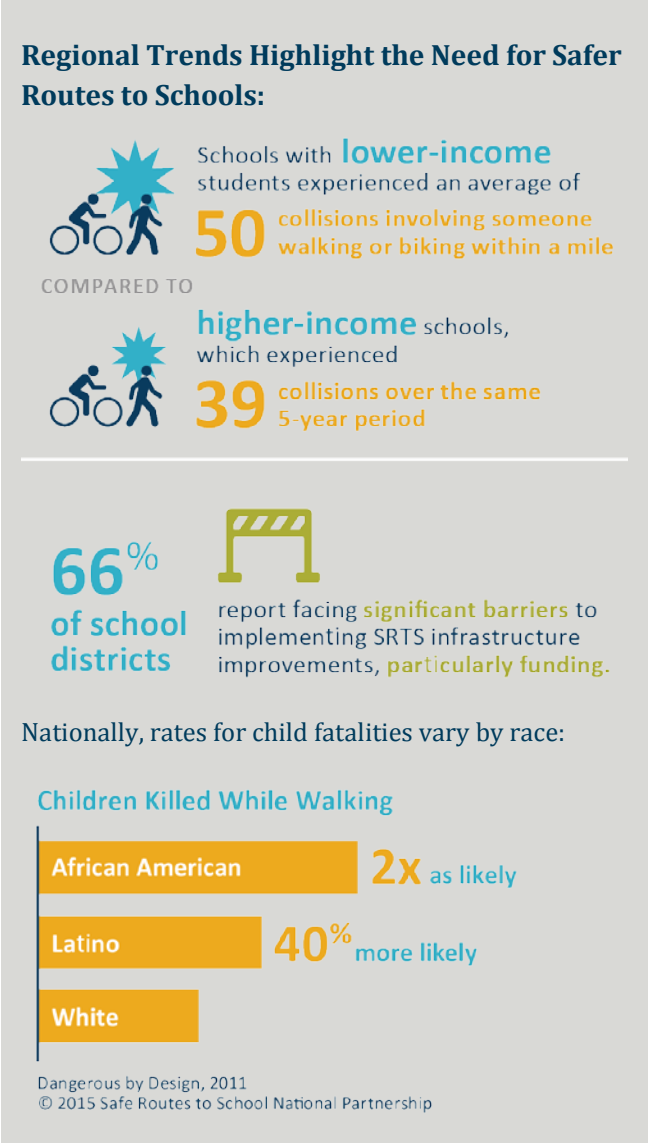
- **Commuting from outside the region is increasing.** In addition to 730,000 of the region's residents commuting daily, there is a rapidly growing number of commuters from outside the region. Housing affordability is the main cause of this. To ensure people can continue to get to work, the growing region must rely not only on new infrastructure projects, but also on successfully promoting travel options, to help increase the efficiency of commuting by giving people choices.

Safe Routes to School in the Portland Region

Safe Routes to School (SRTS) is a national effort to encourage students and families to walk and bicycle to school and to improve health and safety through infrastructure and non-infrastructure improvements. Infrastructure elements include walking and biking facilities, crosswalks, and bike parking. Non-infrastructure (programmatic) elements include traffic enforcement campaigns, walking and biking safety education, encouragement and engagement programs, site assessment, and program evaluation. The most successful SRTS programs incorporate all Six E's: evaluation, education, encouragement, engineering, enforcement, and equity.

The Need for a Regional Approach to SRTS

In 1969, nearly 50 percent of all children in the U.S. (and nearly 90 percent of those living within a mile of school) walked or bicycled to school. Today, that number is less than 15 percent. This shift is likely due to traffic and personal safety concerns, poor infrastructure, lack of information about travel options, new schools being sited in auto-oriented areas, and the cultural prioritization of the personal vehicle. Students of color experience disproportionate fatality rates compared to white students (see sidebar).



In 2015, the RTO Program launched a SRTS campaign highlighting a promotional video. Metro Staff worked with Portland, Gresham, and Washington County schools to create the video and promote a unified message around the benefits of SRTS

SRTS programs are a proven way of changing travel behaviors and shifting modes toward active transportation options. SRTS programs can increase physical activity, reduce congestion, boost academic performance, improve health, save families money, and provide environmental benefits in an equitable way. When implemented on a regional scale, they can help address regional needs and outcomes through coordinated programs that provide support to cities, counties, and school districts.

Regional coordination is necessary to help cities and school districts work together across boundaries. Communities in the Portland metro region use funds from multiple sources to launch SRTS education, promotion, and enforcement campaigns in elementary, middle, and high schools. At the local level, SRTS practitioners run education and encouragement programs with families and schools, while cities and counties work with schools to identify and fund infrastructure projects near schools. Municipalities support these efforts by hiring coordinators, developing pedestrian and bicycle facilities, and establishing policies to support safe walking and bicycling. SRTS requires participation from multiple agencies and departments from the county, city, school district, and community-based organizations so coordination improves communication and information sharing across the region.

School Travel and SRTS in the Portland Region

In the greater Portland region, cities and school districts have been independently involved in SRTS efforts for many years. The RTO program has funded SRTS educational projects since the 2015-2017 grant cycle. With diminished federal funding for SRTS since 2012, local jurisdictions are increasingly seeking financial assistance for funding SRTS activities. However, Metro's previous level of funding was not enough to keep up with community demand for SRTS programs. In June 2016, in response to these dynamics and advocacy from the For Every Kid Coalition, Metro allocated $1.5 million through the 2019-21 Regional Flexible Funds Allocation (RFFA) to be spent on SRTS education programs through the RTO program. In October 2016, Metro released the *Regional Safe Routes to School Framework*, which provides data on current and historic funding and programming, identifies the schools with the greatest need for safety improvements, and proposes ways Metro can support local jurisdictions' efforts around SRTS and how families get to school.

History of the RTO Program Structure

The RTO program, established in the 1990s, is primarily funded through allocation of RFFA funds. The federal funding source is the Surface Transportation Block Grant Program (STBG), which is administered by the Federal Transit Administration (FTA). Additionally, the Oregon Department of Transportation (ODOT) funds marketing, community outreach, and SRTS via STBG funds administered by the Federal Highway Administration. The RTO program funding levels for 2019-2021 are approximately $3.3 million annually.

The RTO Program Decreases Driving Alone Trips

Although the RTO program historically accounts for only one half of one percent of the region's transportation spending, its impacts are large and widespread. Since tracking of the program began in 1997, the use of walking, biking, transit and rideshare at businesses that work with the program's partners has risen from 19 percent to 39 percent, far above the national average.

During the 2011-2013 grant cycle, more than 84,000 people from around the region reduced their driving by 47 million miles. That is the equivalent of 1.7 million trips from Beaverton to Gresham that did not happen thanks to help from RTO funding.

The RTO program has evolved over time. TriMet originally administered the program, focusing on promoting transit use and assisting employers with compliance with the state Employee Commute Options rule to reduce commute trips. In the 1990's, the program expanded to support Transportation Management Associations (TMAs) to help with this goal. In 2006, as the program grew beyond its initial commuter outreach emphasis to include all trip purposes, TriMet and Metro agreed to transfer program oversight to Metro. Metro broadened the focus and incorporate residential outreach (individualized marketing or IM) to help people choose non-Single Occupancy Vehicle (SOV) travel options for different trip purposes. During this time, the RTO program included dedicated, performance-based grant funding for TMAs, an IM grant, a small budget for competitive grants, and dedicated funding for the South Metro Area Regional Transit (SMART) commuter outreach, and TriMet's Employer Travel Options Program. In 2012, Metro combined TMA and IM funding into a biannual competitive grant program. TriMet and SMART continued to receive a set-aside to run their travel options programs. In 2019, the program will begin allocating dedicated funding for SRTS investments as well as implementing other funding recommendations in this Strategy. Figure 2 shows a timeline of the RTO structure and focus.

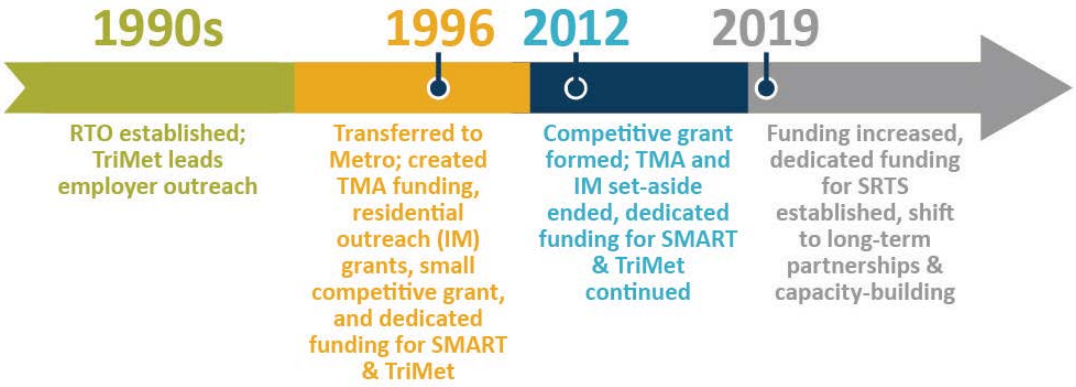


Figure 1. Timeline of RTO Structure and Focus

RTO Project Categories

The RTO program currently funds five main project categories:

1. **Employer-based services** shift commute travel behaviors to non-SOV modes (such as walking, biking, carpooling, vanpooling, public transit use) by marketing through employers. Employer-based outreach in the region has historically been focused on large employers (over 100 employees). However, Portland and other regional cities are increasingly working with mid-sized employers (20 to 100 employees) in order to reach more commuters. Figure maps RTO-funded Commute Options Sites.
2. **Community-based services** shift travel behaviors away from SOV use for non-commute travel through community-based events and activities. Community-based outreach programs address the more than 70 percent of non-commute trips taken in the Metro region. Most of these trips are less than five miles, so walking, biking, or taking transit are good alternatives to driving. Figure maps community-based outreach investments.
3. **Safe Routes to School** programs seek to shift school travel to non-SOV modes for K-12 school schools through education, encouragement, enforcement, and engineering approaches. Figure maps SRTS non-infrastructure investments funded through the RTO program and other sources.
4. **Traveler information and services** create new sources of information to help people become aware of and use non-SOV modes. These include light infrastructure projects such as bike parking and wayfinding signage.
5. **Planning** projects develop a local approach for implementing RTO programs. This type of project can be a component of a Transportation System Plan or other guiding policy document.

The **Collaborative Marketing Group** is the outreach and marketing assistance arm of the RTO program. It has evolved over the past decade from a subcommittee of Metro's Transportation Policy Alternatives Committee (TPAC) into a regional forum that brings partners together to share information, collaborate, and implement regional marketing projects, and learn best practices for conducting outreach, communicating messages, and evaluating programs.

The RTO program supports partner campaigns like the Oregon Department of Transportation (ODOT)'s Oregonian Crossing campaign.

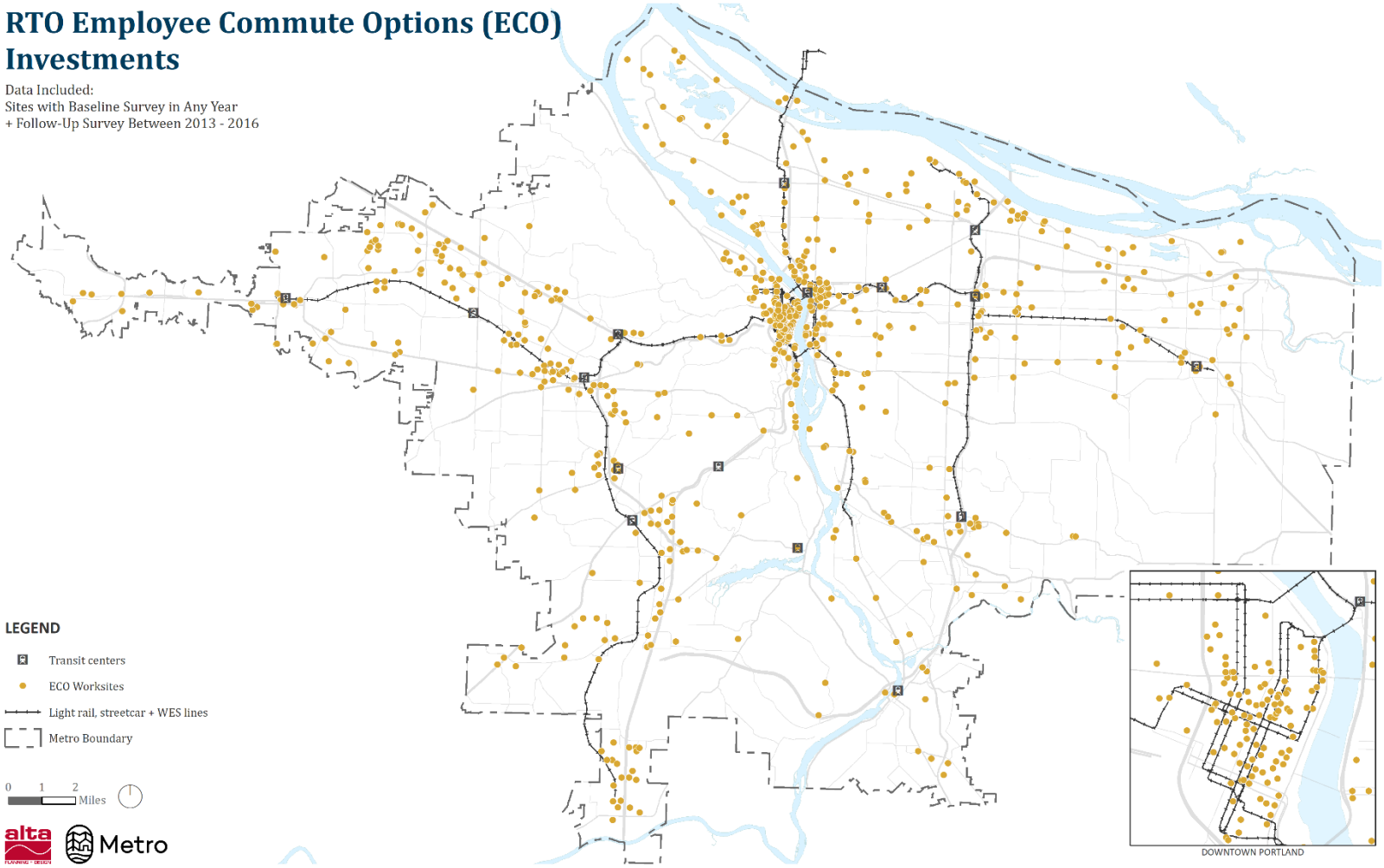


Figure 2. RTO-Funded Employer Commute Options Sites

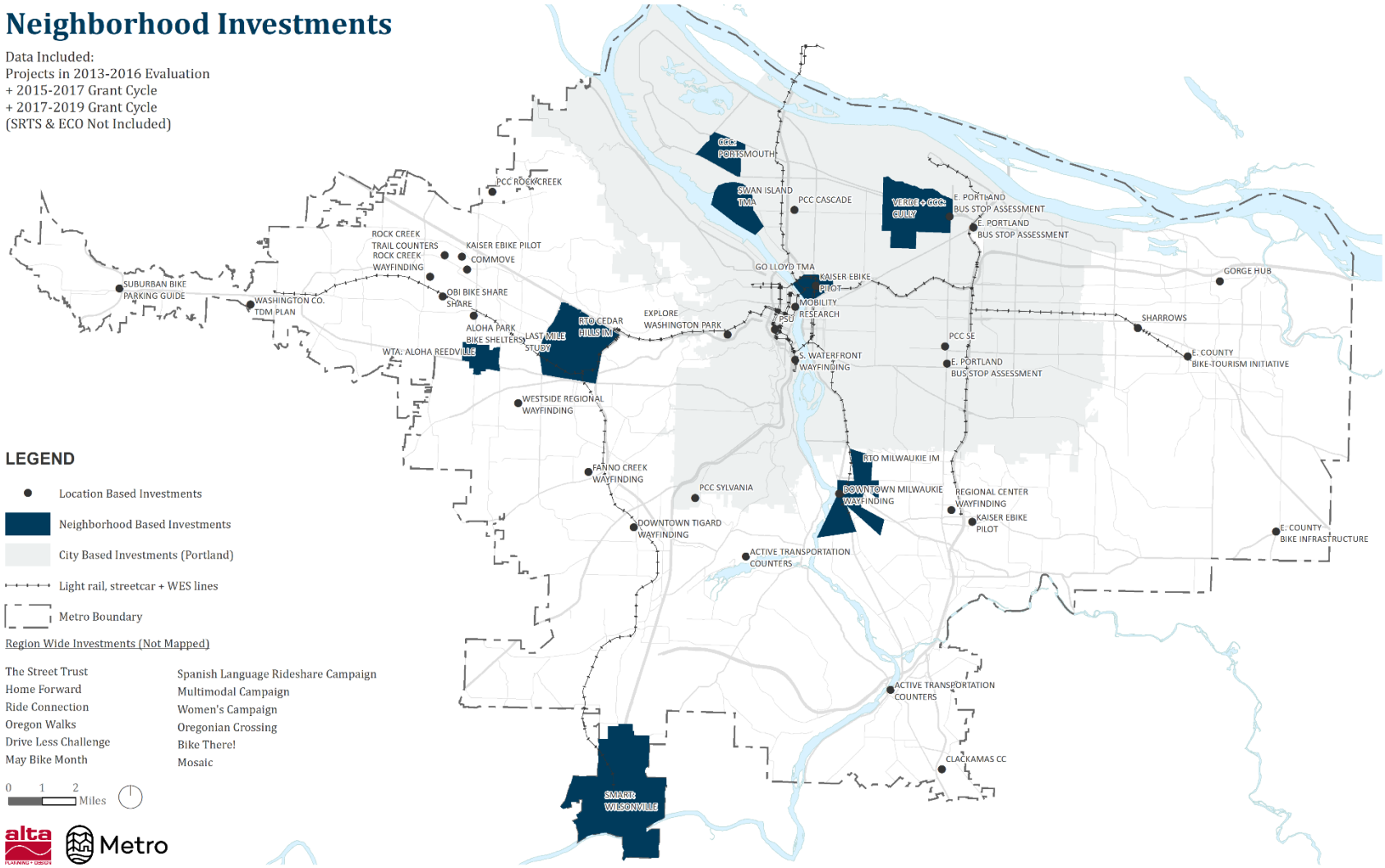


Figure 3. RTO-Funded Community-Focused Travel Options Investments

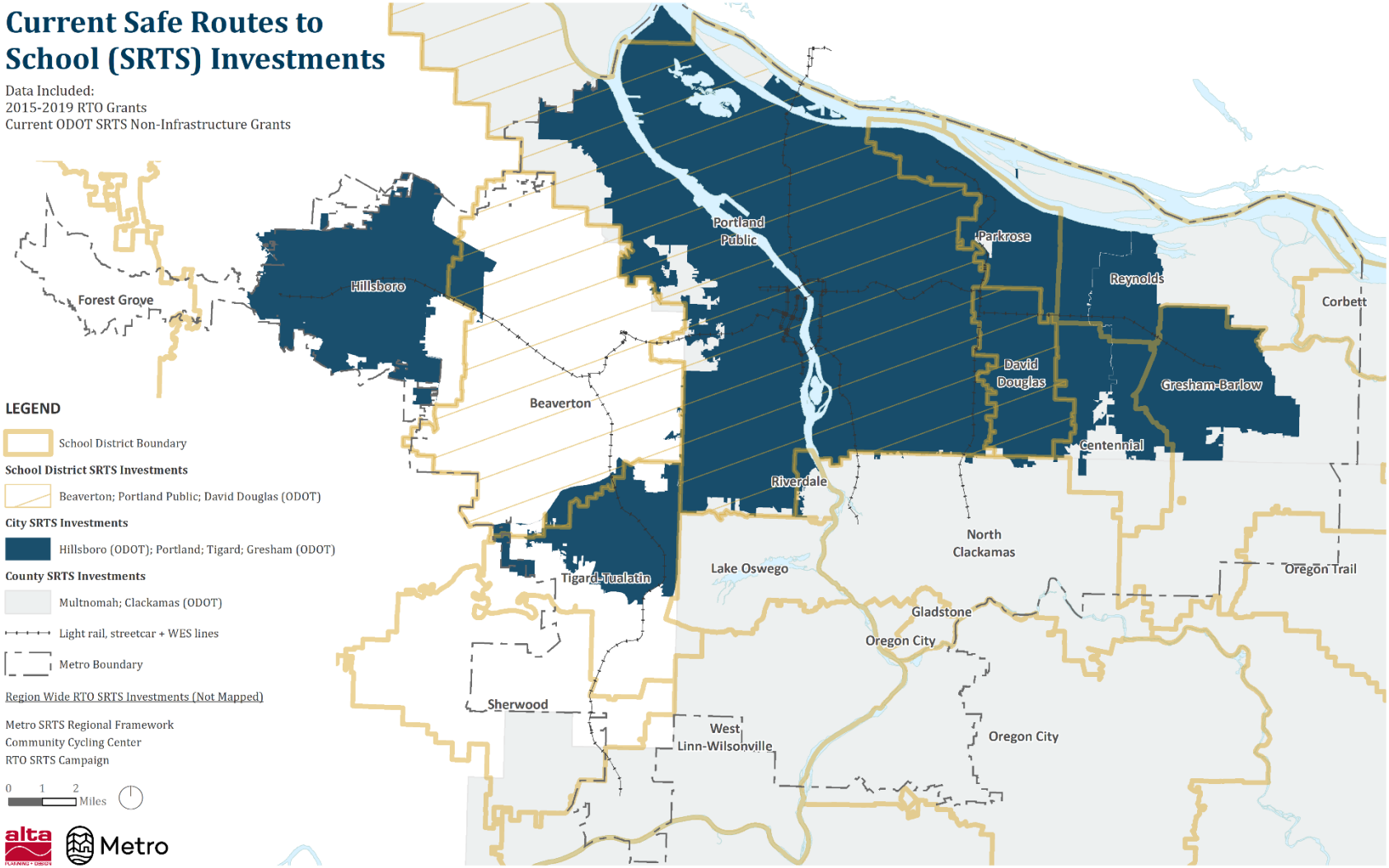


Figure 4. SRTS Non-Infrastructure Investments in the Portland Metro Area

Planning Process and Engagement

To create an RTO Strategy that furthers the goals and objectives of the RTP, while meeting the needs of different organizations and jurisdictions working in the region, Metro carried out a robust, dynamic public outreach process from August 2017 to February 2018. This process was designed to complement funding scenario planning, best practices research, and policy development. Figure shows the full RTO Strategy Update process. The project outreach had three main components:

- Five workshops on key topic areas to understand partners' needs related to suburban communities, technology, SRTS, marketing and communications, and new partners
- 17 interviews with key stakeholders, including past and present partners, new partners who have not previously participated in the RTO program, and topic area experts
- Two opportunities for partners to comment on the draft RTO Strategy Update

Who Participated in the 2018 RTO Strategy Update Outreach Process

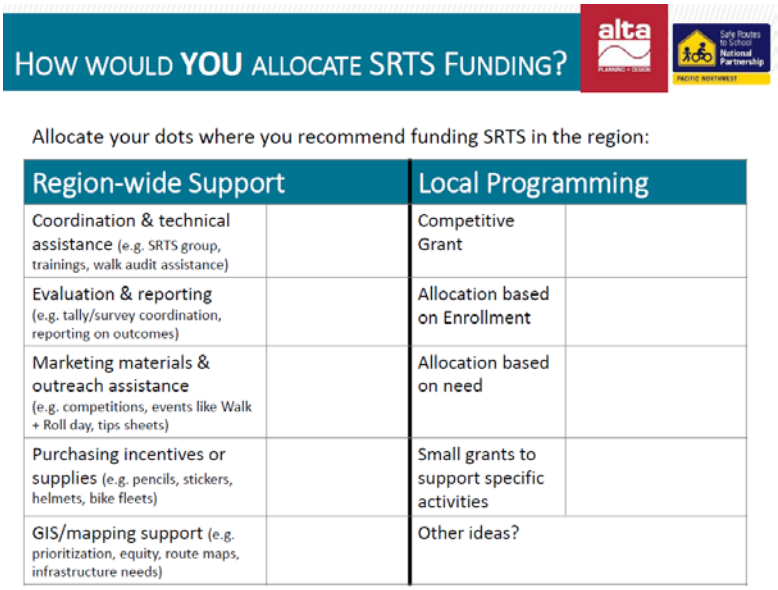
Project outreach focused on counties, cities, colleges/universities, school districts, and community-based organizations. These groups/partners were selected for engagement because they had managed or applied for a Metro RTO-funded project, because they work to encourage travel options through their work, and/or because they engage audiences that Metro would like to reach more effectively. The project team also engaged with private technology companies on a targeted basis as well as peer regional governments to learn from their topic area expertise. Selected organizations were invited to a phone interview, while all stakeholders were invited to attend workshops and review the draft Strategy.

Figure 5. RTO Strategy Planning Process

The RTO Strategy Update process had strong participation from groups who had previously received RTO funding or were already familiar with RTO through their work. The project team did more targeted recruitment to identify and engage community-based organizations and other groups that may not have worked with the RTO program directly but are doing relevant work or reaching communities of interest. In response to lower turnout for the Potential Partners workshop, the project team followed up with groups individually to conduct interviews and ensure a broader representation of voices and ideas.

Topic Area Workshops

Metro hosted five topic area workshops for current RTO partners and other interested groups, summarized in Table 1. The selected topics reflect Metro staff's recommendations and were approved by TPAC and the Joint Policy Advisory Committee on Transportation (JPACT). These specific topics were chosen as priorities for the 2018 RTO Strategy to address flat-lined program results, Metro's Equity Strategy, planning direction from the RTP and Climate Smart Strategy, SRTS policy direction from the 2019-21 RFFA, and alignment with Metro's emerging technology strategy. Each workshop featured an overview of the RTO program and RTO Strategy Update process, facilitated small and large group discussions on the specific topic area, and a report-back session to foster learning among participants and project team members.



Participants at the SRTS workhop voted with sticky dots on their top funding priorities.

Table 1. Summary of Topic Area Workshops

Topic Area	Date	Number of Attendees	Topic Area Presenters
Suburban Communities	August 14, 2017	21	Derek Hofbauer, Alta Planning + Design Hannah Day-Kapell, Alta Planning + Design
Technology & Public-Private Partnerships	August 25, 2017	32	Elliot Rose, Metro
Safe Routes to School	September 29, 2017	27	Hannah Day-Kapell, Alta Planning + Design Kari Schlosshauer, SRTS National Partnership
Collaborative Marketing Group	October 23, 2017	25	Marne Duke, Metro Chris Watchie, Cogito
Potential New Partnerships	October 23, 2017	10	Hannah Day-Kapell, Alta Planning + Design

Stakeholder Interviews

Through 17 interviews with organizations and jurisdictions, potential partners, and topic area experts, stakeholders provided insights on their experiences with the RTO and ideas for the future direction of the program. Some interviewees had received RTO funding in the past or were current partners; others had never received funding or had never applied for funding. Two unique groups were included in interviews: the Sacramento Area Council of Governments (SACOG) and Via Transportation. SACOG provided insights into how the agency has engaged with the private sector to promote travel options, based on recent investments in a new TDM strategy. Via Transportation is a ridesharing company that has experience partnering with local governments to implement creative rideshare and transit models. Representatives from these two groups were interviewed to suggest best practices and ideas for the Metro RTO Strategy Update.

Interview questions were tailored to the type of stakeholder. Each interview with a current or historic grantee covered personal experiences with the RTO program, what is working well, challenges groups are facing, and ideas for moving RTO forward. Interviews included questions about both technical/administrative aspects, such as how funding is managed, and more thematic aspects, such as what type of projects the RTO Strategy prioritizes.

Table 2. Stakeholders Interviewed

Past/Current Partners	Potential New Partners	Others
Beaverton School District	AARP	Sacramento Area Council of Governments (SACOG)
City of Gresham	Asian Pacific American Network of Oregon	Via Transportation, Inc.
Clackamas County	Immigrant & Refugee Community Organization (IRCO)	
Community Cycling Center	Mercy Corps Northwest	
Ride Connection	OPAL Environmental Justice Oregon	
TriMet	Portland State University's Institute on Aging	
Washington County	Rosewood Initiative	

Comment Opportunity

The public comment draft was posted from February 7th to February 28th. The public review draft was posted on Metro's website and send through several emails. Fifty-seven comments from nine organizations (ODOT, PBOT, Washington County, City of Gresham, Westside Transportation, Alliance, The Street Trust, TriMet, and Reach Now) were received from stakeholders who had been engaged in the Strategy update process.

SECTION 2: REGIONAL TRAVEL OPTIONS POLICY

2018 RTO Strategy Vision, Goals, and Objectives

The RTO Program's vision is to make the Portland metro region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation use, are environmentally sustainable, and benefit all greater Portland metro area residents.

The goals support this vision by providing direction for the RTO Program:

- Goal 1: Increase access to and use of travel options to reduce vehicle miles traveled, provide cleaner air and water, improve health and safety, and ensure people have choices for travelling around the region
- Goal 2: Reach existing and new participants more effectively by expanding the RTO program and working with new partners
- Goal 3: Encourage families to walk and bicycle to school safely by implementing a regional Safe Routes to School Program
- Goal 4: Measure, evaluate, and communicate the RTO Program's impacts to continually improve the program

The following sections describe the specific goals, objectives, and actions that will guide Metro for the next ten years. RTO will follow future RTP policy during the ten-year timeframe of this RTO Strategy, which may result in changes to some of the goals and implementation efforts.

The **Climate Smart Strategy** is a regional strategy that responds to a state mandate for a 29 percent reduction in per capita greenhouse gas (GHG) emissions from cars and small trucks by 2035. Key recommendations related to the RTO program include:

- Implement adopted local and regional land use plans
- Make transit convenient, frequent, accessible, and affordable
- Make biking and walking safe and convenient
- Make streets and highways safe, reliable, and connected
- Use technology to actively manage the transportation system
- Provide information and incentives to expand the use of travel options

2018 RTO Strategy Performance Measures and Targets

Performance measures and targets provide an incremental approach for reaching regional goals. Each goal has targets and corresponding performance measures, which track the progress toward meeting targets. As the program contributes to meeting each target, the region gets closer to realizing its long-term goals for equity, sustainability, economic vitality, and livability.

Goal 1: Increase access to and use of travel options to reduce vehicle miles traveled, provide cleaner air and water, improve health and safety, and ensure people have choices for travelling around the region

Objective 1.1: Reduce the number of trips using personal, single-occupancy vehicles by educating and encouraging the public to drive less and utilize walking, biking, carpooling, vanpooling and public transit.

Action Item	Actions	Lead	Partners
a.	Invest in employer-based outreach projects in proportion to potential for promoting travel options, partners' capacity and readiness, and equity considerations.	Partners	Transit operators Transportation Management Associations Colleges & universities Cities with large employment bases Private sector partners
b.	Invest in community-based outreach projects in proportion to partners' capacity, past performance in promoting travel options, readiness for project delivery, and community need.	Metro	Cities Counties Colleges & universities Large employers
c.	Provide funding for new travel options in the form of small infrastructure projects that promote and support multi-modal trips.	Metro	Cities Counties Colleges & universities Large employers

Increasing the use of travel options and reducing single occupancy vehicle (SOV) trips decreases vehicle miles traveled (VMT), resulting in improved air and water quality, reduced congestion, and increased public health benefits. The RTO program is one element of the larger regional approach to achieving VMT reduction goals, working along with infrastructure and service improvements, pricing, and other approaches.

Employee-focused programs are an effective way to promote travel options. As of 2016, 6.6 percent of employees participating in RTO programs walk or bike to work and another 13.3 percent take transit (Figure). Employees at surveyed employers have reduced over 58 million vehicle miles travelled each year, which saves 28,000 metric tons of greenhouse gas emissions. The RTO program builds on this regional momentum to shift commute trips away from SOV.

Non-commute trips are also important in reducing SOV trips, as more than 70 percent of the trips residents take in the Metro region are not for commuting. Most non-commute trips are less than five miles, meaning that many could be made by walking, transit, or bicycling.

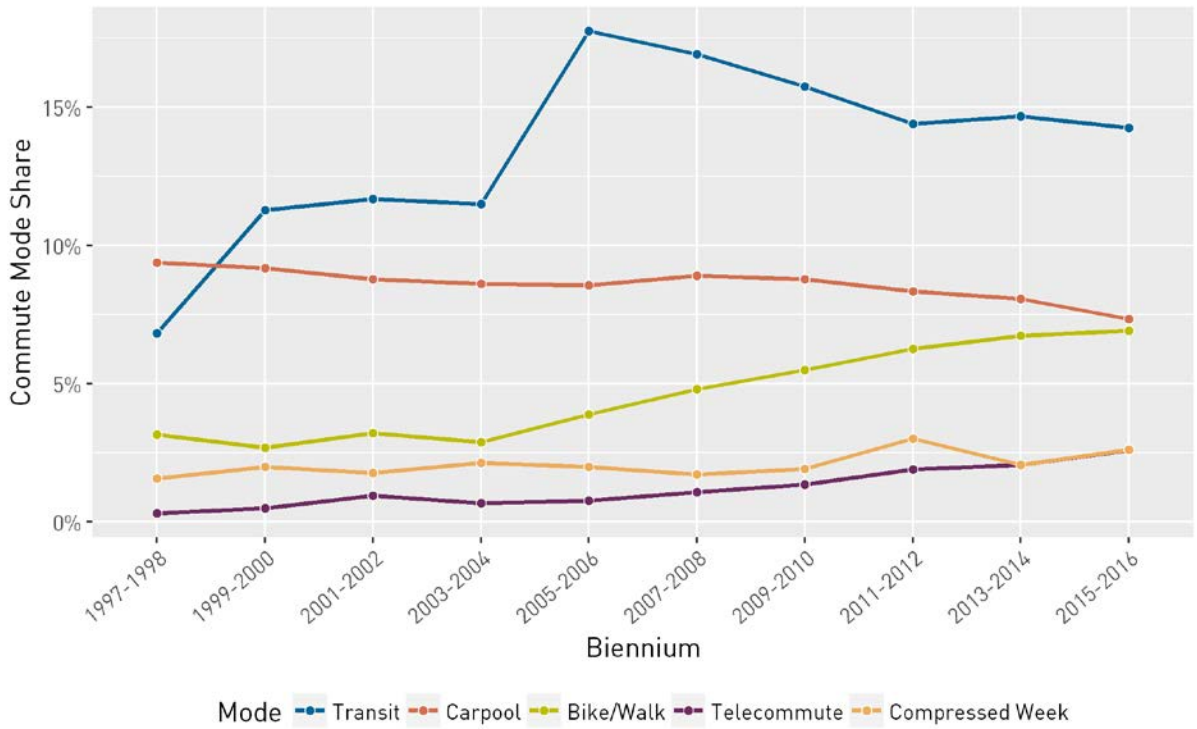


Figure 6: Employer Commute Options Participants' Non- SOV Commute Mode Shares Over Time (1998-2016)
Source: 2013-2016 RTO Program Evaluation

Goal 1 Performance Measures

To track progress in shifting trips to transit use, carpool/vanpool, walking, biking, or telecommuting, the RTO program should continue collecting Employee Commute Options (ECO) survey results and surveying the impacts of funded activities, shown in Table 3. Similarly, the program should continue calculating the vehicle miles reduced (VMR) by participants, as a basis for calculating the cost-savings, environmental, health, community, and other benefits of reducing vehicle use.

Table 3. Goal 1 Performance Measures

Performance Measure	Baseline	2028 Target	Data Collection Method
Non-Single Occupancy Vehicle (SOV) commute rate for communities participating in RTO-funded activities	33.7% (2015-2016 biennium)	40% by 2028	ECO data, Individualized Marketing Campaign results, local implementation results
Vehicle Miles Reduced (VMR) for communities participating in RTO-funded activities	47 million vehicle miles traveled (VMT) reduced per year (2015-2016 biennium)	To be calculated	ECO data, Individualized Marketing Campaign results, local implementation results

Goal 2: Reach existing and new participants more effectively by expanding the RTO program and working with new partners

Objective 2.1: Build partners' travel options capacity and expertise regionally.

Action Item	Actions	Lead	Partners
a.	Continue hosting the RTO Collaborative Marketing Group to share best practices and lessons learned between practitioners.	RTO Collaborative Marketing Group	All partners
b.	Develop marketing and outreach materials targeted to employers (making the business case) and employees for partners to use to promote non-single-occupancy vehicle modes.	RTO Collaborative Marketing Group Contractors	Transit operators Transportation Management Agencies Colleges & universities Cities with large employment bases
c.	In partnership with communities, develop marketing and outreach campaigns, including individualized marketing, and community-based travel option education, for new residents or other identified audiences.	RTO Collaborative Marketing Group Contractors	Cities Counties Colleges & universities Large employers Community-Based Organizations
d.	Support partners attending and participating in the RTO Collaborative Marketing Group, including encouraging participation from new partners, providing onboarding support, offering scholarships for training opportunities and supporting partner marketing efforts.	RTO Collaborative Marketing Group Contractors	Cities, counties, and community-based organizations with little previous travel options experience or capacity
e.	Provide technical assistance and resources to assist partners in advancing along the capability index.	Metro Contractors	All partners

RTO-funded programs help forge new relationships with community members and local organizations, reaching more people than they could have alone, and creating a ripple effect through their communities that continues to encourage the use of travel options long after the end of the funding cycle. Metro can partner with many organizations to implement the RTO program, including transit agencies, cities, counties, colleges and universities, large employers, community-based organizations, advocacy groups, and others. Metro can also consider working with partners that are outside the region, as there is an increasing number of commuters in the region that are choosing to live outside of the Metro boundary.

Depending on the partners' capability level (see page 42 in Section 3: Implementation), the RTO program can provide resources and funding to support existing successful activities, or help partners plan for and establish new Travel Options encouragement programs.

Travel Options Marketing Coordination

The Collaborative Marketing Group (CMG) is the marketing, outreach, professional development, and research group for the RTO program. The group started as a subcommittee of Metro's TPAC over a decade ago. Since then, the group has expanded its focus from reducing commute trips to reducing single-occupancy-vehicle travel across many different types of trips. The group now serves as a regional forum to provide partners with marketing tools for communicating travel options messages and evaluating programs. Regular meetings bring partners together to learn from each other, access resources, and grow the regional RTO network.

The group focuses on and provides support for the following marketing tactics:

- Marketing support, including individualized marketing campaigns
- Written and visual online content
- Shared travel resources
- Contests and challenges
- Printed marketing materials

What we heard from partners:

The key strengths of the Collaborative Marketing Group (CMG) are:

- Its ability to reach a wide audience with marketing campaigns and boost partner communications to reach a wider network
- Its role to curate research and best practices so that partners can easily adopt cutting-edge marketing strategies with a proven behavior change track record

The CMG could further support partners by:

- Providing data, maps, translation services, graphic design support, material templates, and additional trainings
- Facilitating partnerships and relationships throughout the region

Based on workshop feedback, current participants in the CMG value the opportunities and materials that the CMG provides. Organizations and jurisdictions currently managing an RTO grant are the most frequent participants. Interviews with partners indicated that community-based groups and jurisdictions need additional support and resources in order to participate in CMG activities and work on travel options projects.

As the CMG evolves, the group will further expand to include other regional community-based organizations and groups for travel options promotion. As shown in Figure 7, organizations and groups can participate on many levels to effectively build capacity build to change regional travel behaviors.

Collaborative Marketing Group Participation Activities

LEVEL OF ENGAGEMENT*

TIME COMMITMENT: Small → Big

Low	Medium	High
Attend CMG meetings	—	—
Attend CMG workshops and trainings	—	—
—	Distribute safety tools and marketing materials	—
—	Promote digital campaigns internally and externally	—
—	Promote the Oregon Drive Less Challenge	—
—	Participate in RTO Campaigns Work Group	Partner with Metro to implement or extend partner-led marketing/outreach campaign
—	Work with Metro to use TDM planning, design, or translation contractor services	Distribute digital campaigns through paid outlets
—	—	Present program findings at a CMG meeting
—	—	Partner with Metro on an individualized marketing program or campaign

**Organizations can participate in multiple levels of engagement at the same time.*

Figure 7. CMG Participation Levels

Objective 2.2: Allocate RTO resources in a way that prioritizes and impacts communities of color, older adults, youth, people with disabilities, and low-income households.

Action Item	Actions	Lead	Partners
a.	Strategically invest in partners, programs, and continuing education to reach communities of color and other new audiences including people with lower incomes, older adults, youths and people with disabilities, and other historically-marginalized communities.	Metro	Cities Counties Transportation Management Agencies Colleges & universities Community-Based Organizations Contractors
b.	Support small innovative projects to test new ideas for reaching communities of color, low-income households, and other historically-marginalized communities with travel options marketing and information.	Metro	Community-Based Organizations Transportation Management Agencies
c.	Provide information about ways to get involved in the RTO program targeted towards organizations that focus on reaching target communities, regardless of whether they have a transportation focus.	Metro	Community-Based Organizations
d.	Provide translation and interpretation services to partners for use in their program and advise on culturally-competent outreach.	Metro	Community-Based Organizations

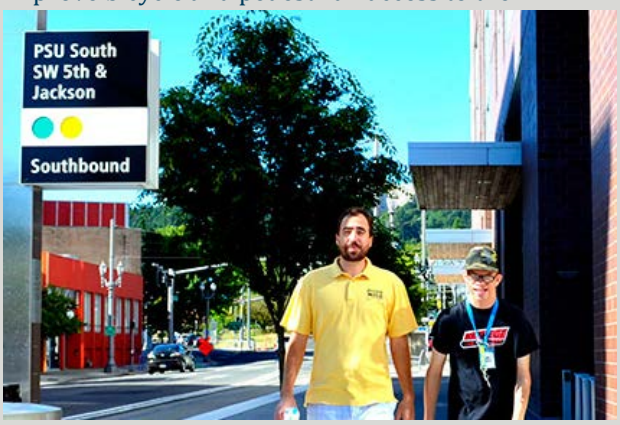
Research has shown that institutional and systemic racism has resulted in people of color facing additional barriers to using travel options. In alignment with Metro's diversity, equity, and inclusion goals, and in response to extensive partner feedback, Metro recognizes the need for a focus on travel options services and information that serve communities of color, youth, people with disabilities, and low-income households. Older adults are also considered when prioritizing equity, as aging populations tend to lack mobility options while needing access to services.

Defining 'communities of color'

Metro's *Strategic Plan to Advance Racial Equity, Diversity, and Inclusion* (2016) defines communities of color as Native Americans, African Americans, Asian Americans and Pacific Islanders, Latinos or Hispanics, and immigrants and refugees who do not speak English well, including African immigrants, Slavic and Russian-speaking communities, and people from the Middle East.

Previous Equity-Related RTO Grants

Verde's Living Cully project aimed to raise awareness of natural areas in the Cully neighborhood and improve bicycle and pedestrian access to them.



Ride Connection's RideWise project provides travel training and travel options counseling to older adults and people with disabilities to encourage using fixed-route public transportation.

The Community Cycling Center's Building Momentum provided mechanic training, bike safety education, a bike repair center, and an earn-a-bike program to low-income communities in Portland.

The RTO Program and its partners help people in these communities use travel options and make using them easier and more comfortable. The region's affordable housing tends to be found in areas with fewer transportation options and higher transportation costs. On average, households in the region spend $11,683 on transportation costs per year, or about 20% of the median income. However, lower income households may spend up to 25% of their incomes on transportation.[7]

It is important to prioritize equity across all RTO activities objectives to ensure that all Metro residents, regardless of race, ethnicity, age, income, or ability, are able to use safe, affordable, sustainable travel options. Though projects that address the needs of these groups may not create the largest reduction in VMT, eliminating disparities between the travel options available to different groups is critically important to the success of Metro's 2018 RTO Strategy.

Overall, the RTO Program decreases car-dependency and prioritizes lowest-cost transportation options. This is one strategy for fighting cycles of poverty, segregation, and displacement.[8] RTO can help create a more equitable region by partnering with community partners to increase access to active modes for communities of color, older adults, youth, and people with disabilities.

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[7] Metro News. Regional Snapshot: Transportation. (April18, 2016). www.oregonmetro.gov/news/you-are-here-snapshot-how-portland-region-gets-around
[8] Metro RTP Goal 9 (2014).

Objective 2.3: Encourage innovation and new technology to increase access to travel options.

Action Item	Actions	Lead	Partners
a.	Increase access to and awareness of new technologies by hosting forums for private sector potential partners to showcase opportunities in the region and make connections between groups.	RTO Collaborative Marketing Group	Cities Counties Transportation Management Agencies Colleges & universities Technology companies Ridematching companies
b.	Make traveler information available to encourage private companies to better integrate travel options for users.	Metro	Cities Counties Transportation Management Agencies Colleges & universities Technology companies Ridematching companies
c.	Pilot applications of new technologies for modes that reduce VMT (e.g., dynamic routing or enhanced traveler information capabilities for shuttles).	Metro	Transit operators Technology companies Ride share companies Ridematching companies

Technology has major implications for the RTO Program. On one hand, information about travel options is easier to access than ever before, and a growing number of technology-based services are making it easier for people to find rideshare, car share, bike share, and transit options.

On the other hand, many emerging technologies and services are likely to increase driving at the expense of other options and are less accessible to communities of color, older adults, youth, people with disabilities, and low-income households. It can also be challenging for Metro and partners to determine what technologies to invest in when the landscape is changing quickly.

The RTO program has funded numerous technology-related projects that provide better information to travelers and better data to partners. The 2018 RTO Strategy takes a more in-depth look at technology; outlining principles for Metro's work with emerging technologies and highlighting the types of projects that can best support the program's goals using newly-available technologies and services. These principles and projects are aligned with the Emerging Technology Strategy that is also included in the RTP.

The RTO Strategy's focus on policy guidance for collaborating with new technology gives Metro's partners more clarity about how to best work with the opportunities and protect against the potential pitfalls. It also provides Metro and partners with learning opportunities about how to better deploy new technologies and services within the RTO program and throughout other work. The evaluation and performance measurement conducted through the RTO program is designed, in part, to give Metro the information needed to learn from how partners are applying new technologies.

Partners' Technology-Related Work

Examples of RTO related technology-related projects:

- The Westside Transportation Alliance (WTA) developed Commove, a mobile app that provides route finding, carpool and other mode matching, benefits tracking, and a competition element.
- Metro and the Oregon Department of Transportation supports Drive Less Connect, which enables commuters to log trips, connect with shared ride options, and track benefits. During the Oregon Drive Less Challenge annual campaign, participants can win rewards for any transportation option used other than drive-alone.
- Ride Connection and TriMet developed the One Call/One Click program that uses new technology tools to better connect people with demand-responsive transit options.
- Several communities are using new bicycle and pedestrian counting devices, including the City of Lake Oswego, Explore Washington Park, and soon Clackamas County and the City of Hillsboro.
- Parking Kitty is a new mobile app that provides payment processing and time tracking for paid parking spaces, first deployed by RTO's partner Explore Washington Park.

Objective 2.4: Coordinate with State and local partners in planning for travel options work.

Action Item	Actions	Lead	Partners
a.	Link RTO efforts to goals outlined in the Metro Regional Transportation Plan (RTP) and the Oregon Transportation Options Plan.	Metro	RTO staff
b.	Coordinate with ODOT on commute option programs and SRTS infrastructure funding and planning.	Metro	ODOT
c.	Support local planning work to better integrate travel options into Transportation System Plans, policies, and other local transportation decision-making.	Metro	Cities Counties
d.	Work with local jurisdictions, businesses, and partners to build local political and staff support and understanding for transportation demand management.	Metro	Cities Counties Transit operators Transportation Management Agencies Colleges & universities Private sector partners

The RTO Program has a long history of working with ODOT and the statewide Transportation Options Group of Oregon (ToGo), as well as neighboring jurisdictions such as the City of Vancouver, Washington. Metro could invite these organizations to attend and participate in the Collaborative Marketing Group meetings to improve coordination.

ODOT distributes funds to nine Transportation Options partner organizations around the state, and Metro serves as the Portland-area partner. Metro staff should continue to work with ODOT to program that funding and align program outcomes and performance measures for ODOT-funded

work with the Oregon Transportation Options Plan and with agency direction. In that capacity, Metro should continue to participate in quarterly Statewide Transportation Options Meetings, to champion the region's interests, exchange information with peers, and track ODOT's Transportation Options policies and funding opportunities. In addition, as Metro expands its role as the regional Safe Routes to School coordinating agency, there are new opportunities to work with ODOT's Safe Routes to School infrastructure and non-infrastructure programs and to prepare regional partners to be eligible to receive state SRTS funding.

Goal 2 Performance Measures

The RTO program staff should continue tracking and reporting on the reach of the program funding and the awareness-building impacts of the work. The Capability Matrix described in Partners' Capability and Readiness for Implementing Travel Options on page 42 will guide program investments as described in the Funding Principles section. Many of these future targets still need to be determined, after the baseline has been calculated and the specific funding strategy adopted.

Table 4. Goal 2 Performance Measures

Performance Measure	Baseline	2028 Target	Data Collection Method
Awareness of travel options and participation in RTO-funded activities	Commuter programs engage with 250,000 employees; other data to be calculated	To be calculated	ODOT Needs and Issues Survey (future), ODOT Annual Participant Survey, RTO Travel and Awareness Survey
Partners' placement on the Capability Matrix	Partner assessment to be developed using the Capability Matrix	To be calculated	RTO partners reporting
Percent of RTO investments targeted to communities of color, older adults, people with disabilities, and/or low-income households	To be collected	To be calculated	RTO records
Identified barriers for communities of color, older adults, people with disabilities reduced, and/or low-income households	To be collected	3-5 targets identified and reduced	ODOT Needs and Issues Survey (future), ODOT Annual Participant Survey
Number of TO staff per capita	To be collected	To be calculated	RTO partners reporting

Goal 3: Encourage families to walk and bicycle to school safely by implementing a Regional Safe Routes to School Program

Objective 3.1: Provide regional coordination and program development to support Safe Routes to School efforts throughout the region.

Action Item	Actions	Lead	Partners
a.	Provide technical assistance such as program development and strategy, interjurisdictional coordination, and other resources to assist county, city, school district, and other partners conducting local Safe Routes to School activities.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
b.	Host periodic Safe Routes to School meetings to share resources, information about policies and funding opportunities, and best practices with practitioners.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
c.	Use the Metro Safe Routes to School Framework equity analysis to prioritize funding, technical assistance, and other resource to identified underserved schools.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations Metro GIS staff
d.	Provide regional mapping and GIS support for local Safe Routes to School efforts, such as mapping previously-identified school projects, identifying high crash corridors and other barriers near schools, and designating recommended walking and biking routes to schools.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations Metro GIS staff
e.	Provide planning support to integrate education work into engineering and planning activities to leverage outreach opportunities.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts
f.	Establish a consistent data collection strategy for Safe Routes to School throughout the region, develop resources to easily collect needed data, and train practitioners on data collection and evaluation.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations

The RTO program is integrating new dedicated funding for SRTS beginning in 2019, creating new opportunities for investment in active transportation programs, events, and marketing specifically aimed at schools and families. (See page 5 for more statistics about the need for and benefits of SRTS.) Regional coordination provides coordinated support for local practitioners with outreach materials, best practices for organizing events, and lessons learned from around the region.

RTO provides a space, structure, and support for an ongoing SRTS Task Force, which brings SRTS practitioners together on a regular basis to share their experiences, talk through challenges, celebrate successes, and discuss opportunities for expanding the reach of SRTS.

Elements of regional SRTS coordination include:

- Adding a SRTS staff person at Metro (0.5 FTE) with third-party contracted support to coordinate SRTS work in the region, support local efforts, and represent the region at the state level
- Host region-wide meetings to bring together practitioners and potentially students to learn from each other, and to identify opportunities for partnering through shared resources, regionally coordinated programs or events, or other opportunities to make the best use of SRTS funding
- Provide technical assistance for local efforts (see following section)

The combination of Metro staff and a outside technical assistance provides the ideal balancing of regional knowledge and Metro-based support with technical expertise and local, practitioner-level knowledge. This provides the flexibility to develop program materials and implementation guidance in the early years, and focus on local program delivery (via counties, cities, and school districts) in later years. The outreach via region-wide meetings and other opportunities is crucial for a successful program, to facilitate local relationships between cities and school districts that have overlapping boundaries.

Program Development and Regional Technical Assistance

Regional technical assistance includes work with local jurisdictions and community-based organizations to help prepare funding applications to fund planning efforts, walk audits, infrastructure improvements, and non-infrastructure programs and coordinators. Technical assistance also includes training materials and hosted trainings to build local capacity for administering programs, support for data collection and evaluation, and marketing and communications support.

Build Local Capacity

A regional SRTS program can create template materials, including curriculum, outreach materials, and guidebooks, and can provide trainings to help local programs understand the toolkit of SRTS activities. A website of existing local and best practice SRTS resources could be shared among local jurisdictions and organizations seeking to develop a SRTS plan, conduct walk audits, seek guidance on liability concerns, or establish a SRTS program.

Prioritize Equity in Programs and Funding

Metro will establish and prioritize equity-focused criteria in Metro funding requirements and program outreach activities to ensure the program reaches youth from communities of color and who have disabilities. Metro can provide data and work with local jurisdictions and community-based organizations to help prepare funding applications to fund planning efforts, walk audits,

coordinator positions, infrastructure improvements and non-infrastructure programs. Assistance should be focused on schools with an identified equity need to promote a fairer distribution of resources.

Translation and Interpretation

Where relevant, SRTS concepts will be translated accurately, consistently, and culturally (rather than word-for-word) throughout the region, which can be achieved by having a central resource providing these translations. Metro can make interpretation services available for programs and outreach events.

Evaluation, Data, and GIS

Metro's regional SRTS program will provide centralized data collection resources, such as materials and training for administering hand tallies and parent surveys, as well as a methodology for tracking events and participation in activities at schools. Metro's GIS and evaluation staff could provide an online repository and interactive mapping of the GIS, demographic, and school participation data collected in the SRTS Framework, and would provide support for grant-writing and reporting needs. Metro's regional SRTS program could also provide support to jurisdictions, schools, and organizations to create GIS-based maps for use in SRTS outreach and program initiatives.

Outreach, Leadership, and Storytelling

Metro will provide support for marketing, outreach, and communications to tell the story of SRTS successes in the region, ensuring audiences include media, elected officials, and the broader public. This could include producing an annual or bi-annual report on the status of SRTS in the region, which would provide background about SRTS resources and progress of the regional program and promote the program to elected officials and the general public. A greater emphasis will be placed on the development of stories from those affected by the Metro funding program. A youth leadership/ambassador program could be established as an element of the program (e.g., JPACT student presentation).

Provide Access to Regional Materials

A regional SRTS program could provide access to infrequently needed materials, equipment, and opportunities. On-bike education requires equipment and space for a small portion of the year. To ensure all students can participate, acknowledging many youth do not own bicycles, Metro could make bike fleets and trailers available, or establish a mini-grant program for these types of program resources. Other resources such as a traffic garden or incentives for implementation could be made available to regional partners.

Objective 3.2: Support local jurisdictions, school districts, and other partners in delivering Safe Routes to School programming.

Action Item	Actions	Lead	Partners
a.	Work with County and City partners to plan for Safe Routes to School programs and coordinate across jurisdictional and school district boundaries.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts SRTS coordinators
b.	Allocate funding to local partners based on capability and the established need for Safe Routes to School services, based on the Metro Safe Routes to School Framework equity analysis.	Metro	Cities Counties School Districts Community-Based Organizations
c.	Support small innovative projects to test new ideas for shifting school commute modes.	Metro	Cities Counties School Districts Community-Based Organizations
d.	Support small on-site school improvements, such as signage, striping, and bike parking.	Metro	School Districts Cities Safe Routes to School coordinators
e.	Develop implementation resources such as guidebooks, templates, curriculum, outreach materials, and trainings for partners to use.	Metro Safe Routes to School coordinator Contractors	Cities Counties School Districts Community-Based Organizations
f.	Offer translation support for locally-produced materials and interpretation for events.	Metro	Cities Counties School Districts Community-Based Organizations
g.	Develop toolkits and purchase incentives to support local partners' hosting Safe Routes to School activities and education/encouragement events.	Metro Safe Routes to School coordinator	Cities Counties School Districts Community-Based Organizations

Local SRTS practitioners housed at counties, cities, and school districts provide on-the-ground assistance to individual schools and coordinate between school districts and local jurisdictions. These SRTS coordinators can implement encouragement campaigns and events like Walk+Roll to School Day and Month, promote Walking School Buses, or host competitions or art contests to encourage walking, biking, carpooling, and taking the school bus. Cities should support these efforts with infrastructure planning and improvements that provide safer walking and biking routes to schools.

Regional coordination of SRTS programs will leverage local SRTS work around the region by providing opportunities for practitioners, school districts, public health officials, city staff, and transportation agencies to learn from each other and build on each other's experiences.

Direct Program Delivery

Local agencies and organizations are best positioned to conduct SRTS work. RTO resources should prioritize programs that benefit youth from communities of color and who have disabilities, and to encourage innovation and new technologies to increase access to travel options. Through a simplified competitive process, direct program delivery will provide resources to communities, agencies, and partners based on need, potential outcomes, and alignment with equity goals.

Contracted technical assistance with community-based organizations will allow for support of funding via one-stop access to resources such as pedestrian/bicycle traffic safety educators and grant-writing assistance for projects that address equity needs.

There are three types of direct program delivery categories for SRTS funding:

- **Local Pass-Through Funding** (SRTS program funding): This funding supports community-based activities that connect youth to education and encouragement opportunities related to school travel. This funding supports those communities already committed to investing in SRTS programs and/or infrastructure projects at schools, based on equity need, past performance, and demonstrated capability.
- **Innovation Funding** (SRTS establishment and innovation): This funding supports small-scale, innovative, or early-stage concepts. Categories include technology, new partners, pilot ideas, and those project ideas with a high potential equity impact. This funding may be requested by partners or Metro staff and will offer a smaller funding amount with additional technical assistance and support. In this category, it is likely projects will not initially obtain similar VMT reductions, as other fully funded programs, but they provide the opportunity to test ideas, bring on new partners not already working on SRTS and to generate potential greater future ROI.
- **School Site Improvements** (SRTS enhancement funding): This funding supports current or past program grants, providing funding for items that assist youth traveling by transit, foot, or bicycle to and from school, such as bicycle parking, wayfinding signage, and street markings at or near schools.

Roles of Metro, Counties, Cities, Districts, and others in Safe Routes to School Programs

A coordinated, comprehensive SRTS strategy for the region contributes to the region's desired livability, equity, economic, safety, and sustainability outcomes, as well as public health goals. While ongoing SRTS efforts focus on transportation and behaviors at individual schools and school districts, a regional approach for SRTS can better coordinate efforts, establish best practices, and reduce administration and program development costs.

Metro can support SRTS by:

Regional SRTS Coordination

- Hire SRTS staff
- Host region-wide meetings
- Coordinate efforts between jurisdictions and school districts

Program Development and Regional Technical Assistance

- Build local capacity to carry out programs
- Prioritize equity in programs and funding
- Offer translation and interpretation
- Support evaluation, data, and GIS
- Provide assistance and resources for outreach, leadership, and storytelling
- Provide access to regional materials and equipment

Direct Program Delivery

- Local pass-through funding to counties, cities, school districts, health departments, or CBOs
- Innovation funding
- School site improvements

Counties and Cities can support SRTS by:

SRTS Coordination

- Adding a SRTS coordinator staff position
- Provide matching funds for SRTS coordinators working at a city, county, school district, or CBO
- Be an active participant or a convener of a SRTS Task Force
- Notify schools when a transportation project is in within 1/2 mile of an elementary school or one mile of a middle school

Program Development and Technical Assistance

- Seek funding and prioritize infrastructure projects around schools with a high percentage of students from communities of color or who have a disability
- Facilitate surveys and data collection and interpretation
- Generate projects for city, state, and federal SRTS infrastructure projects
- Develop a pilot program to promote safety and increase compliance with traffic laws near schools
- Direct program delivery
- Provide pass-through funding to schools and CBOs

School Districts can support SRTS by:

SRTS Coordination

- House a SRTS coordinator on staff
- Be an active participant in or convene a SRTS Task Force

Program Development and Technical Assistance

- Provide information to cities or counties about infrastructure safety needs around schools
- Encourage teachers to walk and bike for field trips and provide teachers and staff with a how-to guide for holding this type of field trip
- Direct program delivery
- Implement school district-wide SRTS activities and support individual school's efforts

Other community-based organizations can support SRTS by:

SRTS Coordination

- Work with school districts and cities/counties and house a SRTS coordinator on staff
- Be an active participant or a convener of a SRTS Task Force

Program Development and Technical Assistance

- Support SRTS efforts by contributing data, translation/interpretation, communications, community outreach expertise, or other specialties
- Direct program delivery
- Implement SRTS activities and support individual school's efforts

Goal 3 Performance Measures

With the new dedicated funding for SRTS, the RTO program evaluation will include metrics that specifically address school travel, outreach, and program development. Evaluation of SRTS projects typically rely on parent surveys and student hand tallies that collect data about families' travel modes as well as parent's concerns about walking and biking. Metro will provide guidance for consistent SRTS data collection and reporting throughout the region, enabling local programs to quickly and efficiently collect data, adapt their programs, and report back to the public. A regional SRTS program could also provide support to jurisdictions to collect data or coordinate travel surveys. SRTS program evaluation should take into consideration slower, more incremental mode shift changes, and where possible integrate qualitative data and success stories about building momentum, establishing relationships and partnerships, and developing a network of school, parent, and community partners who will support and host events.

Table 5. Goal 3 Performance Measures

Performance Measure	Baseline	2028 Target	Data Collection Method
Non-SOV school commute mode share for schools participating in RTO-funded activities	To be collected	To be calculated	Parent surveys and student hand tallies collected by local partners
Number of jurisdictions or school districts with formalized SRTS programs	8 jurisdictions or school districts have a SRTS coordinator	All jurisdictions or school districts have or work with a SRTS coordinator	Local SRTS Coordinator reporting
Number of SRTS Coordinator positions in the region	8 SRTS coordinators in 2017	All districts have access to a coordinator (may not be housed at the district)	SRTS Coordinator reporting
Reach of SRTS programming (number of students involved in SRTS activities)	To be collected	To be calculated	SRTS Coordinator or grantee reporting

Goal 4: Measure Program, Evaluate Impacts, and Continually Improve the Program

Objective 4.1: Evaluate RTO grants and funded programs to pursue a suite of RTO-funded activities that collectively achieve program-wide goals and align with state Transportation Options Plan performance measures.

Action Item	Actions	Lead	Partners
a.	Continue using a variety of approved data to evaluate how individual program components contribute to overall program goals.	Metro RTO evaluation team	Funded partners
b.	Provide increased technical assistance, templates, and other support for data collection and reporting to partner projects.	Metro RTO evaluation team Contractors	Funded partners
c.	Continue the development of the MAE framework to allow ongoing adaptation and alignment with regional issues and opportunities.	Metro RTO evaluation team Contractors	Funded partners
d.	Pursue new technologies to collect better data on how funded projects perform.	Metro RTO evaluation team	Funded partners Technology companies

Performance monitoring helps Metro track the results of transportation investments to understand how they perform. The RTO program provides evaluation guidance for funding recipients, and additionally collects substantial data and develops regular comprehensive reports.

Performance measures are a way to receive feedback about whether the RTO investments are resulting in progress towards the region's goals, performance targets, and expected resources, as established in the RTP. Regular evaluation indicates how the RTO program contributes to RTP performance measures and supports regional goals. Where possible, the RTO program evaluation should align with the Oregon Department of Transportation's Transportation Options Plan's identified program measures. These measures, tracked by the state-funded providers, will give a statewide snapshot of the performance of Oregon's transportation option programs.

Key 2014 RTP Goals that pertain to the RTO program include:

- Goal 3. Expand Transportation Choices
- Goal 4. Emphasize Effective and Efficient Management of the Transportation System
- Goal 6. Promote Environmental Stewardship
- Goal 7. Enhance Human Health
- Goal 8. Demonstrate Leadership on Reducing Greenhouse Gas Emissions
- Goal 9. Ensure Equity

The RTO program conducts a program evaluation every two years to measure effectiveness of program investments and to track overall progress towards regional goals. The data for this analysis is collected through several survey instruments:

- The **Employee Commute Options (ECO) survey** is a state-mandated requirement for large employers (over 100 employees at a work site) to monitor and maintain the progress of commute options in encouraging employees to reduce their SOV trips to the work site.
- The **Oregon Department of Transportation (ODOT)'s annual participant survey** provides a snapshot of travel options participants by documenting mode split, travel options used, engagement, and satisfaction with travel options program services and interest in using travel options. The survey will also provide a "stage of change" analysis that gauges participants' stage of readiness. The survey can also be customized to each provider.
- Metro's **Regional Travel Options and Awareness Survey** tracks awareness of Metro's RTO programs, measures satisfaction with regional travel options, and examines traveler information tools, and commuter resources. The report also identifies key target audiences to help streamline RTO marketing efforts.
- **Metro RTO grantees survey** the populations reached through the grant activities and outreach, using measures from the Multiple Accounts Evaluation framework.

RTO program staff uses the holistic Multiple Account Evaluation (MAE) Framework to biennially evaluate all aspects of the RTO program. The MAE is a partner-informed evaluation tool that is customized to align with the RTO program's goals and objectives, as well as regional policy objectives. The MAE is an expansion of the evaluation process to include broader and longer-term changes enabled by RTO strategic planning, such as equity benefits, in addition to direct operational elements of the program, such as auto trips reduced.

The MAE process evaluates each project based on 18 indicators across five accounts:

- **Environment**- The project aids in enhancing and protecting the natural assets and environment of the region by reducing pollutants and consumption of energy and non-renewable resources
- **Equity and Health** - The project promotes equity and health benefits by creating opportunities for greater accessibility and use of healthier travel options for communities of color
- **Economy** - The project contributes to the region's economic vitality by promoting low cost travel options and the efficient use of land
- **Efficiency** - The project enables the transportation system (including freight, transit, personal vehicles, and active modes) to be used more efficiently through increased use of travel options and is run in an effective and efficient manner
- **Engagement** - The project raises awareness of, and participation in travel options resources and events among residents, employers, and other community members to use travel options and travel options resources and services more frequently

The MAE is a way of collecting all applicable data from all organizations funded through RTO to indicate the project successes and evaluating the RTO program as a whole. Instead of relying exclusively on measured vehicle miles reduced, the MAE highlights a variety of types of project success. Organizations select which indicators and accounts apply to their project and report on those outcomes. Levels of available data vary between different projects, based on the partner's capability and level of funding provided.

Goal 4 Performance Measures

The RTO program funds a wide variety of projects and partners, and the level of effort for data collection should be appropriate to the funding level for a particular project.

Table 6. Goal 4 Performance Measures

Performance Measure	Baseline	2028 Target	Data Collection Method
Metro, or Metro and grantee, agree to measure one or more indicators per project in context of project goals and funding	26 grantees (70%) collect measurable data that addresses goals	All projects include measures that address goals	Measures and indicators defined in RTO Multiple Accounts Evaluation
Measure context and trends to inform strategic approaches for the RTO program	Survey a regionally-representative sample every two years	Survey a regionally-representative sample every two years to track increase in the percentage of grants used to mature the capability of partners based on previous evaluation	Survey of regional population with context data

SECTION 3: IMPLEMENTATION

In spring 2018, Metro staff will work with TPAC to develop a funding allocation methodology and work plans based on the direction provided in this Strategy update. The following principles provide guidance for finalizing funding levels and for selecting partner projects.

Fiscal Management

Historically, about half of the total RTO program funds were made available to local partners as competitive grants or small sponsorships to implement specific programs and projects. Almost a quarter of the budget had been set aside for employer-based outreach, via TriMet and SMART, and about a quarter had been budgeted for staffing the planning, evaluation, and grant program support, including managing the Collaborative Marketing Group, partner sponsorships, purchasing materials, and services (see Figure 8).

The RTO Strategy Update recommends altering Metro's existing method of allocating RTO funding to partners since adoption of the 2012-17 RTO Strategic Plan, as outlined in this section.

What we heard from partners:

- Metro staff support and technical assistance were vital for partners' ability to deliver successful projects
- The biennial grant timeline hindered partners' ability to develop and establish long-term, comprehensive programs
- The competitive grant structure made partners' fiscal planning and staff hiring difficult

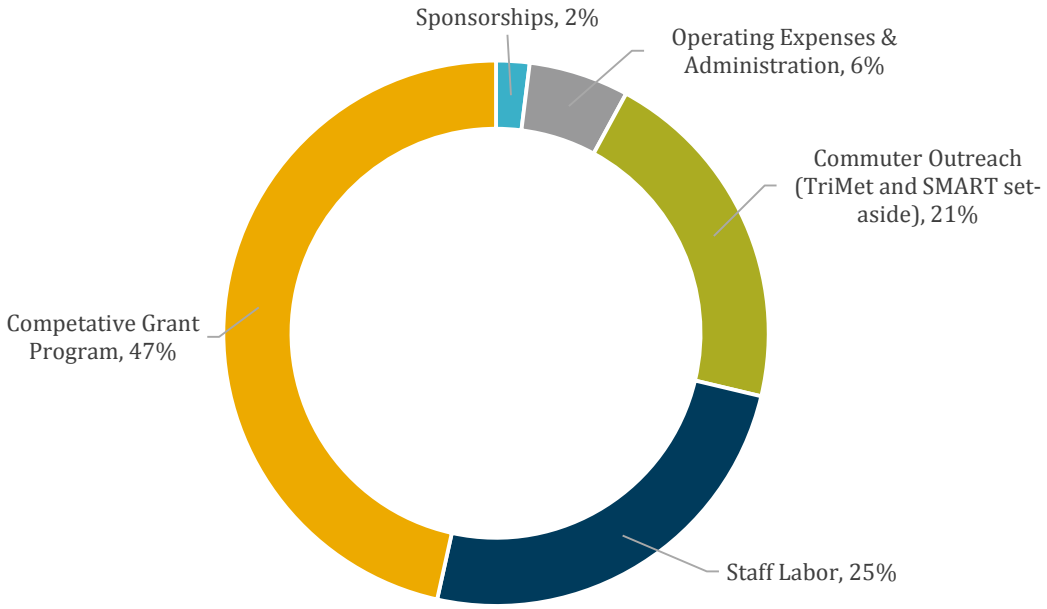

Figure 8. Breakdown of RTO Costs, 2017-2018 Fiscal Year

Metro's Program Management and Oversight

The RTO program has historically operated with minimal staff support for the many activities delivered and supported throughout the region, with 3.75 full-time equivalent staff (divided among seven individuals).

Metro will continue to support partners and work towards RTO program goals by:

- Coordinating RTO activities, including grant management, project scope of work and Request for Proposals development, project management, troubleshooting, reporting, survey research, and evaluation
- Providing education and technical support for partners through the Collaborative Marketing Group regular meetings, special workshops and opportunities, sponsorships, and regular communications
- Developing and implementing marketing programs with partners
- Conducting a biannual evaluation of the overall RTO program and the individual grantees' projects
- Ensuring the program continues to be aligned with the RTP and other regional policy direction
- Reporting and communicating the impacts and benefits of the RTO program to stakeholders and the community at large

What we heard from partners:

Key takeaways from the stakeholder engagement related to administration and oversight include:

- The RTO program is well-known among partners who work on transportation issues
- The RTO supports diverse projects that serve many communities and needs throughout the region
- It can be hard for partners to know how to engage with the RTO program efficiently and effectively
- Communities outside the city centers do not always feel included, including smaller and more suburban communities
- Communities of color, older adults, youth, and people with disabilities are less aware of RTO resources

Based on stakeholder feedback and the recommendations in this Strategy, expanded Metro staff capacity could better support existing and new partners and help achieve targeted outcomes.

Project Implementation

The RTO program supports a variety of projects that seek to shift trips away from driving alone and that support travel options including walking, biking, transit use, and carpooling, as summarized in **Error! Reference source not found.** Metro supports these types of projects through grant funding, as well as through sponsorships and technical assistance. This categorization is a slightly modified way of defining the types of projects eligible for funding, but it does not change the specific types of projects that are eligible or likely to be funded.

Table 7. 2018 RTO Project Categories

Category	Likely partners	Needs addressed
Commuter-based services: Programs that shift commute travel behaviors to non-single occupancy vehicles (SOV) modes through direct marketing and educational outreach to employees or through employers	• Transit agencies • Transportation Management Associations (TMAs) • Colleges & universities • Cities with large employment bases • Business organizations • Private sector partners (working with eligible partners) • Vanpool operators (Enterprise)	• Congestion • Air quality • Parking shortages • Access to jobs • Lack of transit • Last-mile connectivity • Cost of driving
Community-based services: Programs that shift travel behaviors away from SOV use for non-commute travel through community-based programs, events and activities	• Cities • CBOs • Counties • TMAs	• Safety • Health • Air quality • Land use • Active Transportation • Equity reach
Safe Routes to School: Programs that shift school travel to non-SOV trips to K-12 school schools	• School districts • Cities • Counties • CBOs	• Safety • Health • Air quality • Land use • Active Transportation • Equity reach
Traveler information & services: Programs/projects that create new sources of information to help people become aware of and use non-SOV modes (includes light infrastructure such as bike parking and wayfinding signage)	• TriMet (technology, bike parking) • SMART • Cities • Counties • TMAs • Colleges/universities • Private sector partners	• Wayfinding • End-of-trip/bike parking • Incentives • Data maintenance and improvements • Innovations that improve access & reach
Planning: Development of local approach to implementing RTO programs. Can be component of a local Transportation System Plan, or provide further strategic guidance	• Cities • Counties	• Defines a specific approach to how to implement RTO programs. Unique to local needs/priorities

Based on feedback and public comment, and a shift in policy direction to reach communities of color, older adults, youth, and people with disabilities, starting in the 2019 RTO cycle, the Metro RTO program will move away from a wholly competitive grant model. Instead, the program will establish a new a distribution methodology intended to achieve the updated goals and objectives of the 2018 RTO Strategy.

This change will enable Metro to curate RTO activities, enabling staff to work directly with partners and craft activities to achieve the RTO Strategy. It also can help leverage and build on relationships between current and new partners, to reach new audiences.

Funding Principles

Funding allocations should be based on the potential for reducing vehicle miles traveled, equity needs in the community served, and partner capacity and readiness for implementing the activities. Projects that meet multiple of these criteria (i.e. projects in an area with high potential for VMT reduction and that serve equity needs) will be prioritized for funding. In the future, if the RTO program were to receive additional funding, more initiatives could be added to the program. Potential ideas include increased funding for local programs, combined with increased technical support from Metro, implementing regional-scale programs such as individualized marketing, or adding shuttle services such as vanpool.

Potential for Promoting Travel Options

As increased access to and use of travel options is the primary goal of the RTO program, funding should be prioritized to projects with the greatest likelihood of encouraging and enabling use of walking, biking, carpooling, and transit use. Travel options programs have proven the most successful in locations that have good access to travel options, such as high-frequency transit and developed and well-connected pedestrian and bicycle networks. Figure shows the existing drive-alone rate compared to access to transportation options. Focusing RTO investments on areas with high drive alone rates, as well as high access to transportation options, has the most potential for reducing VMT and SOV trips.

RTO programs include fun and community-building events like a walk to celebrate local murals.

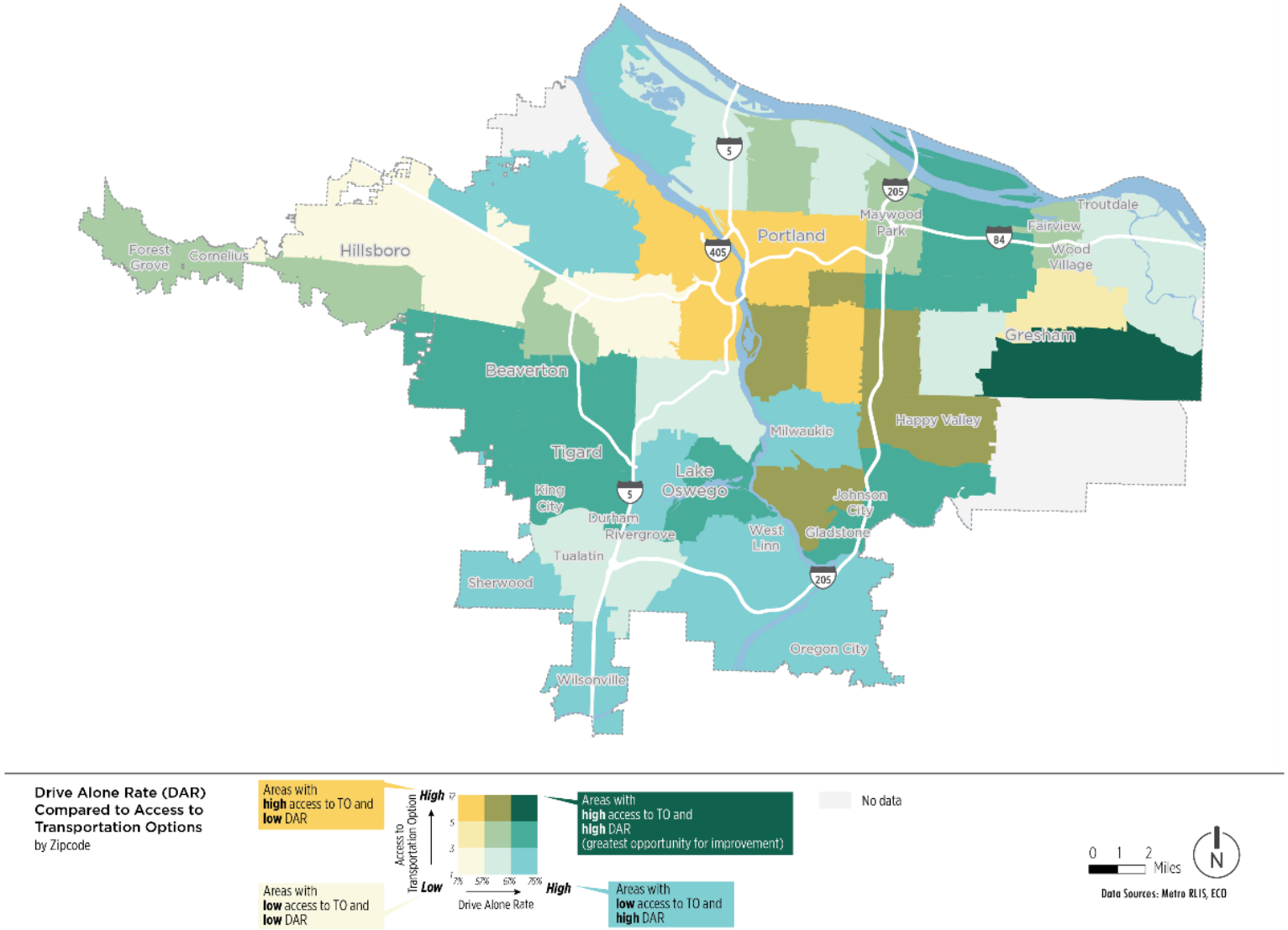

Figure 9. Drive Alone Rate Compared to Access to Transportation Options in the Metro Region

Partners' Capability and Readiness for Implementing Travel Options

Metro strives to support partner organizations' capacity and growth through the RTO program. This Strategy recognizes that there is no one size fits all solution to integrating transportation demand management tools into an agency's practices and culture. However, best practices have been established to promote travel options as part of organizations' standard operating procedures, budgeting, and staffing plans.

Table 8 on page 5 provides an index that partners can use to self-evaluate their capability and integration with regards to travel options work. The Travel Options Capability Index identifies the various phases in the growth and maturity of local RTO program efforts, and provides a guide for partners to use in identifying the level they wish to attain regarding their engagement with the RTO program.

RTO Requirements for Public Agencies

Public agencies operate under the policies of their respective Transportation System Plans (TSPs). City and county TSPs are required to include Transportation System Management and Operations (TSMO) plans to improve the performance of existing transportation infrastructure within or through the city or county.

A TSMO plan must include transportation demand management (TDM) investments, such as individualized marketing programs, rideshare programs, and employer transportation programs. The RTO program provides support and funding to agencies so they can more fully plan and implement TDM programs.

The updated funding structure outlined in this Strategy addresses past issues by providing funding to designated Core RTO partners through a non-competitive basis. These Core partners would be identified using the Travel Options Capability Index, a matrix partners can use to self-evaluate their capability and integration with regards to travel options work. Core partners are those who are functionally at Level 4 or above. For Emerging partners – those at Level 3 or below – competitive funding would continue to be available to support their work and to potentially build their efforts to Level 4 standards and enable them to receive non-competitive funding.

It is noted that some communities' experience, funding and institutional barriers that may prohibit moving up along this index. Metro's role will be to assist partners and communities in deepening their work to support moving between levels and to help them achieve their local goals and objectives relative to RTO work.

Attaining Level 5 status in the Travel Options Capability Index may be less relevant to some partners, such as community-based organizations and school districts. When allocating funding and resources, Metro will also consider the organization's staffing capacity, prior obligations, relationships with the target community, and historic performance. It is recognized that RTO partners at all levels of the Capability Index provide valuable and useful contributions to the program's goals and objectives.

Funding and Support

To help fulfill the Strategy goals of growing the RTO program in an equitable and performance-based manner, several adjustments to the program are suggested. Metro will broaden the number of funding opportunities available to partners, as well as increase the length of time for some grants from two years to three. Additionally, the program will dedicate funding to key areas in the region where growth is needed, add more flexibility to the types of projects funded to meet a broader range of community needs and to incentivize innovation, and provide more frequent opportunities for partners to access grant funding.

Metro intends to award funding to partners through the following grant categories:

1. Core program funding

Over the past several grant cycles, the majority of RTO work has been accomplished by both government agencies and non-profit organizations. Both types of partners have unique sets of organizational responsibilities and capabilities, and are committed to delivering an ongoing RTO program to their audiences and constituencies.

a. Core Agency Partner Funding (Capability Level 4 or 5)

Core agency partners are government entities that have a responsibility for operating and managing portions of our region's transportation system and have recognized that managing travel demand is a necessary and required element of their efforts to do so. RTO work is a key function of the organization, and they have a commitment to, and alignment with, the RTO Strategy. They have received previous funding awards from the RTO program to support their work. The organization uses their local funding for staffing and technical support over and above what is required to match the funding they receive from Metro. These agencies meet most or all of the elements defining a partner at level 4 or 5 on the Travel Options Capability Index.

Core agency partners have:

- A **commitment** to RTO work, codified through specific and detailed planning guidance, such as a strategic plan, RTO-specific content in a Transportation System Plan, or other policy guidance that identifies the agency's goals and objectives and defines their work relative to the RTO program. Local development codes include TDM measures as a means of addressing parking and trip generation issues.
- Dedicated support structure, including **funding, staff, and resources** to work on travel options, in line with staffing level guidance as found in the Travel Options Capability Index (0.50 or (ideally) greater FTE).
- Established precedents for **measuring, evaluating and quarterly reporting** on the outcomes of their work, and refining it based on results and emerging trends.

b. Core Non-profit Partner Funding (Capability Level 4 or 5)

Core non-profit partners are non-government entities that are focused entirely or in part on making travel options more attractive, safe or viable for their target populations. Their organizational mission aligns with the mission, goals and objectives of the RTO program and they have several previous RTO grant awards. They have unique outreach capabilities that governmental partners may not possess, particularly with communities of color and other underserved communities, or with expertise in various travel options. RTO funding is used to expand their capacity for staffing and technical support, but does not constitute the sole or primary source of revenue for the organization. These agencies meet most or all of the elements defining a partner at level 4 or 5 on the Travel Options Capability Index.

Core non-profit partners have:

- A **commitment** to RTO work, codified through the organization's mission, goals and objectives, or through another form of organizational direction that guides their work.
- Dedicated **funding, staff and resources** to work on travel options, in line with staffing level guidance as found in the Travel Options Capability Index (0.50 or greater FTE).
- Established precedents for **measuring, evaluating and quarterly reporting** on the outcomes of their work, and refining it based on results and emerging trends.

Metro recommends providing sustained, ongoing funding to both groups of Core agency partners, recognizing their work is critical to the success of the overall regional program and their historical success in previous competitive funding allocations. While their roles as public and private partners may differ, they both have a common purpose relative to the RTO program. Typical program elements of Core partners include employer or community outreach, Individualized Marketing, Open Streets, or other community events, etc. Funding agreements would be for three fiscal years, with annual review and adjustments of scopes of work (if needed). To be eligible for funding, the following criteria will apply:

- Working with Metro staff to develop a three-year work plan and budget for RTO funds
- Using RTO and Metro data to help inform work plan objectives and tasks
- Cooperatively working with Metro to develop performance measures and goals
- Leveraging RTO dollars with funding over and above required federal match amount
- Submitting quarterly and annual reports on progress (required for payment of invoices)

Funding levels for Core partners will be determined based on previous grant awards and anticipated program needs, as well as overall RTO program funding needs. Final 2019-21 funding levels for Core partners will be based on discussions with and coordination between partners, Metro staff, and regional leadership.

Subsequent to the 2019-21 three-year agreement, future funding agreements will be contingent on sufficient funding being available to continue the RTO program and supporting eligible partners. Additionally, partners must meet the above criteria throughout the funding period. Metro intends for funding agreements to be flexible, if necessary; partners may work with Metro to make adjustments to their work plans if it is apparent that the proposed project or program is not achieving desired results, if their program budget or ability to provide match funds changes, or if other conditions emerge that create difficulty in achieving the original intended outcomes.

2. Emerging Partner Funding (Partners with Capability Levels 2 or 3)

Emerging partners are organizations that have not yet reached the level of commitment to RTO work of Core partners, but who may have conducted RTO projects in the past and who aspire to develop a more formal commitment to travel options with the goal of attaining Core status.

Following the method used to determine Core partners, Metro is creating two funding opportunities for government agencies and non-profit partners.

a. Emerging Government Agencies

As with Core agency partners, Emerging agencies recognize that RTO work is a key element in how they manage travel demand on their local transportation systems. They may have conducted or participated in RTO events previously but have not yet developed policy and planning guidance for ongoing RTO work. Metro seeks to assist government agency partners in developing and initiating ongoing local RTO programs. Potential grant activities for Emerging partners include:

- **Planning** work to identify needs and develop local RTO goals and objectives to provide a framework for further RTO work.
- **Staffing and materials** funding to implement and carry out initial planned RTO program activities, or to expand initial RTO work into a larger effort.
- **Staff development** activities such as attending statewide conferences or professional trainings, or other opportunities to improve staff knowledge and understanding of successful TDM tactics.

b. Emerging Non-profit Partner Funding

Similar to their Core counterparts, emerging non-profit organizations possess certain connections with audiences or expertise that potentially enable them to take a more formal role in the RTO program. Their organizational mission may partially align with that of the RTO program and they aspire to expand their capacity to become a Core partner. These organizations may be strategic partners to government agencies to help achieve mutual goals. Potential grant activities for Emerging partners include:

- **Planning and Coordination** work to identify community needs, develop relationships with local governments, and create strategic outreach methods.

- **Staffing capacity and materials** funding to implement and carry out initial planned RTO program activities, or to expand initial RTO work into a larger effort.
- **Staff development** activities such as attending statewide conferences or professional trainings, or other opportunities to improve staff knowledge and understanding of successful TDM tactics.

The long-term goal for this funding category is to create additional Core partners and expand the overall RTO program's ability to reach a greater portion of the region's residents. Recipients are committed to increasing their involvement with the RTO program and developing an ongoing local program to engage with their community. Over time, it is anticipated that some of these partners will develop programs at level 4 or 5 on the Capability Index. This enables a greater portion of the region's population to be reached with RTO program work.

3. Marketing and Outreach Support (Partners from all capability levels)

Based on need, Metro anticipates awarding 3-4 small grants annually to partners or groups in the region to develop and produce marketing campaigns, materials or initiatives to support community outreach. To assist partners, Metro will provide staffing support to project manage the development, design and production of campaigns and/or materials. Recipients will work closely with Metro to develop outreach targets, messaging, and strategy.

Some examples for how this funding can be utilized by partners include:

- Creating outreach materials targeted to non-English speakers that can help them ride a bicycle more safely.
- Testing new approaches, messages or creating materials to expand an existing program, such as community outreach at local events or a suite of online content.
- Creating a community-specific outreach campaign, such as an awareness campaign about new infrastructure or transit options, or creating workplace travel options messaging and materials, to encourage more transit and active transportation commuting.

4. RTO Sponsorships (Partners from all capability levels)

Metro will continue to provide small funding awards of up to $5,000 to support materials, events, and activities that promote travel options as a core function, such as outreach at a community event, production of an Open Streets event, or electronic transit display boards. RTO funds may be combined with other Metro sponsorship funds if the activity is of sufficient regional significance. There are no local matching funds required for these funds. Measurement requirements are minimal, such as a description of the audiences reached, the RTO message being delivered, and a follow up report listing participation and engagement levels or other related outcomes. Metro can provide additional support via on-call contractors that are tasked with providing outreach staff and materials at community events (see "Metro support for partners" section below).

Examples of how this funding can be used include:

- If a city is interested in hosting an Open Streets event, such as Portland Sunday Parkways, Metro can provide funds to help cover the cost of putting on such an event, such as community outreach, materials, or supplies, etc.
- Printing of maps or educational materials to include in community outreach.
- Transportation safety tools, such as lights, helmets, or bike locks to support programs.
- Covering costs of developing a travel options outreach presence to be used at a local community festival, parade, or a similar public event.
- Sponsoring a conference or other educational event aimed at training others to become better-versed in teaching others about the benefits of using travel options.

5. Small Grants Funding (Partners from all capability levels)

It is important to offer opportunities to test new ideas and technologies, to provide funding for necessary small infrastructure projects, and to support new outreach projects, in order to have a well-rounded RTO program that supports a spectrum of needs. To address these needs, a portion of funding to be allocated through a competitive grant process is identified for the following types of projects:

1. Small infrastructure grant funds help to build projects that help people discover and use travel options, such as on-street shared lane markings or wayfinding signage. They also can fund bicycle parking or other end-of-trip facilities to remove barriers to using these modes.

   Examples of how this funding could be used include:

   - Purchasing and installing bicycle racks for use by the public at strategic destinations in a community.
   - Installation of a public bicycle repair and water refill station in a park or along a regional trail.
   - Signage in a town center or other pedestrian-oriented area, to guide people to points of interest and public services.
   - Painting shared lane markings.
   - Other directional marking on designated bicycle streets.

2. Innovation support will enable Metro to support technology-based public-private partnerships. With fast-changing technology, urban growth, and increase in travel demands, Metro will seek new ways of investing in technology that supports the RTO goals.

Innovation support promotes new technologies by testing new innovations, exploring partnerships, developing business models, and investigating new technical capabilities, while also evaluating projects. Promising applications of these technologies include:

- Commute management programs (e.g., Luum, RideAmigos) could enable grantees to better notify travelers of their options and collect evaluation data more easily.
- Carpool matching programs (e.g., Scoop) make it easier to get people into carpools, and some newer platforms can accommodate more flexible schedules than traditional web-based options.
- Transit data modernization services (e.g., Trillium Transit) could help smaller public transportation operators get their service data into GTFS format so that it can be accessed via online mapping and trip planning platforms.
- A variety of new mobility services, such as ridehailing (Uber/Lyft) and microtransit (Via), could enable human service transportation providers like Ride Connection to provide better and more efficient service, enabling them to serve more riders, and reduce emissions from larger, single-purpose vehicles.
- A number of cities have been experimenting with using new mobility services to provide first and last-mile connections to transit, either by operating services or by subsidizing commercial services like ridehailing and car sharing.

3. Program and project funding enables partners to develop and conduct new or additional methods of engaging the public with a travel options message. This funding opportunity provides the means for jurisdictions or non-profit partners to create and produce new or expanded outreach events, programs or strategies aimed at engaging with underserved communities. This will assist partners - particularly those who are at Level 2 or 3 - start working with communities to discover travel needs and wants, and help present other options to new participants.

Table 8. Travel Options Capability Index

	1 – Unaware	2 – Exploratory	3 – Defined	4 – Adoptive	5 – Optimized
	Few or no RTO activities	**Occasional, ad-hoc RTO activities**	**Basic level of RTO activities**	**Advanced level of RTO activities**	**High level of RTO activities**
Maturity level	Partner has no awareness or understanding of RTO, or has no plans to begin local program. Efforts to reduce auto trips are not a part of their business model.	Local program is in exploratory stage. Partner is aware of RTO, and sees value in program engagement, but has not yet committed to ongoing efforts. Is interested in or may have already participated in RTO events primarily led by others.	Initial level of program development & implementation. Partner has made an ongoing commitment to conducting one or two RTO program activities annually.	Further level of program development & implementation. Partner has partially operationalized RTO activities. Has dedicated staff responsible for conducting multiple ongoing RTO program activities.	Fully developed and mature program. Partner has fully operationalized RTO activities. Has dedicated manager + staff supporting an array of RTO program activities.
	0.00 FTE	0.10-0.25 FTE	0.25-0.50 FTE	0.50-3.00 FTE	3.00 + FTE
Staffing level	No staff time dedicated to RTO activities	RTO activities are one of several duties performed by staff (in-house or contracted).	RTO activities comprise a significant portion of a staff person's time; is considered an important function of organization.	RTO activities comprise most or all of one or more staff person's time; is considered a core function of organization.	RTO activities comprise all of multiple staff person's duties, including; has dedicated organizational unit and manager
Local funding	No local or regional funding	Minimal level of local funding, required to pay staff and provide marketing and support event(s) or project.	Local funds provide match for RTO funds (~$50K/yr), or RTO activities are 100% locally funded	Local funds provide match for RTO funds ($50-100K/yr)	Local funds provide match for RTO funds (>$100K/yr), plus additional local funding dedicated to program activities

	1 – Unaware	2 – Exploratory	3 – Defined	4 – Adoptive	5 – Optimized
	Few or no RTO activities	**Occasional, ad-hoc RTO activities**	**Basic level of RTO activities**	**Advanced level of RTO activities**	**High level of RTO activities**
Partnerships	No agency or NGO partners	Collaboration with partners is informal and predominantly ad hoc	Staff collaborate with key partners focused on transportation issues	Staff collaborate with a variety of partners, including non-transportation-focused NGOs	Multiple agency & NGO partnerships
Goals & objectives	None	Activities are informal, reactive, and not integrated into planning policy.	Official policy supports TO work but lacks specific details on implementation.	Policies support TO work with specific goals and actions.	Specific, documented strategic direction, aligned with local TSP, regional & state plans.
Evaluation & measurement	None	Minimal data collected, mainly qualitative	Qualitative & some quantitative data collected on most activities	Qualitative & quantitative data collected on all activities	Qualitative & quantitative data collected, analyzed and evaluated for all program activities
RTO partner status	None	May apply for sponsorship, attend CMG or other events occasionally	RTO funding recipient – applies for competitive funding on periodic basis	Core RTO partner – has agreed to performance metrics and other conditions in exchange for dedicated funding	Core RTO partner – has agreed to performance metrics and other conditions in exchange for dedicated funding. Amount may be greater than Level 4 due to greater potential for ROI

Equity Considerations

In addition to VMT reduction, Metro should focus funding on projects that address the barriers faced by communities of color, older adults, youth, and people with a disability. This Strategy identifies ways of making the program structure and resources more useful for community-based organizations, many of whom represent or work directly with communities of color, older adults, youth, and people with a disability. Some of these changes include the following:

- Create a specific, significant fund for projects that fulfill the equity goals and objectives, with options for smaller grants and a reduced administrative burden.
- Offer resources tailored for community-based organizations through the CMG, such as behavior change best practices, professional development opportunities, and outreach templates.
- Offer ways to participate in CMG and other RTO related meetings and workshops remotely.
- Continue the sponsorship program for non-profit organized events and activities that address Metro's RTO goals and objectives.
- Provide translation and interpretation to partners and advise on culturally-competent outreach.

Technology Principles

Metro should create an innovation grant program in order to test partnerships with technology providers that have the potential for supporting travel options work throughout the region. The RTO program should use the following principles to promote technological innovation:

- **Fund deployment rather than development:** Focus on funding projects that encourage widespread use of helpful technologies. Development of new technology will be left to the private sector.
- **Provide data** so the RTO program can learn and adapt to changing circumstances.
- **Foster competition:** Projects should avoid giving preferential treatment to specific platforms and companies, unless through an open competitive process.

Public agencies and non-profits should lead the way for deploying technology around the region. The RTO program will support those groups and establish a way for them to partner with private companies.

Collaborative Marketing Group

While the CMG plays an important role in the RTO program, there are opportunities to modify the existing structure to better meet the needs of a growing and changing region. Through the public engagement process included in the update of the RTO Strategy, partners provided ideas for potential improvements to the CMG.

Potential tactics to expand participation and encourage deeper partner involvement include:

- **Re-name** to more approachable, clear name
- Offer opportunities for partner organizations to **conduct their own marketing campaigns and pilot projects** with Metro support.
- Provide **onboarding support** for new members and information for why and how new organizations should get involved
- Offer a **variety of engagement options** particularly focused on organizations that serve target communities, but may lack a transportation-specific mission
- **Focus campaigns and resources on reaching target audiences**: communities of color, youth, older adults, and people with disabilities
- Look for opportunities to **link marketing campaigns with infrastructure improvements**
- Create a **Scholarship Fund** to support organizations with capacity challenges to attend professional development events such as conferences and workshops
- **Provide planning support** for developing TO strategies or integrating TO work into local TSPs
- Provide **case studies** for regional best practices

Transition Plan

The changes recommended in this strategy will require local partners to make adjustments to their existing programs and initiatives in order to implement the new RTO plan. New or revised elements of the Strategic Plan will be phased in over the next year, in order to make the transition as easy as possible for partners.

Next steps over the next one to three years of the RTO program include:

Coordination and the Collaborative Marketing Group

- Consider renaming the CMG to more clearly state the purpose of the group for new participants, which is to provide travel options education and resources to residents in the greater Portland metro region by building partners' capability and expertise.
- Pursue ways of encouraging new partners to engage with the CMG, such as new participant orientation, online webinars, professional development trainings, and promotional materials explaining the benefits of participation.

- Work with partners to determine where they are on the capability matrix and where they aspire to be, and to develop next steps for deepening partners' involvement in travel options work.

Local Implementation Support

- Developing updated funding methodology and allocation process with TPAC.
- Host training and workshops to engage existing and new partners in revised local implementation funding process.
- Provide additional support to help partners develop scopes of work and project evaluation plans.

Implementing a Regional SRTS Program

- Hire SRTS support staff and/or contractors to coordinate the regional program and develop program materials and resources.
- Support staffing and resources for local programs in school districts, jurisdictions or community-based organizations through grant funding.
- Convene a regional SRTS group, building off of the SRTS National Partnership's bi-monthly Portland-area Regional Practitioner's meeting, which will provide guidance and local examples for regional program materials and resources development, as well as coordinating between cities and school districts that share boundaries.
- Provide technical assistance and support for consistent data collection and baseline measurement of school travel patterns and attitudes.
- Conduct outreach to school districts by highlighting local successes and explaining the benefits of getting involved in SRTS programming.
- Focus technical assistance in communities of color directly or through local programs.

Conclusion

The 2018 RTO Strategy defines a ten-year mission, goals, and objectives to coordinate, implement, and evaluate local partners' efforts that help achieve regional air quality, transportation, equity, and livability goals. To overcome challenges experienced in the past, and to form new partnerships to better reach new audiences, this Strategy re-envisions an RTO program that works collaboratively with local government agencies, school districts, community-based organizations, and the private sector.

This Strategy provides the guidance and approach to help Metro staff work with TPAC to define a program that is flexible and forward-thinking while attuned to the community's needs. Over the next ten years, this Strategy will guide Metro in working with community partners to create a more healthy and livable Portland region.

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ATTACHMENT A. GLOSSARY

CMAQ	Congestion Mitigation and Air Quality
CMG	Collaborative Marketing Group
ECO	Employee Commute Options
FTA	Federal Transit Administration
IM	Individualized Marketing
JPACT	Joint Policy Advisory Committee on Transportation
MAE	Multiple Account Evaluation
RFF	Regional Flexible Funds
RTP	Regional Transportation Plan
RTO	Regional Travel Options
SOV	Single Occupancy Vehicle
SRTS	Safe Routes to School
STBG	Surface Transportation Block Grant
TDM	Transportation Demand Management
TPAC	Transportation Policy Alternatives Committee
TMA	Transportation Management Association
TO	Travel Options
TSP	Transportation System Plan
VMT	Vehicle Miles Traveled

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Clean air and clean water do not stop at city limits of 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.

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